Event Planning Checklist

This checklist is a guide for planning a typical event. For events out of the ordinary, be sure to consider any special needs that may not be listed here.

❖ Event Oversight

☐ Identify an event manager.
  *The person who will plan the event and arrange for funding, including co-sponsorship requests (often a faculty member or administrator).

☐ Identify an event coordinator.
  *The one person responsible for coordinating event logistics and service needs.

❖ Event Size & Scope

☐ If you are organizing a live performance or your event is expected to draw more than 200 people, **contact the Department of Event Management (DEM) before beginning your planning process!**

❖ Budget

☐ Develop a budget (see event budget planning worksheet).
  *Discuss current rates and fees with individual service providers.*

☐ Identify sources of funding & obtain the Banner Index for each source.
  *(Student Organizations, please contact the Student Activities Office. Students, please contact your Commons Coordinator.)*

❖ Scheduling

☐ Identify preferred dates for the event.
  *Consider the purpose of the event and the target audience.
    *What date & time will best draw that audience?*
  *Identify dates your guest lecturer/performer is available.*
  *Review the online Calendar of Events at [http://www.middlebury.edu/events](http://www.middlebury.edu/events) to check for potential conflicts in attracting the intended audience.*
  *Check the Academic Calendar to avoid conflict with annual College events. [http://www.middlebury.edu/academics/calendar/2016-2017](http://www.middlebury.edu/academics/calendar/2016-2017)*

☐ Identify a suitable venue and check for availability.
  *What size & type of room will be required?*
  *Does the space meet your needs for parking, technology, catering, etc.?*
  *If you are unsure which venue is best for your event, simply indicate the type of venue in the “Preferred Location” field when you submit your request. Examples: auditorium, seminar room, classroom.*
Schedule a venue.
- Submit an Event Reservation Request Form online at http://www.middlebury.edu/offices/business/scheduling/forms
  Include all known and possible event needs at this time.
- Please submit a request even if a preferred location has not been identified. The scheduler will assist in determining an appropriate venue. Be sure to reserve any additional venues if necessary for a reception, dinner, break-out spaces, etc. if applicable.
- Alert DEM on the request form if your speaker/performer is a non-U.S. citizen traveling to the U.S. DEM will expedite review of these requests to give you greater lead time (if approved) to begin working with the Tax Office and making travel arrangements.*
- Await confirmation that the date is available and a venue has been reserved. Sometimes there may be high profile events in the planning stages that you would not be aware of. DEM will advise of this and offer alternatives ASAP.

Confirm a date with your visitor and finalize arrangements only after you have received an R25 Event Confirmation:
- Finalize contracts and related paperwork. Consult the Controller’s Office website for details re: Pre-Approved Independent Contractors. http://www.middlebury.edu/offices/administration/vpfin/finance-office/controller/payment/ic
- Make travel arrangements including from and to the airport or train station.
- Reserve a College vehicle, if necessary, to provide ground transportation for the visitor while in Middlebury. http://www.middlebury.edu/offices/business/facilities/veh
- Make lodging reservations.

*Non-U.S. Citizen Presenters/Artists/Lecturers
- Contact Catherine Tobin the Tax Office to determine what visa is appropriate for a visit and what its tax implications are. The correct tax forms must be sent and signed in advance.

Catering
- Place your order with MiddCatering via Catertrax at least 7 days in advance: https://middcatering.catertrax.com/
  Please contact catering@middlebury.edu or Megyn Pitner at x5959 with any catering-related questions.
- You may use a Non-College Caterer only if they are on the approved list: http://www.middlebury.edu/student-life/community-living/dining-services/catering/noncollege
**Event Set up**

- If you are not familiar with the space, please visit the room to assess how your event will flow in that venue.

