

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 and consult the Department of Event Management (EM) for guidance.

❖ Event Oversight

- Identify an event coordinator.
The one person responsible for planning the event, arranging for funding (including co-sponsorship requests), and coordinating event logistics and service needs through Event Management; often a Department Coordinator or Student Org Leader.
- Identify an Event Host.
The person responsible for attending the event for its duration, to serve as a point of contact, manage the event, and ensure that crowd management responsibilities are met; often a faculty member, administrator, or student organization member.

❖ Event Review

- If you are planning an event that includes an invited speaker, presenter, or performer, you must submit a request to reserve space at least three (3) weeks prior to the proposed event date. Events are reviewed to assess whether the College has adequate resources to ensure safe and successful events.
Student organizations are required to discuss their events with their faculty or staff advisor prior to submitting an event request.

❖ Event Size & Scope

- If you are organizing a live performance or an event expected to draw more than 200 people, **contact Event Management before beginning your planning process!**

❖ Budget

- Develop a budget (download an [Event Planning Budget Worksheet](#)).
Discuss current rates and fees with individual service providers.
- Identify all sources of funding and obtain the EDORDA for each source.
*Student Organizations, please contact the Student Activities Office.
Individual students, please contact the Office of Residential Life.*

❖ Scheduling

- Identify preferred dates for the event.
 - Consider the purpose of the event and the target audience.
What date and 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> to check for potential conflicts in attracting the intended audience. Be sure to click the link for More Campus Events as well.
 - Check the Academic Calendar to avoid conflict with annual College events.
<http://www.middlebury.edu/academics/calendar/>

- Review the College's policy on Annual Date Restrictions. There are times when the College is unable to support events.
http://www.middlebury.edu/offices/business/scheduling/scheduling_policies/date_restrict
- Be aware of the College policy on Religious Holidays.
<http://www.middlebury.edu/student-life/community-living/diversity-inclusivity/scott-center/religiousholidays>

- Identify a suitable venue and check for availability.
 - What size & type of room is required?
 - Does the space meet your needs for parking, technology, catering, etc.?
 - Check space capacity, features, and availability on 25Live Pro at [https://25live.collegenet.com/middlebury/#home_my25live\[0\]](https://25live.collegenet.com/middlebury/#home_my25live[0]).
 - 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.
Example: auditorium, seminar room, classroom, performance space, etc.
- Schedule a venue.
 - Submit an Event Reservation Request Form online @ <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 for a reception, dinner, break-out sessions, etc. if applicable.*
 - 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. EM will advise of this and offer alternatives ASAP.*
- Confirm a date with your visitor and finalize arrangements only after you have received an Event Confirmation from Event Management:
 - Finalize contracts and related paperwork. Consult the Controller's Office web site 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 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.
<http://www.middlebury.edu/offices/business/tax/visa>

❖ **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/s, please visit it 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:

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| <input type="checkbox"/> tables for catering, registration, panel discussion, book signing, etc. | <input type="checkbox"/> microphones: for speaker/s? for Q&A? wireless or in a stand? Qty? (Helpdesk) |
| <input type="checkbox"/> chairs for guest speaker/s (type?) | <input type="checkbox"/> podium |
| <input type="checkbox"/> arrangement of tables/chairs (layout) | <input type="checkbox"/> room w/ white board |
| <input type="checkbox"/> linens for dining tables (Catertrax) | <input type="checkbox"/> easels (specify w/ or without pads) |
| <input type="checkbox"/> blue cloths for registration or panel tables | NOTE: you must BYO markers |
| <input type="checkbox"/> trash / recycling / compost bins | <input type="checkbox"/> bulletin boards |
| <input type="checkbox"/> sign stands | <input type="checkbox"/> OTHER? |

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

- Contact EM 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. EM can provide blank floor plans on request.*
PLEASE NOTE: It is the responsibility of the Event Host to confirm details in a timely manner. EM is unable to monitor progress or provide reminders.

❖ **Technology**

- Confirm the technology required for the event.
It is up to the event coordinator to contact the Helpdesk and ensure that a Helpdesk ticket has been issued to Media Services. Media Services will contact you to discuss the specifics of your needs.
- If you have invited a performer, request a copy of the "technical rider" associated with their contract. It 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 Media Services' web site for approved streaming locations:

<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 event publicity.
 - Arrange audio/video release forms. *See Technology section.*
- Write a press release and submit it to local media events calendar editors. See [Publicizing Your Event](#). If you have questions, contact Sarah Ray in the Communications Office at ray@middlebury.edu.
- If a poster and/or program is desired, submit info & photo to [Printing Services](#) at least 5 business days before it is needed. Arrange for someone to distribute to poster locations.
- Order invitations from [Printing Services](#), or write a letter of invitation.
- Develop guest list and 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>.

❖ **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, please specify on your Event Reservation Request form.

❖ **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>

Crowd management services may also be acquired via the Student Employment Office: email seo@middlebury.edu or phone 443-5377.