##

**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) 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 | [ ]  | [ ]  | [ ]  |  |  |