CENTER FOR ASTROPHYSICS
HARVARD & SMITHSONIAN

EVENT PLANNING CHECKLIST

(Off Campus Events)

This Event Planning Checklist was developed to assist staff and faculty when they are organizing lectures, readings, panel discussions, symposia, workshops, meetings, conferences, etc. Not all items on the Checklist will be relevant to every function. Questions pertaining to the Checklist or requests for assistance should be directed to **Elissa Siegel, elissa.siegel@cfa.harvard.edu**.

CONTACT PERSON (usually chair of organizing committee)

□ Name _____

□ Address _____

□ Telephone Number / Fax Number _____

□ E-mail _____

TYPE OF EVENT

□ Conference   □ Panel Discussion   □ Workshop

□ Lecture   □ Reading/Book Signing

□ Meeting   □ Symposium

□ Meal/Reception   □ Other _____

COMMITTEE

SPACE RESERVATIONS

☐ Members (include telephone numbers and e-mail addresses)

☐ Meeting schedule

☐ Distribution of responsibilities
☐ Reserved Venue
☐ Hotel reservations
☐ Venue Type
☐ Venue Set-up
☐ Venue Cost _____
☐ Need Assistance booking a venue

☐ Book room through the room reservation – Notify Charlie Hickey

☐ Rain location (or other inclement weather plans – should you book an outdoor location
☐ Door(s) Security/Access

BUDGET

☐ Source of funds – Grant, Gift, Unrestricted Funds (33-digit costing) _____ ___

☐ Budget required items (for example: travel, entertainment, accommodations, honoraria, poster, printing, flowers, labor, office supplies, photographer, disability accommodations etc.*)

**DISABILITY ACCESS AND
ACCOMMODATIONS** (for
speakers, special guests and participants)
*Questions or for TTY info: contact **Elissa Siegel***

☐ Access inquiries notice on announcements and invitations, when appropriate. (Examples: "Please list any disability accommodations needed." or "For disability accommodations, please call xxx.")

☐ Accessible location

☐ Special transportation- Harvard Campus Services

☐ Accessible hotel room

☐ Lowered podium

☐ Wheelchair access to stage

☐ Special seating section

☐ Sign language interpreter / communication assistance

☐ Alternatives to print materials

☐ Lowered tables vs. counters for registration, etc.

SPEAKERS/PANELISTS

☐ Invitation

☐ Honorarium

☐ Campus escort(s)

☐ Travel plans

☐ Background information

(CV; publicity photograph; title of lecture, if applicable; audio and video release forms, if applicable; background reading material, if applicable)

☐ Speakers' or panelists' contact people, if any, including telephone numbers

☐ Accommodations – Harvard Travel Partners

☐ Surface transportation between airport/train station and campus. Harvard Campus Services

☐ Campus shuttle transport

    ☐ ☐ Parking/passes. Contact Harvard Parking Services
    ☐ Additional Transportation

☐ Identify individual to introduce speaker/ panelists at event and/or moderate panel.

☐ Thank you/honorarium & expense reimbursement.

SPECIAL GUESTS

☐ Invitations

☐ Travel plans

☐ Campus escorts

☐ Accommodations

☐ Design/printing

☐ Guest list

☐ Surface transportation between airport/train

   station and campus. Harvard Campus

   Services

☐ Campus shuttle transport

☐ Parking/passes. Contact Harvard Parking

   Services

☐ Follow-up, if necessary, after event

☐ Extra invitations for files

☐ Name and telephone # of contact person,
particularly if invitation is a conference registration
form

INVITATIONS

☐ Design/printing

☐ Guest list

☐ Include campus map on invitation or enclose

☐ Response deadline date

☐ Person/telephone number to whom to   respond

☐ Internal distribution (if appropriate)

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CATERING/DINNERS/RECEPTIONS
(Charlie Hickey & the Business Office will need to be involved)

□ Budget - Approved

□ On-campus catering (Harvard Crimson Catering).