- Review the details of the Event Confirmation and consider your needs as compared to the venue. Consider possible set-up and equipment needs:

<table>
<thead>
<tr>
<th>Item</th>
<th>Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>tables for catering, registration, panel discussion, book signing, etc.</td>
<td>microphones: for speaker/s? for Q&amp;A? wireless or in a stand? Qty? (Helpdesk)</td>
</tr>
<tr>
<td>chairs for guest speaker/s (type?)</td>
<td>podium</td>
</tr>
<tr>
<td>arrangement of tables/chairs (layout)</td>
<td>room w/ white board</td>
</tr>
<tr>
<td>linens for dining tables (MiddCatering)</td>
<td>easels (specify w/ or without pads)</td>
</tr>
<tr>
<td>blue cloths for registration or panel tables</td>
<td>NOTE: you must BYO markers</td>
</tr>
<tr>
<td>trash / recycling bins</td>
<td>bulletin boards</td>
</tr>
<tr>
<td>sign stands</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OTHER?</td>
</tr>
</tbody>
</table>

NOTE: Facilities Services charges standard hourly labor rates for all deliveries and event set-ups.

- Contact DEM to request any additional items **no less than two weeks in advance of the event**. If necessary, create a sketch to relay how you wish the room to be set up. Diagrams of some venues are available on the DEM website @ http://www.middlebury.edu/offices/business/scheduling/plan/diagrams

  *PLEASE NOTE: It is the responsibility of the event organizer to confirm details in a timely manner. DEM is unable to monitor progress or provide reminders.*

**Media Services**

- Confirm the technology required for the event.
  
  *DEM will copy the Helpdesk on event confirmations requiring tech assistance. It is up to the event coordinator to follow up with the Helpdesk and ensure that a Helpdesk ticket has been issued to Media Services.*

- If you have a performer with a contract, request a copy of their "technical rider" which will list the equipment requirements for their performance. *Depending on the complexity of the event, you may be advised to contact the Production Advisory Group (PAG) for evaluation and assistance. NOTE: You will incur the cost of any special equipment or staff that needs to be outsourced. Media Services does not otherwise charge for their services.*

- If you wish to have an event videotaped, consult the Media Services web site for supported recording locations and their recording policy. NOTE:
  - You must submit a Recording Request via the Helpdesk.
  - You must obtain a signed Consent & Release form from each participant being recorded.
  
  http://www.middlebury.edu/offices/technology/help/mediaserv/Recordingrequest
If you wish to have an event live streamed, consult the Media Services web site: [http://www.middlebury.edu/offices/technology/help/mediaserv/livestreaming](http://www.middlebury.edu/offices/technology/help/mediaserv/livestreaming)

NOTE: There is a service fee for >100 viewer hours.

**Publicity**

- Prepare materials about the lecturer/performer.
  - Obtain press kit, photos, CV, or biography to assist in the development of the event publicity.
  - Arrange audio/video release forms.

- Write press release and submit to the Communications Office.

- If a poster and/or program is desired, submit info & photo to Printing Services at least 5 business days before needed. Arrange for someone to distribute to poster locations.

- Select or design invitations or write a letter of invitation.

- Select guest list & mail invitations or send letter of invitation to the appropriate listserve.

- To publicize the event on the online Calendar of Events, submit a Calendar Posting Request Form: [http://www.middlebury.edu/offices/business/scheduling/forms](http://www.middlebury.edu/offices/business/scheduling/forms).

**Parking & Public Safety**

- If your event requires Special Event Staff, traffic control, special parking arrangements, staff to unlock road gates, or is of a nature that might draw protest or pose other safety/security concerns, contact Public Safety via email no less than 2 weeks in advance to discuss these details.

**Crowd Control**

- Arrange for crowd management per the requirements adopted by Middlebury College in accordance with State of Vermont: [http://www.middlebury.edu/offices/health/ehs/policies/Crowdmanager](http://www.middlebury.edu/offices/health/ehs/policies/Crowdmanager)

Crowd management services may also be acquired Via the Student Employment Office: email [seo@middlebury.edu](mailto:seo@middlebury.edu) or phone 443-5377.