

EVENT HANDBOOK 2014

SECTION 4: Event Planning Tools, Tips & Checklists

**Produced by the Events Management Office
Smith College**

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EVENTS MANAGEMENT OFFICE

EVENT HANDBOOK



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EVENT PLANNING TOOLS, TIPS & CHECKLISTS

Before You Begin

A few important things you will want to identify before creating a budget for your event are:

1. The purpose of the event.
2. When the event will occur.
3. Who your guests will be.
4. Anticipated # of people attending the event.
5. Locations needed for the event.
6. Services/staffing provided to meet your needs.
7. Equipment needs.

Once you have answered these questions, the following checklist will ask you questions needed to compose a budget for success.

Budget Planning Checklist

Event Date: _____

Event Name/Description: _____

When planning a special-event budget, take applicable costs for the following into account:

Facilities

- ☐ Rental of meeting/reception room(s) _____
- ☐ Rain (or inclement weather) location _____
- ☐ Overnight accommodations: Number of rooms: _____ Rate \$ _____
- ☐ Rental of:
 - ☐ Chairs _____
 - ☐ Tables _____
 - ☐ Props (Specify) _____
 - ☐ Lectern _____
 - ☐ Tent _____
 - ☐ Canopy _____
 - ☐ Lighting _____
 - ☐ Extra help _____
 - ☐ Coat checkroom _____
 - ☐ Special electrical hook-up _____
 - ☐ Special telephone hook-up _____
 - ☐ Set-up charges _____
 - ☐ Clean-up charges _____

Food Service

- ☐ Number of people to be served _____
- ☐ Cost per person for:
 - ☐ Coffee hour _____
 - ☐ Luncheon _____
 - ☐ Dinner _____
 - ☐ Afternoon break _____
 - ☐ Cocktail hour _____
 - ☐ Liquor _____
 - ☐ Wine _____
 - ☐ Other beverages _____
 - ☐ Table linen _____
 - ☐ Rented table service _____
 - ☐ Gratuities _____
 - ☐ Test meal _____

Equipment Rental

- ☐ Tables _____
- ☐ Canopy or tent _____
- ☐ Chairs _____
- ☐ Flooring or Carpeting _____
- ☐ Risers _____
- ☐ Ropes or stanchions _____
- ☐ Props _____
- ☐ Registration desk and stools _____
- ☐ Outdoor toilets _____
- ☐ Booths _____
- ☐ Lighting _____
- ☐ Backdrop _____
- ☐ Trash containers _____
- ☐ Fencing _____

Decorations

- ☐ Flowers _____
- ☐ Table decorations _____
- ☐ Extra plants _____
- ☐ Props _____
- ☐ Corsages, boutonnieres _____
- ☐ Candles _____
- ☐ Direction signs _____
- ☐ Other decor. (ribbons, balloons, etc.) _____

Design and Printing

- ☐ Design concept and package _____
- ☐ Advance notice/"save the date" cards _____
- ☐ Invitations/RSVP Cards _____
- ☐ Programs _____
- ☐ Promotional flyers _____
- ☐ Posters _____
- ☐ Tickets _____
- ☐ Maps _____
- ☐ Place cards _____
- ☐ Signs _____
- ☐ Registration packets _____
- ☐ Name tag holders _____
- ☐ Any other printed material _____
- ☐ Panel nameplates _____
- ☐ Web page _____
- ☐ Online RSVP page _____

Postage and Shipping

- ☐ Postage for invitations and reply cards _____

- o Bulk mailing of promotional materials _____
- o Mailing house charges _____
- o Shipping _____

Recognition Items

- o Awards, plaques, trophies _____
- o Engraving _____
- o Calligraphy _____
- o Framing _____
- o Shipping and handling _____

Miscellaneous

- o VIP travel and expenses _____
- o Honoraria (non-alumnae) _____
- o Gifts _____
- o Mementos _____
- o Temporary help _____
- o Security/fire attendant/ambul./NPD _____
- o Insurance _____
- o First-aid station _____
- o Taping and transcribing proceedings _____
- o Visitor's Center materials and staff _____
- o Accessibility equipment- ramps, _____
- o Sign interpreters, etc. _____

Transportation

- o Busses _____
- o Vans _____
- o Parking _____
- o Valets _____
- o Mileage _____
- o Drivers _____
- o Tolls _____

Entertainment

- o Fees _____
- o Additional equipment _____
- o Promoter fees _____

Publicity

- o Advertising _____
- o Photographer _____
- o Printed photos _____

Publicity (continued)

- o Slides _____
- o Duplicating _____

- o Mailing _____
- o Entertaining/hospitality for press _____
- o Pressroom equipment _____
- o Banners _____
- o Graphic Designer _____

Audio-Visual Equipment

- o Slide and film projectors _____
- o Screens _____
- o Extension cords _____
- o Projector carts _____
- o Microphones _____
- o Mixers _____
- o Speaker system _____
- o Tape recorders _____
- o Television monitors _____
- o DVDs/MP3 players _____
- o Overhead projectors _____
- o Pointers _____
- o Flip charts _____
- o WiFi _____
- o Technician and operator services _____

Other Expenses

- o Staff time _____
- o Overtime and compensatory time _____
- o Additional staff (temp and students) _____
- o Data processing _____
- o Phones _____
- o Duplicating _____
- o Postage for general correspondence _____
- o Supplies (pens, pads, decals, folders) _____
- o Committee materials _____
- o Hospitality for committee members _____
- o Complimentary tickets _____
- o Staff accommodations _____
- o Staff travel and expenses _____
- o Electrical connections _____
- o Water hook-ups _____

MAILING & COPYING SERVICES

MAILING SERVICES

Smith College Mail Services, located on the garden level of the Camus Center, handles all student, faculty and staff mail services.