□ Menu planning (mindful of dietary restrictions)

□ Number of tables and chairs for dining

□ Number of chairs at head table – if needed

□ Flowers for tables (if needed)

□ Linens – if not using Crimson Catering

□ Tally final guest count

□ Place cards/Seating plan – If needed

□ Host/Emcee

□ Schedule of event/timeline

□ Podium/microphone

□ Photographer

□ Coat rack

□ Table/Chairs/Linens

□ Name tags

□ Conference/Meeting Information Packet/Pencils/Pens

□ Gift (if desired)

□ Information Table

□ Trash receptacles

□ Coat racks

SOUND AND LIGHTING NEEDS (REQUEST THROUGH ??)

□ Podium with microphone

□ Microphones for panel

□ Special requests

REGISTRATION AREA

BOOK SIGNING

Bookstores usually offer to contribute a percentage of sales to a college, organization, or program, and they may offer to handle the sales, providing cashier and cashbox, at the event.

□ Bookstore providing books/service

□ Location for book signing

□ Table for books/chair/linens/flowers

□ Table/chair for author

□ Cashier Cashbox/cash for change

□ Distribution of funds after event

PUBLICITY (Nadia??)

□ Must be completed two weeks in advance for events requiring on- or off-campus publicity, routine audio/visual services and/or Facilities Management staff and or services.

□ News and Events

□ Added to Website

□ Facebook and Twitter (Social Media)

□ Overhead projector

□ Slides

□ CD/DVD

□ Data projection

□ Laserdisc

□ Audiocassette

□ WiFi – (Added WiFi for guests)

□ Audio/video taping request Permission of speaker/presenter consent forms

AV NEEDS (REQUEST THROUGH ???)

PLATFORM/ROOM SETUP

☐ Water Bottles/Glasses

☐ Table (panel discussion)

☐ Linens (including skirting) for table

☐ Chairs (on stage)

☐ Microphones

☐ Physical layout – Review with Charlie

☐ Podium spray (flowers) or signage

☐ Bulletin boards/chalk boards/easels
(determine whether required and take into consideration when reserving space)

ADDITIONAL PUBLICITY

☐ Posters

☐ News release (contact **Nadia** at least one month in advance)

☐ *The Gazette (news.harvard.edu)*

   ☐ Facebook (www.facebook.com)

☐ Twitter (www.twitter.com)

RESERVED SEATING

☐ Press section and reserved special guest seating

☐ Signage.

☐ Special needs section—interpreter or other.

ADDITIONAL STAFF ASSISTANCE

☐ Press section and reserved special guest seating

☐ Facilities Management Staff on hand

☐ Dining Services – Beer/Wine Staff

☐ Campus Police Detail

☐ City of Cambridge Permits

☐ Student Ushers

☐ Greeters

☐ Volunteers (forms must be completed)

MISCELLANEOUS

☐ "Thank You" notes

☐ After the event, forward the list of any alumni

  who attended to the Development Office?

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BUDGET PLANNING WORKSHEET

Here is a sample worksheet to set your project budget.

ANTICIPATED EXPENSES		**ANTICIPATED INCOME**		
		Admission Fees	$_____	
Facilities Rental	$_____			
Food	_____	Co-Sponsors (please list below)	_____	
Lodging	_____			
Publicity	_____			
Speaker Fees / Honorariums	_____	Anticipated Grants Income	_____	
		_____ _____ _____		
Supplies	_____	Name of Grant	Amount Requested	Amount Awarded
		_____ _____ _____		
Technical Support	_____	Name of Grant	Amount Requested	Amount Awarded
		_____ _____ _____		
Travel	_____	Name of Grant	Amount Requested	Amount Awarded
		_____ _____ _____		
Security	_____	Name of Grant	Amount Requested	Amount Awarded
		Other Income	_____	
Films License or Permits	_____			
Registration fees	_____			
Other	_____			

*TOTAL $_____   ***TOTAL** $_____

If your totals do not match, you may need to adjust your program accordingly.

POST-EVENT EVALUATION

1. Did we meet our goals/objectives with this event?

2. Did we meet our budgetary goals?

3. Did we have enough volunteers for the event?

4. What could we have done differently to make the event better/more productive?

5. Did we have enough advertising/PR for the event? How could we have made this better?

6. Did we execute the program in a professional manner?

7. Did we face any group conflict with this program? What was it? How was it resolved? What could we have done differently?

8. Would we bring this vendor/performer in again? Was it worth it?

9. Would we execute a similar program in the future? What changes would we make?

10. How does this program allow us to grow as a group, officers, and leaders? Was it a good program?