**Event Management Checklist**

**15 Weeks Prior**

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| **Task** | **Comments** | **Completed** |
| Convene committee for pre-planning meeting |  |  |
| Determine goals and purpose of event | * Who is your target audience for the event? * What are you learning objectives, if applicable? * What do you hope to accomplish? |  |
| Select date and time | * Ensure hosts, VIPs and/or speakers are available for specified dates (work via admin assistants with the Carnegie executive request form) * Determine if VIP’s spouse will be invited and ensure he/she can attend * Consult campus calendar/religious calendars when selecting * Think of campus culture/workday schedule when selecting times |  |
| Set budget |  |  |
| Research potential funding sources |  |  |
| Select and reserve venue | Remember to review:   * A/V capabilities * Parking availability/restrictions * Maximum capacities * Other events occurring near space – will they conflict? * Accessibility – how will persons with disabilities enter the venue? * Access times to space * Load-in/delivery capabilities * Included equipment with room rental * Surrounding sound impediments * Security issues * Facilities and Event Coordinator contacts sign any contracts |  |
| Schedule rain plan, if applicable | * Select venue * Determine who will make the rain plan call * Determine how and when you will communicate the rain location to your guests * As soon as rain plan is established, consider additional needs to accommodate the plan (i.e. different staff, vendors, rental equipment, etc.) |  |
| Determine guest list | * Confirm any special needs |  |
| Investigate needs for special permits, licenses, insurance, etc. |  |  |
| Research potential vendors | * Use only Georgia Tech approved caterers or vendors * When selecting a new vendor for an expense over $10,000, begin the open bid process |  |
| Create and distribute production schedule for any design elements | * Remember to include all print, web, social media, collateral, signage, and online elements |  |

**12 Weeks Prior**

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| **Task** | **Comments** | **Completed** |
| Update any website material | * Include accessibility information and resources, in addition to ensuring the site is accessible |  |
| Contact (or schedule) GTPD | * Complete a Request for Special Event Security Form from GTPD website * Make a safety & emergency preparedness plan |  |
| Add event to campus calendar and discuss other internal promotion opportunities | * Consider The Whistle, Daily Digest, Technique, etc. |  |
| Contact Parking & Transportation | * Michelle Williams (if on-campus) * Ensure transportation options are accessible for guests |  |
| Create timeline and delegate duties |  |  |
| Plan for live web stream | * Who is coordinating? * Where will the webcast run on the website? * Who will write copy for the site? * When will the site go live? * How will you communicate the webcast to your guests/audience? * Where will the video be archived afterward? * Who will caption the video? * Can you run analytics afterward? If so, do for assessment purposes |  |
| Schedule photographer | * Consult Institute Communications for options |  |
| Schedule videographer | * Consult Institute Communications for options |  |
| Select designer/printer | * In-house or outsource? |  |
| Set marketing/PR schedule |  |  |
| Order/design Save-the-Date cards or  emails |  |  |
| Determine if large-scale promotional items will need to be designed and made (i.e. large signs, posters, etc.) |  |  |
| Secure mailing house if you are to send out Save-the Dates |  |  |
| Begin researching travel arrangements and hotel options |  |  |
| Schedule meeting with Event Logistics Committee (ELC) if hosting outdoor event | * Email Sharon Myers |  |

