**Event Management Checklist**

**15 Weeks Prior**

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| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Determine goals and purpose of event  | * Who is your target audience for the event?
* What are your learning objectives, if applicable?
* What are your key messages?
* What do you hope to accomplish?
* How will you gauge effectiveness?
* How does this event complement the Strategic Plan?
 |  |
| 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 they can attend
* Consult campus calendar/religious calendars when selecting
* Think of campus culture/workday schedule when selecting times
 |  |
| Set budget | * Research potential funding sources such as partnering with other departments
* Use our budget template available at specialevents.gatech.edu/resources/guide/templates
 |  |
| 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
 |  |
| Schedule rain plan, if applicable | * Select venue
* Determine who will make the rain plan call and when you will make your final decision
* Speak with vendors about refund and cancelation policy costs and deadlines
* Determine how and when you will communicate the rain location to your guests
* Consider additional needs such as different staff, rental equipment, etc.
 |  |
| Determine guest list | * Consider your target audience and key messages
* When possible, research similar past events to determine RSVP melt
 |  |
| Ensure inclusivity, accessibility, and sustainability | * Consult with the ADA’s guide on temporary events
* Consult the Green Event Guide from Campus Sustainability
 |  |
| Investigate needs for special permits, licenses, insurance, etc. |  |  |
| Research potential vendors  | * Use only Georgia Tech approved caterers or vendors
* Review Georgia Tech policies regarding contracts, procurement, and RFPs
 |  |
| Develop a production schedule for any design elements | * Include items like your program, flyers, website graphics, and signage
* Determine deadlines to send items to printers to receive materials on time
 |  |
| Determine meeting schedule for your committee | * Create a reoccurring calendar appointment
 |  |

**12 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Develop a communications plan | * What is your event’s main message?
* What media reaches your target audience?
* Determine what channels to advertise and when is the best time to send messages.
* Consult with Institute Communications for advise and inspiration.
 |  |
| Update any website material | * Include common guest questions such as parking, dress code, and program schedule
* Ensure the website offers accessible features like alt text in images and [proper color contrasts](https://webaim.org/resources/contrastchecker/)
 |  |
| Contact (or schedule) GTPD | * Review services and complete a [Request for Special Events Security form](https://police.gatech.edu/special-operations-division)
 |  |
| Add event to campus calendar and discuss other internal promotion opportunities | * Consider The Whistle, Daily Digest, Technique, etc.
 |  |
| Contact Parking & Transportation | * Review information about [event parking and transportation options](https://pts.gatech.edu/event-parking-rental-services)
 |  |
| Determine if you will live stream your event  | * 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 stream live?
* Can you run analytics afterward? If so, do for assessment purposes
 |  |
| Schedule photographer, if needed |  |  |
| Schedule videographer, if needed |  |  |
| Select designer/printer |  |  |
| Order/design save-the-date cards or emails |  |  |
| 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) |  |  |

**10 Weeks Prior**

|  |  |  |
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| **Task** | **Comments** | **Completed** |
| Reserve hotel, plane, and travel accommodations for speakers/VIPs and staff, if applicable  | * Consider requesting a hotel block if a large portion of your attendees are traveling
 |  |
| Secure A/V needs for event  | * Lighting
* Supplemental video needs
* Sound –
* Ensure you have wireless advancer, if using ppt and LCD projector/screen
* Coordinate additional mics in the audience for any Q&A needs
* Ensure you have on-site A/V tech for event
* Confidence monitors for speakers
 |  |
| Design and create/order invitations | * Confirm a way to ask guests about any accommodation requests such as ADA access or dietary needs
 |  |
| Select & book caterer | * Do any of your guests have dietary restrictions?
* 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 | * Consult with Institute Relations for tips and recommendations
 |  |
| 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 |  |  |
| Schedule supplemental staffing | * Ushers, crowd management, etc.
 |  |
| 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 | * Flowers
* Balloons
* Pipe and Drape
 |  |
| Reserve additional set-up materials | * Rental chairs
* Stage
* Podiums
* Tables
* Easels
* Coat rack
* 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 closer to the event |  |  |
| 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 your media contact in Institute Relations to coordinate
 |  |
| Order any giveaways | * Visit Licensing and Trademarks for official policies
* Consider partnering with other departments to share costs
* Do not include a date, if possible, so items can be reused
 |  |
| Arrange for transportation (buses, shuttles) if necessary | * Visit [Parking and Transportation](https://pts.gatech.edu/event-parking-rental-services) for resources
 |  |
| Determine parking for visitors  | * Direct guests to the campus map for directions
 |  |
| Confirm accessibility resources | * CART Transcription
* ASL Interpreter
* Ensure you have an operational plan in place for assisting those with disabilities and that volunteers are fully briefed on plan
* Contact the [Center for Inclusive Design and Innovation](https://cidi.gatech.edu) 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 | * 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)
 |  |

