



# EVENT PLANNING CHECKLIST

Whether it's a student seminar, parent night or college fair, there are several things you can do to encourage student and parent participation when planning a college access event. UCanGo2 offers the following tips for planning, promoting and executing your next event. Check them off as you go to ensure it's a success!

## Logistics: Nail it Down

- Set the date.** Before you choose your date, think about potential conflicts with sporting events, concerts and other community events. It's best to avoid the day before and after a holiday, as well as Mondays and Fridays. Also, if you want parent participation, opt for evenings or weekends.
- Plan for your audience.** As you plan your event, think about your audience. What information do they need to know? How can you present that information in a way that's fun and interesting? Try to spice things up by including activities and videos in your presentation.
- Secure funding early.** If you're going to ask for donations, ask early. Many organizations have an annual donation budget, so make your request early in the year before their resources are exhausted.
- Expand your team.** Partner with other organizations or sponsors who share your goals and can provide support. They may be able to contribute money, volunteers or in-kind donations like refreshments. Consider listing them as a sponsor in your promotional materials or allowing them to distribute freebies or brochures at your event.

## Promotion: Get the Word Out

- Create promotional materials.** Print posters and flyers to hang in relevant community organizations and businesses such as libraries, schools and churches. In your event promotion, clearly state the topic(s) and note any resources that will be provided.
- Promote early and often.** Send save-the-date notices, post bulletin board flyers, distribute handbills and advertise in school newspapers.
- Utilize free resources.** Send email blasts, and don't forget to use your social media platforms to publicize your event. They're a great, no-cost way to get the word out.
- Get creative.** Think of cheap, out-of-the-box advertising methods like chalking the sidewalks at your local school.
- Be strategic.** Target audiences with an interest in the event, and gear your promotional materials and advertising strategies toward that group.
- Offer incentives.** Consider asking a local business to donate a raffle prize for event participants. Remember to mention the prize in your promotional materials to increase interest and attendance. Ask your teachers if they'd be willing to offer a few extra points to students who attend and bring back a signed brochure or handout from the event.
- Tell your colleagues.** Have an email list or listserv? Send invitations to the community and your colleagues in other organizations, and ask them to pass along the word to their contacts.
- Feed them.** Providing a meal or refreshments is a great way to encourage attendance and make your participants feel valued.
- Provide directions.** Post signs or markers outside the venue, if necessary, so people know where to go. You might also want to post signs to let people know where the presentation rooms and restrooms are located..

## Planning Content and Delivery: Get Ready

- Make a checklist.** Having a printed event checklist by can ensure you don't miss an important detail.
- Ask for help.** Ask local campuses for volunteers. Many teachers and professors require (or offer extra credit for) community service, and your event may serve as the perfect volunteer opportunity.
- Ask the experts.** Find presenters who offer free, relevant services. Contact colleges and universities to invite financial aid counselors to talk about the financial aid process. Oklahoma Money Matters and UCanGo2 will customize their presentations to fit your organization's individual needs. Visit [OklahomaMoneyMatters.org](http://OklahomaMoneyMatters.org) or [UCanGo2.org](http://UCanGo2.org) for more information; travel may be limited.
- Prepare an agenda.** To keep everything running smoothly, you'll need to know in advance how everything will fit together. Prepare an agenda and share it with everyone who will be participating in the event. Print extra copies for volunteers who will be helping out that day.
- Make the presentation quick and to the point.** Aim to effectively deliver the message in 30-45 minutes or less. Parents are more likely to attend if it isn't going to take their entire evening.
- Provide take-aways.** If you have informative materials or freebies, prepare them for the event. Make sure you give participants your contact information so they can reach you if they have questions later. Be sure online evaluation links or paper forms are available if you choose to use them.
- Go shopping.** Are you the one responsible for supplying snacks and/or drinks? Be sure to round them up in plenty of time. Don't forget plates, cups, plasticware, and napkins, too!
- Check your A/V needs.** Test your laptop, projectors, microphones, internet connection, etc. before your presentation. If you're hosting your event at a new venue, plan a pre-visit so you can check out the technical capabilities. If you've invited external presenters, ask them what their A/V needs are so you can accommodate them. You may want to enlist the help of an A/V "expert" for troubleshooting on the day of the event.
- Confirm.** Don't forget to confirm the event with your volunteers, presenters, venue, caterer, etc.

## The Big Day: Deliver the Goods

- Use your checklist.** Go through your list one last time, and be sure to double-check your A/V equipment.
- Let them know they're welcome.** Be sure greeters arrive early to welcome attendees and point them in the right direction.
- Keep them interested and engaged.** Keep presentations brief, and include short breaks to hold the attention of the audience. A friendly, casual atmosphere will encourage questions and feedback.
- Use designated "runners" to handle immediate needs.** Are the rooms warm/cool enough? Is there adequate seating for the audience in each room? Do the presenters have any last-minute needs? Your volunteers can help with these issues to ensure a successful event.
- Be available.** Keep an eye open for people who need help finding their way around.

## Follow up

- Ask them what they think.** Gather completed evaluation forms and summarize the results.
- Review and reflect.** Plan a meeting with your team to discuss the event. Did you stay on budget? Should you have done something differently? Compile a list of recommendations to use as a reference for future events. If it's appropriate, consider asking volunteers and participants to complete an evaluation or comment card.
- Show your gratitude.** Remember to send thank-you notes or emails to everyone who volunteered their time or resources to make your event a success.

Need help with your event? Contact UCanGo2 at 405.234.4239 or 866.443.7420 (toll free).

You can also find free college planning, financial aid and financial literacy resources at [UCanGo2.org](http://UCanGo2.org), [OKcollegestart.org](http://OKcollegestart.org), [ReadySetRepay.org](http://ReadySetRepay.org), and [OklahomaMoneyMatters.org](http://OklahomaMoneyMatters.org).