

# The University of Toledo Foundation

## Advancement Events Timeline

### 15 Weeks Prior

Task	Comments	Completed
<b>Determine goals and purpose of event</b>	<ul style="list-style-type: none"> <li>▪ Who is your target audience for the event?</li> <li>▪ What is this event trying to accomplish?</li> <li>▪ What are your key messages?</li> <li>▪ How will you gauge effectiveness?</li> <li>▪ Is this event saleable? Could it become a series/road show?</li> </ul>	
<b>Select date and time</b>	<ul style="list-style-type: none"> <li>▪ Ensure hosts, VIPs, and/or speakers are available for specified dates (work via admin. assistants)</li> <li>▪ Determine if VIPs spouse will be invited and ensure they can attend</li> <li>▪ Consult campus calendar/religious calendars when selecting</li> </ul>	
<b>Set budget</b>	<ul style="list-style-type: none"> <li>▪ Research potential funding sources such as partnering with other departments</li> </ul>	
<b>Select and reserve venue</b>	<ul style="list-style-type: none"> <li>▪ Remember to review:</li> <li>▪ A/V capabilities</li> <li>▪ Parking availability/restrictions</li> <li>▪ Maximum capacities</li> <li>▪ Other events occurring near space – will they conflict?</li> <li>▪ Accessibility – how will persons with disabilities enter the venue?</li> <li>▪ Access times to space</li> <li>▪ Load-in/delivery capabilities</li> <li>▪ Included equipment with room rental</li> <li>▪ Surrounding sound impediments</li> <li>▪ Security issues</li> </ul>	
<b>Schedule rain plan, if applicable</b>	<ul style="list-style-type: none"> <li>▪ Select venue</li> <li>▪ Determine who will make the rain plan call and when you will make your final decision</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ Speak with vendors about refund and cancelation policy costs and deadlines</li> </ul>	
<b>Determine guest list</b>	<ul style="list-style-type: none"> <li>▪ Consider your target audience and key messages</li> </ul>	
<b>Ensure inclusivity, accessibility, and sustainability</b>	<ul style="list-style-type: none"> <li>▪ Consult with the ADA's guide for events</li> <li>▪ Consult with UToledo Office of Sustainability</li> </ul>	
<b>Develop a production schedule for any design elements</b>	<ul style="list-style-type: none"> <li>▪ Include items like your program, flyers, website graphics and signage</li> <li>▪ Determine deadlines to send items to printers to receive materials on time</li> </ul>	
<b>Determine meeting schedule for your committee</b>	<ul style="list-style-type: none"> <li>▪ Create a reoccurring calendar appointment</li> </ul>	

### 12 Weeks Prior

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Develop a communication plan</b> UToledo Foundation assistance available	<ul style="list-style-type: none"> <li>▪ What is your event's main message?</li> <li>▪ How will this event be communicated to guests?</li> <li>▪ What media reaches your target audience?</li> <li>▪ Determine what channels to advertise and when is the best time to send messages.</li> </ul>	
<b>Update any website material</b>	<ul style="list-style-type: none"> <li>▪ Include common guest questions such as parking, dress code, and program schedule</li> <li>▪ Ensure the website offers accessible features like alt text in images</li> </ul>	
<b>Add event to campus calendar and discuss other internal promotion opportunities</b>		
<b>Contact Parking &amp; Transportation</b>		
<b>Schedule photographer, if needed</b>		
<b>Secure mailing house if you are to send out save-the-dates</b>		

<b>Begin researching travel arrangements and hotel options</b>		
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**10 Weeks Prior**

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Reserve hotel, plane, and travel accommodations for speakers, VIPs and staff, if applicable</b>	<ul style="list-style-type: none"> <li>Consider requesting a hotel block if a large portion of your attendees are traveling</li> </ul>	
<b>Secure A/V needs for event</b>	<ul style="list-style-type: none"> <li>Lighting, video, sound</li> <li>Ensure you have wireless remote, if using presentation and LCD projector/screen</li> <li>Coordinate additional mics in the audience for any Q&amp;A needs</li> <li>Coordinate on-site A/V tech for day-of</li> <li>Confidence monitors for speakers</li> </ul>	
<b>Design and create/order invitations</b> UToledo Foundation assistance available	<ul style="list-style-type: none"> <li>Confirm a way to ask guests about any accommodation requests such as ADA access or dietary needs</li> </ul>	
<b>Select &amp; book caterer</b>	<ul style="list-style-type: none"> <li>Do any of your guests have dietary restrictions?</li> <li>Remember vegetarian options</li> <li>Determine VIPs preferences/needs</li> <li>Will you need linens from the caterer or other rental company?</li> <li>Remember waters for the podium and/or bottled for guests, if applicable</li> <li>Gain approval from President or other host, if applicable</li> </ul>	
<b>Request and receive speaker and VIP guest bios</b>	<ul style="list-style-type: none"> <li>Ask for photo if included in program</li> </ul>	
<b>Send save-the-dates</b>		
<b>Order plants/flowers</b>	<ul style="list-style-type: none"> <li>Remember rental plants for staging and all floral needs</li> </ul>	
<b>Coordinate meeting with fire marshal</b>		
<b>Schedule supplemental staffing</b>	<ul style="list-style-type: none"> <li>Ushers, crowd management, etc.</li> </ul>	
<b>Send preliminary volunteer requests</b>	<ul style="list-style-type: none"> <li>Student Ambassadors are great resources</li> </ul>	