**6 Weeks Prior**

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| **Task** | **Comments** | **Completed** |
| Assemble/address invitations  |  |  |
| Create RSVP tracking system | * Confirm a way to ask guests about any accommodation requests such as ADA access or dietary needs
 |  |
| Mail invitations | * Set RSVP 1.5-2 weeks (at minimum 1 week) prior to event date
* Update website with RSVP information
 |  |
| 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 |  |  |
| Hold walk-through with major stakeholders/committee members to ensure all needs are met |  |  |
| Secure musicians/entertainers | * Determine if any sound checks are necessary
 |  |
| Determine alcohol needs, if any | * Review the information about alcohol on the [Food & Catering](https://specialevents.gatech.edu/resources/catering/companies) web page
 |  |
| Order liquor |  |  |
| Purchase all needed decorations |  |  |
| Begin making decorations, if need be |  |  |
| Order extra trash receptacles | Email [Ebony Cunningham](file:///Users/temp/Downloads/ecunningham33%40gatech.edu) |  |
| Order extra recycling bins | Complete [Special Event Recycling Request](http://www.recycle.gatech.edu/recycling_services/Special_Events/index.php) |  |

**4 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Make a safety and emergency preparedness plan |  |  |
| 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 the Organization, Academic and Research Communications within Institute Communications for any talking points for the president or executive leadership team
* Clearly mark each speaker change with dividers in the script book
* Request scripts from all participants with a talking role to create a complete script book and ensure that speakers are not redundant
* 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 |  |  |

**2 – 1 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 show, and talking points.  |  |  |
| Create seating plans and room diagrams for assistance with set-up and day-of-event questions | * Ensure you follow correct protocol for head table seating
* Create place cards for seated, if needed
* Ensure you have back-up seating options available for changes within head table seating arrangements
 |  |
| 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/collaterals are assembled and correct |  |  |
| Make follow-up calls to media  |  |  |
| Make nametags/lanyards for attendees and extra plain ones for surprise guests | * Suggest magnetic/reusable with clip tags for those who are unable to use magnetic
* If disposable, suggest Avery 8395
* Preferred template – Arial Bold, first name centered 54 pt; last name underneath in 48 pt
* Create two nametags for name variations (i.e. Joseph and Joe)
* 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.  | * [Find templates on the Special Events website](https://specialevents.gatech.edu/resources/guide/templates)
 |  |
| Create volunteer duty form | * [Find templates on the Special Events website](https://specialevents.gatech.edu/resources/guide/templates)
 |  |
| Wrap gifts |  |  |
| Distribute parking passes  |  |  |
| Send completed Run of Show and RSVP list to VIPs |  |  |

**1-2 Days Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Create final to-do list to determine all tasks are complete |  |  |
| Ensure all appropriate contacts’ information is listed where you can easily retrieve it  | * Recommend they are added to your phone for easy texting capabilities on event day
 |  |
| 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 |  |  |
| Gather all 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**

|  |  |  |
| --- | --- | --- |
| **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**

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