## 

**Event Planning Checklist**

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| --- | --- | --- | --- | --- | --- |
| **AS EARLY AS POSSIBLE** | | | | |  |
| **Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** | **Point Person** |
| Coordinate dates and secure speakers  (Check with OCD, OSE, UC and the Dean’s Office for any conflicts) |  |  |  |  |  |
| Submit [room reservation requests online](https://virtualems.stern.nyu.edu/) (Spaces for main event, reception, green room, overflow/simulcast room, break-out sessions, etc., as needed) |  |  |  |  |  |
| Touch base with your department or center’s consultant in the Special Events Office. Find your Special Events Consultant online [here](http://www.stern.nyu.edu/portal-partners/special-events/event-consultants). Notify Public Affairs. |  |  |  |  |  |
| Establish clear goals, audiences and objectives – What does success look like? |  |  |  |  |  |
| Ensure that Stern is not merely a venue but also a critical participant in the event program/agenda. What is the value to Stern? |  |  |  |  |  |
| Request bio & photo of speaker(s) and share with Public Affairs |  |  |  |  |  |
| Design invitation   *Tips for invite:*   * *Contact Public Affairs, who can provide you with templates and Stern-branded headers* * *Include speakers, topic, date, time, location, link to RSVP, hosts/sponsors* * *Include photos (if possible)* * *Consider including language:  “RSVPs are required.  “Seating is limited and available on a first-come, first-served basis.  “This electronic invitation is not transferable.”* * *Include information about food/drink (if applicable)* * *Include info about social media (i.e., Twitter handle & hashtag), if applicable* |  |  |  |  |  |
| Develop online RSVP page  *Tips for RSVP page*   * *Include FN, LN, e-mail, School & Program (i.e., full-time MBA, undergraduate, global degree, etc.)* * *Generate automatic confirmation e-mail* * *Test the RSVP page from the Stern network and from outside the Stern network*   \*Consider using [Qualtrics](https://sso.stern.nyu.edu/idp/startSSO.ping?PartnerSpId=sso.stern.nyu.edu&TargetResource=http%3A%2F%2Fw3.stern.nyu.edu%2Fsimon%2Fsso_qualtrics.html) (Survey @Stern) for RSVP forms |  |  |  |  |  |
| Determine budget for the event and who is paying *\*Be sure to consider additional costs for security and building services (including overtime)* |  |  |  |  |  |
| Evaluate room capacity and discuss target # for RSVPs.   \*REMEMBER: Free events at Stern typically see ***more than*** a 50% drop-off and sometimes as large as an 85% melt. |  |  |  |  |  |
| **6-8 WEEKS PRIOR TO EVENT** | | | | |  |
| **Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |  |
| Post event info on Center/Department website |  |  |  |  |  |
| Work with Public Affairs to highlight your event on the Stern website (“[Upcoming Events](http://www.stern.nyu.edu/experience-stern/news-events/events/index.htm?show=upcoming)” page) and social media platforms (Facebook & Twitter) |  |  |  |  |  |
| Determine whether or not press will be invited to your event. Please confirm level of comfort with all speakers before inviting press. Work with Public Affairs to develop a PR strategy and conduct media outreach (if applicable) |  |  |  |  |  |
| Distribute invitation (remember to BCC). Consider the following audiences:   * Undergraduate students – Invitations are handled through UC’s STERNews e-newsletter; contact Keith Miller * Full-time MBA students * Langone MBA students * PhD students * Executive MBA students – invitations are handled through EMBA Office; contact MJ Boland and Janet Vitebsky * Global Degree Program students – invitations handled through Global Programs Office; contact Erin O’Brien and Roy Lee * Alumni – invitations are handled through DART; contact Angela Parks & Jordan Curry * Boards – invitations are handled through the Dean’s Office & DART; contact Anna Davitt, Tara Wadhwa, Angela Parks & Sarah Marchitto * Faculty * Staff & Administration * University Leadership Team – invitations handled through Dean’s Office; contact Anna Davitt   Consider sending the invitation from a name/e-mail that recipients will recognize.  Conduct a test of your invitation with multiple reviewers before sending it. Check all links, photos and content, including the subject line, before sending. |  |  |  |  |  |
| Consider promoting event through MBA Announce e-newsletter. Contact the Office of Student Engagement for more info. |  |  |  |  |  |
| Monitor RSVPs closely |  |  |  |  |  |
| Secure Stern representative to handle introductions. Contact Anna Davitt in the Dean’s Office for Dean Henry’s availability. |  |  |  |  |  |
| Submit requests for room set-up, catering, flowers, coat racks, easels, trash cans, elevators, registration area, etc. via [EMS](https://virtualems.stern.nyu.edu/) |  |  |  |  |  |