<b>Request participation of additional speakers</b>	<ul style="list-style-type: none"> <li>▪ Emcees, presenters, etc.</li> <li>▪ Always have someone introduce the President or other VIPs</li> </ul>	
<b>Order additional décor materials</b>	<ul style="list-style-type: none"> <li>▪ Flowers</li> <li>▪ Balloons</li> <li>▪ Pipe and Drape</li> </ul>	
<b>Reserve additional set-up materials</b>	<ul style="list-style-type: none"> <li>▪ Rental chairs</li> <li>▪ Stage</li> <li>▪ Podiums</li> <li>▪ Tables</li> <li>▪ Easels</li> <li>▪ Coat rack</li> <li>▪ Heat lamps</li> </ul>	

### 8 Weeks Prior

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Review printed materials with your designer</b>		
<b>Set menu with caterer – know that you can confirm the final head count closer to the event</b>		
<b>Secure permits and insurance</b>		
<b>Determine if awards/trophies will be given and research companies</b>		
<b>Release press announcements to national and local print media</b>	<ul style="list-style-type: none"> <li>▪ Work with MarComm</li> </ul>	
<b>Order any giveaways</b>	<ul style="list-style-type: none"> <li>▪ Consider partnering with other departments to share costs</li> <li>▪ Do not include a date, if possible, so items can be reused</li> </ul>	
<b>Arrange for transportation (buses, shuttles) if necessary</b>		
<b>Determine parking for visitors</b>	<ul style="list-style-type: none"> <li>▪ Direct guests to the campus map for directions</li> </ul>	
<b>Confirm accessibility resources</b>	<ul style="list-style-type: none"> <li>▪ Transcription</li> <li>▪ ASL Interpreter</li> <li>▪ Ensure you have a plan in place for assisting those with accessibility needs</li> <li>▪ Share plan with volunteers</li> </ul>	
<b>Order speaker gifts</b>		
<b>Request spirit/tradition groups</b>	<ul style="list-style-type: none"> <li>▪ Cheerleaders</li> <li>▪ Band</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ Mascots</li> </ul>	
<b>Begin editing printed programs and event materials</b>		
<b>Schedule A/V run-through the day before the event</b>	<ul style="list-style-type: none"> <li>▪ Schedule speakers/musicians and others to participate (if live streaming or captioning, include those individuals, as well as any social media testing, i.e. Facebook Live)</li> </ul>	

#### 6 Weeks Prior

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Assemble/address invitations</b>		
<b>Create RSVP tracking system</b>	<ul style="list-style-type: none"> <li>▪ Confirm a way to ask guests about any accommodation requests such as ADA access or dietary needs</li> </ul>	
<b>Mail invitations</b>	<ul style="list-style-type: none"> <li>▪ Set RSVP deadline 1.5 to 2 weeks prior to event date</li> <li>▪ Update website with RSVP information</li> </ul>	
<b>Order awards</b>		
<b>Distribute flyers/emails advertising event</b>		
<b>Finalize transportation logistics for VIPs and out-of-town guests</b>		
<b>Release press announcements to local TV, radio media</b>		
<b>Hold walk-through with major stakeholders/committee to ensure all needs are met</b>		
<b>Secure musicians/entertainers</b>	<ul style="list-style-type: none"> <li>▪ Determine if any sound checks are necessary</li> </ul>	
<b>Determine alcohol needs, if any</b>	<ul style="list-style-type: none"> <li>▪ Review the information about alcohol on the catering web page</li> </ul>	

#### 4 Weeks Prior

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Make a safety and emergency preparedness plan</b>		
<b>Place local print ads and watch for media hits</b>		
<b>Confirm staff/volunteers for each aspect of the event</b>		