**10 Weeks Prior**

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| **Task** | **Comments** | **Completed** |
| Reserve hotel, plane and travel accommodations for speakers/VIPs and staff, if applicable | * Ensure hotel room blocks have multiple options and are accessible for guests * Thoroughly review hotel contract for attrition clauses |  |
| Secure A/V needs for event | * Lighting * Supplemental video needs * Sound – President Peterson prefers lav mic. Ensure you have wireless advancer, if using ppt and LCD projector/screen available * Coordinate additional mics in the audience for any Q&A needs * Ensure you have on-site A/V tech for event |  |
| Design and create/order invitations |  |  |
| Select & book caterer | * Do any of your guests have dietary needs? * Remember vegetarian options * Determine VIP’s F&B preferences * Will you need linens from the caterer or other rental company? * Remember waters for the podium and/or bottled for guests, if applicable * Gain approval from President or other host, if applicable |  |
| Secure entertainment/musicians | * President Peterson prefers to incorporate as many students as possible in musical performances * Think about all aspects of the event (guest arrival, duration of event, etc.) |  |
| Begin designing printed pieces (i.e. invitations, tickets, flyers, programs, pamphlets, out-of-town guest booklets, etc.) |  |  |
| Develop press release and calendar listings |  |  |
| Develop communication plan/schedule | * Determine what and when communications will be sent * For social media help/questions, contact Institute Communications |  |
| Request and receive speakers’/VIPs’ bios | * Ask for photo if included in program – high res jpeg |  |
| Send Save-the-Dates |  |  |
| Order plants/flowers | * Remember rental plants for staging and all floral needs |  |
| Schedule President’s Podium | * For official Institute events, use President’s podium – Brandon Ford |  |
| Coordinate meeting with Fire Marshal | * Email Larry Labbe |  |
| Schedule supplemental staffing | * Ushers, crowd management, etc. |  |
| Order radios | * Atlanta Communications |  |
| Send preliminary volunteer requests | * Student Ambassadors are great resources |  |
| Request participation of additional speakers | * Emcees, presenters, etc. * Always have someone introduce the President or other VIP |  |
| Order additional décor materials | * Carpeting * Balloons * Pipe and Drape |  |
| Reserve additional set-up materials | * Rental chairs * Stage * Podiums * Tables * Easels * Coat racks * Heat lamps |  |
| Complete/submit Event Details | * Send to the admin whom you sent the Carnegie Executive Request form. Due no later than 5 weeks out. |  |

**8 Weeks Prior**

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| **Task** | Comments | **Completed** |
| Review printed materials with your designer |  |  |
| Set menu with caterer – know that you can confirm the final head count approx. a week prior to the event | * Ask if there’s a surcharge for late additions |  |
| Secure permits and insurance |  |  |
| Determine if awards/trophies will be given and research companies |  |  |
| Release press announcements to national and local print media | * Work with Lance Wallace in Institute Communications to coordinate |  |
| Order any giveaways | * Visit the Licensing and Trademarks website for policies |  |
| Arrange for transportation (buses, shuttles) if necessary |  |  |
| Determine parking and obtain directional maps for visitors to include with invitation |  |  |
| Confirm accessibility resources | * CART Transcription, ASL Interpreter, etc. * Ensure you have an operational plan in place for assisting those with disabilities and that volunteers are fully briefed on plan * Contact AMAC for assistance |  |
| Order speakers’ gifts |  |  |
| Request Tech traditional aspects | * Buzz * Ramblin’ Wreck * Cheerleaders * Band |  |
| Begin editing printed programs/materials |  |  |
| Schedule A/V run-through the day before the event | * Determine if President Peterson would like to participate |  |
| Secure Green Room | * President Peterson prefers to be close to other members of the event, if they are convening elsewhere |  |

**6 Weeks Prior**

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| **Task** | **Comments** | **Completed** |
| Assemble/address invitations |  |  |
| Create RSVP tracking system |  |  |
| Mail invitations | * Set RSVP 1.5-2 weeks (at minimum 1 week) prior to event date |  |
| Order awards |  |  |
| Distribute flyers/emails advertising event |  |  |
| Finalize transportation logistics for VIPs and out-of-town guests |  |  |
| Release press announcements to local TV, radio media |  |  |
| Determine if signage needs to be produced – if out-of-house, order signage and large promotional materials |  |  |
| Hold walk-through with major stakeholders/committee members to ensure all needs are met |  |  |
| Secure musicians/entertainers sound check |  |  |
| Determine liquor needs, if any |  |  |
| Order liquor | * Complete Alcohol Prior Approval Request Form |  |
| Purchase all needed decorations, other than flower arrangements |  |  |
| Begin making decorations, if need be |  |  |
| Order extra trash receptacles | * Cheryl Taylor |  |
| Order extra recycling bins | * Complete Special Event Recycling Request |  |

