



Planning Checklist

IMMEDIATE

- Return signed contract
- Send certificate of insurance - no less than 90 days in advance or immediately upon contracting
- Submit proof of tax exemption (if applicable)
- Establish online registration portal (if contracted)
- Establish Dining/Catering needs
- Establish Housing needs (if applicable)
- Establish Preliminary Audio Visual needs (if applicable)
- Schedule budget planning meeting for event (if contracted)
- Schedule marketing services planning meeting (if contracted)

120 DAYS TO EVENT

- Launch online registration portal (if contracted)
- Determine procurement needs and place order (if contracted)
- Begin menu planning
- Determine if tent, tables and chairs, staging, lighting are needed
- Determine if bar service is needed

45 DAYS TO EVENT

- Provide printing needs - (i.e., posters, abstracts, banners, nametags, etc.) •
Confirm meeting room reservations, setups and technology needs • Provide
hybrid meeting needs to secure Zoom kits

30 DAYS TO EVENT

- Submit final menu selection and meal guarantees
- Submit table linen
- Submit final request for bar service
- Submit estimated Housing roster
- Provide pre-event COVID-19 Protocol forms
- Confirm final meeting room reservations, setups and technology needs •
 - Easels, pads, markers, etc.
 - Podium, microphones, projectors, screens, zoom, IT attendants, etc.

14 DAYS TO EVENT

- Submit final event agenda
- Submit final meal guarantee number - any additional numbers added after 14 days are subject to late fees
- Submit final housing roster (if applicable) - any additional numbers added after 14 days are subject to late fees
- Finalize meeting room attendance numbers
- Supply registered attendees with arrival information (provided to planner by UMaine team): •
 - Parking Permit
 - Driving Instructions
 - Wi-Fi Instructions

5 - 10 DAYS POST-EVENT

- Secure dates for future event(s)
- Schedule event wrap-up
- Review final invoice
- Remit full payment for invoice