<b>Make parking and directional signs that can be created in-house</b>		
<b>Create welcome packets and materials for attendees</b>		
<b>Create script for yourself or for VIPs/presenters</b>	<ul style="list-style-type: none"> <li>▪ Work with marketing at the Foundation or main campus to create talking points for the president or senior leadership team</li> <li>▪ Clearly mark each speaker change with dividers in the script book</li> <li>▪ Request scripts from all participants with a talking role to create a complete script book and ensure that speakers are not redundant</li> <li>▪ Include phonetic spellings for any individuals' names that might be difficult to pronounce</li> </ul>	
<b>Confirm all travel arrangements</b>		
<b>Confirm security needs and plan walk-through of site with them</b>		
<b>Coordinate with accounts payable and vendors on when payment will be received (in most cases, unless you purchase alcohol, after services are rendered)</b>		
<b>Schedule volunteer training</b>		

**2 Weeks Prior**

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Follow-up with RSVP list – make personalized phone calls &amp; emails, if necessary</b>		
<b>Send final numbers to the caterer</b>		
<b>Confirm participation with all VIPs/presenters. Send them updated event details, run of show, and talking points.</b>		

<b>Create seating plans and room diagrams for assistance with set-up and day-of-event questions</b>	<ul style="list-style-type: none"> <li>▪ Ensure you follow correct protocol for head table seating</li> <li>▪ Create place cards for seated, if needed</li> <li>▪ Ensure you have back-up seating options available for changes within head table seating arrangements</li> </ul>	
<b>Develop photo shoot list</b>		
<b>Hold pre-event meeting with all significant stakeholders (vendors, managers of venue, key committee members and volunteers, etc.)</b>		
<b>Do one last walk-through of venue</b>		
<b>Hold training session with volunteers</b>		
<b>Ensure all printed materials/collaterals are assembled and correct</b>		
<b>Make nametags/lanyards for attendees and extra plain ones for surprise guests</b>	<ul style="list-style-type: none"> <li>▪ Suggest magnetic/reusable with clip tags for those who are unable to use magnetic</li> <li>▪ Create two nametags for name variations (i.e. Joseph and Joe)</li> <li>▪ Machine for onsite nametags</li> </ul>	
<b>Create “Event Day Survival Kit” full of needed items: pens, sharpies, tape, scissors, etc.</b>		
<b>Create detailed hour-by-hour event agenda (event plan) for key volunteers/vendors and distribute to them</b>		
<b>Confirm set-up/breakdown with all vendors</b>		

<b>Send final information to participants, including directions, maps, last-minute details, etc.</b>		
<b>Distribute parking passes</b>		
<b>Send completed Run of Show and RSVP list to VIPs</b>		

### 1-2 Days Prior

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Create final to-do list to determine all tasks are complete</b>		
<b>Ensure all appropriate contacts' information is listed where you can easily retrieve it</b>	<ul style="list-style-type: none"> <li>Recommend they are added to your phone for easy texting capabilities on event day</li> </ul>	
<b>Purchase floral arrangements if not provided by vendor</b>		
<b>Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc.</b>		
<b>Reconfirm schedule with caterer</b>		
<b>Set-up registration area, if possible, so you are prepared for the next day</b>		
<b>Decorate room if you can</b>		
<b>Display parking/directional signs</b>		
<b>Gather all needed materials (name badge, notebook, etc.)</b>		
<b>Pick up liquor or have it couriered</b>		
<b>Deliver materials/equipment to venue site</b>		
<b>Test streaming</b>		
<b>Be prepared to troubleshoot changes day-of</b>	<ul style="list-style-type: none"> <li>i.e. bring along a three-hole punch so the President can input his revised script day-of, have extra chairs backstage in the event another VIP is asked to join the stage party, etc.</li> </ul>	
<b>Discuss rain plan logistics</b>		



**Day of Event**

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Arrive early and do one last walk-through</b>		
<b>Oversee vendor set-up</b>		
<b>Ensure all VIP materials are correctly labeled and in place</b>	<ul style="list-style-type: none"> <li>▪ Provide a program to President and VIPs so they know speaking order</li> </ul>	
<b>Check all set-ups</b>		
<b>Ensure waters are in podium</b>		

**Up to a Week After Event**

<b>Task</b>	<b>Comments</b>	<b>Completed</b>
<b>Send thank you notes</b>		
<b>Handle invoices</b>		
<b>Hold post-event meeting with key players</b>		
<b>Send pictures/mementos to VIP guests</b>		
<b>Pack up and inventory all materials</b>		
<b>Update website</b>		
<b>Book next year's venue, for annual event</b>		
<b>Rate caterer's performance</b>		