



Event Planning Check List

TYPE OF EVENT?

- ☐ Club
- ☐ Programing Board
- ☐ Campus

EVENT DESCRIPTION: (Include the following)

1. Purpose of the event.
2. Who will attend?
3. When will the event take place and event location.

EVENT CHECK LIST AND REQUIREMENTS:

- ☐ Confirm the purpose of the event.
- ☐ Develop timeline/tasks (work back from event date). Approvals confirmed 2-3 weeks prior to event.
- ☐ Reserve Space for the Event:
 - Collaborate with advisor to check space availability through 25 Live: <https://www.uww.edu/its/services/room-reservations>
 - Reserve space through Rock Campus Scheduling. rck-scheduling@uww.edu
 - Complete Facilities Use Request Form; email Rock Campus Scheduling at rck-scheduling@uww.edu
 - Technical support: Javier Martinez at MartinezJM29@uww.edu and Trevor Rees at reest@uww.edu
 - Confirm with Risk Management (if necessary), Tanja Anderson at andersot@uww.edu
- ☐ Contact Program Advisory Board rck-programboard@uww.edu early with your ideas. They can provide potential support and update calendars when confirmed.
- ☐ Identify Resources: money, people, supplies/decorations, items, food, etc. See list below.
 - ☐ Budget Club Event: Confirm funding with advisor and Janine Peterson, petersjm@uww.edu
 - ☐ Budget Campus Event: Contact Dean Clasen to determine available budget, classenp@uww.edu
 - ☐ People: Delegate and assign duties to Advisor and Club Members. Use checklist as a guide.
 - ☐ Purchases: Supplies, equipment, food, entertainment, prizes, etc.
 - o Purchases must be tax exempt.
 - o Approved and documented in minutes by club members or campus committee.
 - o Collaborate with your Advisor, Tanja Anderson, and Janine Peterson
 - o Complete Food Expense Checklist (attached)
 - o Complete Prize Form if holding raffles, bingo events, give away events. (attached)
 - o Speakers or Entertainment: Work with Tanja Anderson regarding required paperwork:
 - Quotes and Contracts
 - Insurance
 - Tax Information for Payment, etc.
 - Background checks
- ☐ Event Promotion:

- Complete Advertising Qualtrics Survey for Marketing Team:
https://uwwhitewater.co1.qualtrics.com/jfe/form/SV_3ypqPKVb1S6bUCW

Team members will assist with your event promotion. Members include: Ashley Mallu, MalluA15@uww.edu, Janine Peterson at petersjm@uww.edu and Zoe Cross at crossz@uww.edu

- Options for Event Promotion:
 - Campus Inside Electronic Kiosks
 - Outside Digital Sign
 - Student Emails – Janine Peterson, petersjm@uww.edu, Tricia Clasen, clasenp@uww.edu
 - Flyers/Posters creation and distribution (Solution Center approves and stamps).
 - Sandwich Boards – located in the mailroom.
 - Social Media (Facebook and Instagram):
 - Events Calendar – Program Board and UW Whitewater
 - Programming Board – will add to events calendar.
 - Community Locations – determined by student organization.
 - Movable Triangle Kiosks
- Cash: Are you selling items, charging for the event, or collecting monetary donations? You must follow cash handling procedures.
 - Club members managing cash must go through a background check process.
 - Contact Tanja Anderson, UWW Rock County Campus Administration Assistant at andersot@uww.edu for more information and set-up.

DAY OF EVENT

- Who is staffing the event? Make sure they are ready. Include your Advisor.
- Take Pictures
- Be available for set-up and take-down as required and submitted on Facilities Use Request Form.
- Have access to Maintenance as needed. 608-758-5442
- Review cash handling process/procedures.
- Record attendance on sign-in sheet. Required for expense reimbursement.

POST EVENT:

- Evaluate event!
 - Were objectives met?
 - Did attendance meet expectations?
 - Were participants interested?
 - Is this an event you would like to hold next year?
 - What will you need to improve on?
- Collaborate with advisor and administration to deposit cash.
- Complete all purchasing paperwork for reimbursement!
 - Copy of club minutes approving the event and authorizing expenditures
 - Copies of invoices and shipping notices for supplies
 - Receipts and copies of receipts of purchases
 - Copies of advertising materials (posters, social media posts, etc.)
 - Copies of sign-in sheets