**4 Weeks Prior**

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| **Task** | **Comments** | **Completed** |
| Place local print ads and watch for media hits |  |  |
| Confirm staff/volunteers for each aspect of the event |  |  |
| Make parking and directional signs that can be created in-house |  |  |
| Create welcome packets/materials for attendees |  |  |
| Create script for yourself or for VIPs/presenters | * Work with Patti Futrell for Dr. Peterson * For President and other VIPs, clearly mark each time they will speak with dividers in the script book * Request scripts from all participants with a talking role so you can create a complete script book and ensure that speakers are not redundant * President prefers top right corner to be crumpled, so the pages turn better * Include phonetic spellings for any individuals’ names that might be difficult to pronounce |  |
| Confirm all travel arrangements |  |  |
| Confirm security needs and plan walk-through of site with them |  |  |
| Coordinate with accounts payable and vendors on when payment will be received (in most cases, unless you purchase alcohol, after services are rendered) |  |  |
| Schedule volunteer training |  |  |

**1-2 Week(s) Prior**

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| **Task** | **Comments** | **Completed** |
| Follow-up with RSVP list – make personalized phone calls & emails, if necessary |  |  |
| Send final numbers to the caterer |  |  |
| Confirm participation with all VIPs/presenters. Send them updated event details, run of shows, and talking points. |  |  |
| Set meeting to brief President | * Brief him on updated attendee list |  |
| Create seating plans and room diagrams for assistance with set-up and day-of-event questions |  |  |
| Develop photo shoot list |  |  |
| Hold pre-event meeting with all significant stakeholders (vendors, managers of venue, key committee members and volunteers, etc.) |  |  |
| Do one last walk-through of venue |  |  |
| Hold training session with volunteers |  |  |
| Ensure all printed materials/collateral are assembled and correct |  |  |
| Make follow-up calls to media |  |  |
| Make nametags/lanyards of attendees and extra plain ones for surprise guests | * Suggest Avery 8395 * Preferred template – Arial Bold, First name centered 54 pt; last name underneath in 48 pt * Consider purchasing machine for onsite nametags |  |
| Create “Event Day Survival Kit” full of needed items: pens, sharpies, tape, scissors, etc. |  |  |
| Create detailed hour-by-hour event agenda (event plan) for key volunteers/vendors and distribute to them |  |  |
| Confirm set-up/breakdown with all vendors |  |  |
| Send final information to participants, including directions, maps, last minute details, etc. |  |  |
| Create volunteer duty form |  |  |
| Wrap gifts |  |  |
| Distribute parking passes |  |  |
| Send completed Run of Show and RSVP list within 72 hrs of event to VIPs |  |  |

**1-2 Days Prior**

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| **Task** | **Comments** | **Completed** |
| Create final to-do list to determine all tasks are complete |  |  |
| Ensure all appropriate contacts’ info is listed where you can easily retrieve it |  |  |
| Purchase floral arrangements if not provided by vendor |  |  |
| Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc. |  |  |
| Reconfirm schedule with caterer |  |  |
| Set-up registration area, if possible, so you are prepared for the next day |  |  |
| Decorate room if you can |  |  |
| Display parking/directional signs |  |  |
| Lay out clothes and needed materials (name badge, notebook, etc.) |  |  |
| Pick up liquor or have it couriered |  |  |
| Deliver materials/equipment to venue site |  |  |
| Test webstreaming |  |  |
| Be prepared to troubleshoot changes day-of | * 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. |  |
| Discuss rain plan logistics |  |  |

**Day of Event**

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| **Task** | **Comments** | **Completed** |
| Arrive early and do one last walk-through |  |  |
| Oversee vendor set-up |  |  |
| Ensure all VIP materials are correctly labeled and in place | * Provide a program to President and VIPs so they know speaking order |  |
| Check all set-ups |  |  |
| Ensure waters are in podium |  |  |

**Up to a Week After Event**

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| **Task** | **Comments** | **Completed** |
| Send thank you notes |  |  |
| Handle invoices |  |  |
| Hold post-event meeting with key players to evaluate event | * Complete a post-event evaluation to record your ideas and lessons learned |  |
| Send pictures/mementos to VIP guests |  |  |
| Pack up and inventory all materials |  |  |
| Update website |  |  |
| Book next year’s venue, for annual event |  |  |
| Complete survey of event or any product/service provided |  |  |