

Event Planning Checklist

AS EARLY AS POSSIBLE					
Checklist Items	Yes	No	Not Required	Comments	Point Person
Coordinate dates and secure speakers (Check with CSLDCR, OSE, UC and the Dean's Office for any conflicts)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submit room reservation requests online via EMS (Spaces for main event, reception, green room, overflow/simulcast room, break-out sessions, etc., as needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Touch base with your department or center's consultant in the Special Events Office. Notify Public Affairs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Establish clear goals, audiences and objectives – What does success look like?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ensure that Stern is not merely a venue but also a critical participant in the event program/agenda. What is the value to Stern?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Request bio & photo of speaker(s) and share with Public Affairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ensure your announcements and invitations include an accommodation statement that provides instructions on how to request disability-related accommodations for the event. The statement should be clear and easy to find on both print and online materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

<p>Design invitation</p> <p><i>Tips for invite:</i></p> <ul style="list-style-type: none"> • Contact Public Affairs, who can provide you with templates and Stern-branded headers • Include speakers, topic, date, time, location, link to RSVP, hosts/sponsors <input type="checkbox"/> • Include photos (if possible) <input type="checkbox"/> • 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 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
--	--------------------------	--------------------------	--------------------------	--	--

<p>Develop online RSVP page</p> <p><i>Tips for RSVP page</i></p> <ul style="list-style-type: none"> • 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 <p>*Consider using Qualtrics (Survey @Stern) for RSVP forms</p> <p>**"Google Forms" is another tool for creating RSVP forms.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Determine budget for the event and who is paying</p> <p><i>*Be sure to consider additional costs for security and building services (including overtime)</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Connect with the Budget Office about event-specific account codes for both expenses and potential ticket revenues.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Evaluate room capacity and discuss target # for RSVPs.</p> <p>*REMEMBER: Free events at Stern typically see more than a 50% drop-off and sometimes as large as an 85% melt.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

6-8 WEEKS PRIOR TO EVENT

Checklist Items	Yes	No	Not Required	Comments	
Post event info on Center/Department website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Work with Public Affairs to highlight your event on the Stern website (" Upcoming Events " page) and social media platforms (Facebook & Twitter)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
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)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

<p>Distribute invitation (remember to BCC). Consider the following audiences:</p> <ul style="list-style-type: none"> • Undergraduate students – Invitations are handled through UC's STERN Weekly Newsletter • Full-time MBA students • Part-Time MBA students • Fashion & Luxury MBA students • Tech MBA students • Executive MBA – New York students • Executive MBA – D. C students • M.S. in Accounting students • M.S. in Data Analytics and Business Computing students • M.S. in Quantitative Finance students • M.S. in Business Analytics students • M.S. in Global Finance students • M.S. in Risk Management students • TRIUM Global Executive MBA students • PhD students • Alumni – invitations are handled through DART • Boards – invitations are handled through the Dean's Office & DART • Faculty • Staff & Administration • University Leadership Team – invitations handled through Dean's Office <p>Consider sending the invitation from a name/e-mail that recipients will recognize.</p> <p>Conduct a test of your invitation with multiple reviewers before sending it. Check all links, photos and content, including the subject line, before sending.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
<p>Monitor RSVPs closely</p>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Secure Stern representative to handle introductions.</p>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Submit catering and room set up requests through EMS</p>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Submit CETG requests in EMS (A/V support, microphones for speakers and Q&A, simulcast room)</p>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Book a photographer from NYU's Photo Bureau. (please notify Public Affairs when booking a photographer)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

<p>Book a video team:</p> <ul style="list-style-type: none"> • Stern Studio – Online form and information • NYU TV (also provides Live Webcast capabilities) – Fill out online form & contact Toni Urbano • FOR A.tv • Freelancer <p>(Consult Public Affairs when choosing a video resource for your event)</p> <p><i>Note: Per NYU guidelines, all online materials must be ADA compliant, including videos. Please ensure video captioning with your video source and test it prior to posting videos publicly.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send speakers a photo/video release form. Please contact Public Affairs for a sample.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Design programs (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Obtain gift(s) for speaker(s), if applicable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4 WEEKS PRIOR TO EVENT					
Checklist Items	Yes	No	Not Required	Comments	
Send out invitation blast #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coordinate planning call with speakers and event contacts to discuss run-of-show, objectives, format, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