| Submit requests for A/V support, including microphones for speakers and Q&A, simulcast room, wireless login for guests, etc. via [EMS](https://virtualems.stern.nyu.edu/) |  |  |  |  |  |
| Book a photographer from NYU’s [Photo Bureau](http://www.nyu.edu/about/leadership-university-administration/office-of-the-president/university-relationsandpublicaffairs/public-affairs/photo-bureau.html). Recommended photographers:   * Mathieu Asselin * Sam Hollenshead * Don Pollard * Elena Olivio * Dan Creighton * Phil Gallo   (please notify Public Affairs when booking a photographer) |  |  |  |  |  |
| Book a video team:   * NYU TV (also provides Live Webcast capabilities) – Fill out [online form](http://www.nyu.edu/tv.media/tv.center/request.html) & contact Toni Urbano * FOR A.tv * Freelancer   (Consult Public Affairs when choosing a video resource for your event) |  |  |  |  |  |
| Send speakers a photo/video release form. Please contact Public Affairs for a sample. |  |  |  |  |  |
| Design programs (if needed) |  |  |  |  |  |
| Obtain gift(s) for speaker(s), if applicable |  |  |  |  |  |
| **4 WEEKS PRIOR TO EVENT** | | | | |  |
| **Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |  |
| Send out invitation blast #2 |  |  |  |  |  |
| Coordinate planning call with speakers and event contacts to discuss run-of-show, objectives, format, etc. |  |  |  |  |  |
| Notify NYU’s Office of Public Safety ([contactcsc@nyu.edu](mailto:contactcsc@nyu.edu)) and Stern’s Building Manager Mitchell Yaven if you have special security needs and/or your event features a high-profile speaker. |  |  |  |  |  |
| **2 WEEKS PRIOR TO EVENT** | | | | |  |
| **Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |  |
| Send out invitation blast #3 |  |  |  |  |  |
| Evaluate RSVPs – do you need to cast a wider net or consider changing rooms? |  |  |  |  |  |
| Print programs (if needed) |  |  |  |  |  |
| Send timeline and event details to speakers |  |  |  |  |  |
| Prepare introductory remarks for Stern representative to welcome attendees, present speakers, describe format and share ground-rules (if applicable) |  |  |  |  |  |
| Approve/adjust catering menu (if applicable) |  |  |  |  |  |
| **1 WEEK PRIOR TO EVENT** | | | | |  |
| Send out invitation blast #4 |  |  |  |  |  |
| Print and organize name cards (if needed) |  |  |  |  |  |
| Send introductory remarks to Stern representative (send to Anna Davitt if Dean Henry is participating) |  |  |  |  |  |
| Send DART a list of alumni who RSVP’d  (if applicable) |  |  |  |  |  |
| Coordinate staffing for registration, ushering, mic passers for audience Q&A, set-up, VIP greeting, etc. |  |  |  |  |  |
| Touch base with Special Events, Public Affairs and IT on RSVPs, catering, branding, photography & video, social media, A/V needs + |  |  |  |  |  |
| Confirm photographer and/or video team |  |  |  |  |  |
| Print signs for registration desk & VIP reserved seats (as needed) |  |  |  |  |  |
| **DAY OF EVENT** | | | | |  |
| **Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |  |
| Leave memo about event, including cell # of event contact and full list of guests, with security desks in the lobby of KMC, Shimkin & Tisch |  |  |  |  |  |
| Send out event reminder to guests who RSVP’d |  |  |  |  |  |
| Check that meters & VIP escorts are in place |  |  |  |  |  |
| Be prepared to troubleshoot on-site |  |  |  |  |  |
| Check event space set-up at least one hour prior to start time. Please note temperature and cleanliness of room. |  |  |  |  |  |
| Bring speaker gift to event space (if applicable) |  |  |  |  |  |
| Set out bottled water for speakers in the event space |  |  |  |  |  |
| Post “Notice of Video/Photography” on easels outside entrances to event (Public Affairs has signs & language available) |  |  |  |  |  |
| Place reserved signs in front rows for VIP seats |  |  |  |  |  |
| Print copies of the RSVP list for the registration table |  |  |  |  |  |
| Set-up Stern branding in the event space. For events in Paulson Auditorium, use existing drop-down banners.  (Mobile step & repeal banners are available from Public Affairs) |  |  |  |  |  |
| Get signature from speakers on photo/video release if you did not get this in advance |  |  |  |  |  |
| Close the online registration page |  |  |  |  |  |
| **POST EVENT** | | | | |  |
| **Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |  |
| Write and send thank you notes to speakers and volunteers/staff |  |  |  |  |  |
| Share photos, video and signed release forms with Public Affairs |  |  |  |  |  |
| Partner with Public Affairs on post-event coverage for Stern website, social media platforms and lobby screens (as needed) |  |  |  |  |  |
| Save final attendee list and share with DART. Send final attendee #s, as compared to # of RSVPs, to Special Events and Public Affairs |  |  |  |  |  |
| Trap “Lessons Learned” for next event |  |  |  |  |  |
| Provide feedback to your consultant in the Special Events Office |  |  |  |  |  |