<p>Promote your event on digital signage at Stern:</p> <p>1. KMC & Shimkin Lobbies -- Bottom Half of Pillar Screens (Way-Finding): To display way-finding information (e.g., event title, date, time + room), submit to this Google form at least three business days prior to your event. This content will display on the day of the event only. If you have any questions about the way-finding screens, please email Public Affairs at paffairs@stern.nyu.edu for assistance.</p> <p>2. KMC & Shimkin Lobbies -- Top Half of Pillar Screens (Spotlight on Upcoming Events): To spotlight an upcoming event, submit via Scala, Stern's digital content management system: https://nyu.zero-in.com/ContentManager. Please submit as early as possible. This content will display two weeks prior to your event. If you do not know who in your department has access to Scala or your need access, please email Public Affairs at paffairs@stern.nyu.edu for assistance.</p> <p>3. Tisch Hall Screens (Lobby and Floors 2 & 3) If you have an event you want to include on the daily list that appears on the screens on Tisch Hall Floors 1-2-3 and the Stern Weekly e-newsletter, please fill out this form. To request your own promotional slide for an event (pending space availability), reach out to the Undergraduate College Communications Team at comms@stern.nyu.edu. All submissions must be received by Tuesday at 5pm for the following week. Please note: these screens are not active in the summer.</p> <p>*Please Note: Screens by the KMC elevator bay are fueled by existing content from the Experience Stern website.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Consult with NYU's Moses Center for Students with Disabilities on any accommodation requests and accessibility best practices for events: mosescsd@nyu.edu.</p> <p><i>*Please note that the Moses Center will help field student and non-student (faculty, alumni, parent, external guest) requests.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>Notify NYU's Office of Public Safety if you have special security needs and/or your event features a high-profile speaker.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

2 WEEKS PRIOR TO EVENT

Checklist Items	Yes	No	Not Required	Comments	
Send out invitation blast #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Evaluate RSVPs – do you need to cast a wider net or consider changing rooms?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print programs (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send timeline and event details to speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Prepare introductory remarks for Stern representative to welcome attendees, present speakers, describe format and share ground-rules (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Approve/adjust catering menu (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

1 WEEK PRIOR TO EVENT

Send out invitation blast #4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print and organize name cards (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send introductory remarks to Stern representative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send DART a list of alumni who RSVP'd (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coordinate staffing for registration, ushering, mic passers for audience Q&A, set-up, VIP greeting, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Touch base with Special Events, Public Affairs and IT on RSVPs, catering, branding, photography & video, social media, A/V needs +	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Confirm photographer and/or video team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print signs for registration desk & VIP reserved seats (as needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send security list of external guests (no NYU IDs) in alpha order to Office of Public Safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send out event reminder to guests who RSVP'd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Check that greeters & VIP escorts are in place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Be prepared to troubleshoot on-site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Check event space set-up at least one hour prior to start time. Please note temperature and cleanliness of room.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Bring speaker gift to event space (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Set out bottled water for speakers in the event space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Post "Notice of Video/Photography" on easels outside entrances to event (Public Affairs has signs & language available)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Place reserved signs in front rows for VIP seats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print copies of the RSVP list for the registration table	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Set-up Stern branding in the event space. For events in Paulson Auditorium, use existing dropdown banners. (Mobile step & repeat banners, podium signs and Notice of Filming/Photographer signs are available from Public Affairs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Get signature from speakers on photo/video release if you did not get this in advance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Close the online registration page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
POST EVENT					
Checklist Items	Yes	No	Not Required	Comments	
Write and send thank you notes to speakers and volunteers/staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Share photos, video and signed release forms with Public Affairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Partner with Public Affairs on post-event coverage for Stern website, social media platforms and lobby screens (as needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Partner with video resource on video captioning prior to video distribution/publication.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Save final attendee list and share with DART. Send final attendee #s, as compared to # of RSVPs, to Special Events and Public Affairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Trap "Lessons Learned" for next event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Provide feedback to your consultant in the Special Events Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		