Mail Services has two counters: one counter for picking up mail & packages and the other counter for dropping off mail/packages. The Mail Services pick-up counter hours are 9 a.m. - 4 p.m., Monday - Friday. The drop-off counter hours are 11 a.m. - 1 p.m. and 2- 4 p.m., Monday - Friday.

For information regarding mail services, visit www.smith.edu/mailservices or email mailservices@smith.edu.

COPYING SERVICES

Smith College Copy and Print Services is located at 126 West Street and is open to all faculty, staff, students, departments and student organizations.

The hours of operation are Monday through Friday, 8:30 a.m. to 4 p.m. and is closed daily from 1 to 2 p.m.

For information regarding copy and print services, visit www.smith.edu/copyprint or email copyprint@smith.edu.

CAMPUS MAPS ONLINE

ONLINE CAMPUS MAP (Flash file) www.smith.edu/map

The Smith College map is an interactive way-finding guide that allows you to scroll to various areas of the campus, zoom in and out, get detailed information on buildings and view overlays that show parking, construction and accessibility. To find a building, click on the menu of building categories and select a category, or view an alphabetical list of all buildings. When selected, the building will be highlighted. You will need the Macromedia Flash player in order to view the map. The player is a free download and is available at www.macromedia.com/downloads.

DOWNLOADABLE CAMPUS MAP (PDF file)

A full-color illustration of the campus, with building key, is available in PDF format for downloading, viewing and printing. Low-bandwidth (approximately 200KB) and high-bandwidth (approximately 2MB) files are available. To view and/or print these maps, visit www.smith.edu/map.

EVENT PLANNING WEB SITES

PLANNING GUIDES

Events Management Handbook	www.smith.edu/emo/resources.php
Campus Center Event Planning Guide	www.smith.edu/campuscenter/EventPlanningGuidelines.pdf

INFO & LOOKUP

Online Calendar	www.smith.edu/calendar
Campus Directory	www.smith.edu/directory
e-Digest	www.smith.edu/edigest

OFFICES

College Relations	www.smith.edu/collegerelations
Events Management	www.smith.edu/emo
News	www.smith.edu/newsoffice
Summer Programs & Non-degree Program	www.smith.edu/summer

ONLINE FORMS

25Live (space and service requests)	https://25live.collegenet.com/smith/#home_my25live[0]
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IMPORTANT OFFICE CONTACTS

CAMPUS CONTACTS HELPFUL IN THE PLANNING STAGE

Accessibility needs & concerns	Office of Disability Services: ext. 2139
Alumnae House Questions.....	Alumnae Relations: Jonelle Dennis, ext. 2021 or 2024
A/V (Audio-Visual) Requests	Educational Technology Services: ext. 3099
Beverages	Dining Services: Meghan Garrity, ext. 2304
Catering Needs	Dining Services: Meghan Garrity ext. 2304
Campus Center Café Catering	Dining Services: Mary Barr, ext. 2326
Campus Directory (voice-activated).....	ext. 4142
Chairs, Tables, Event Supplies, Setup.....	Building Services: ext. 2419 / Events Management, ext. 2407
Custodial staffing & needs.....	Building Services: Diane Benoit, ext. 2421
Dining Services	Main line: ext. 2300
Equipment & Material Transportation.....	Building Services: ext. 2419
Events Management Office.....	Events Management: main office line, ext. 2669
Keys	Facilities Management: Chad Gagnon, ext. 2416
Lock Shop.....	Facilities Management: Chad Gagnon, ext. 2416
Mailings	Mail Services: Richard Paradis, ext. 2622
Material & Equipment Transportation.....	Building Services: ext. 2419
Microphones	Educational Technology Services, ext. 3099
Parking/Traffic Flow	Office of Campus Police, ext. 2490
Printing	Copy and Print Services: Chris Gentes, ext. 2600
Publicity	College Relations, ext. 2190
Security/Safety	Office of Campus Police, ext. 2490
Setup for Event, Supplies, Tables, Chairs	Building Services: ext. 2419 / Events Management, ext. 2407
Space Reservations (Alumnae House).....	Events Management Office, ext. 2162
Space Reservations (rest of campus)	ACADEMIC YEAR: Events Management Office, ext. 2162
.....	SUMMER: Summer Programs, ext. 3736
Signage.....	Facilities Management: Bob Chartier, ext. 2428
Summer Programs & Conferences Administration	College Relations: ext. 2892
Supplies, Setup, Tables, Chairs	Building Services: ext. 2419
Tables, Chairs, Event Supplies, Setup.....	Building Services: ext. 2419
Traffic Flow/Parking	Office of Campus Police, ext. 2490
Transportation/Vans	Facilities Management: ext. 2400
Transportation of Material & Equipment	Building Services: ext. 2419
Video Projectors.....	Educational Technology Services: ext. 3099

DIRECTIONS TO SMITH

TRAVELING BY CAR

- **From Points South**

Northampton is on Route I-91 in Massachusetts. Take Exit 18. At the end of the ramp, turn left. Follow Route 5 north into the center of town. Turn left onto Route 9. Go straight through four traffic lights, turning left into Smith's main entrance (College Lane) shortly after the fourth set. The Office of Admission is on your right, overlooking Paradise Pond. There is metered on-street parking all along Route 9, as well as a parking garage on West St, just beyond the town library on the left.

- **From Points North**

From I-91 South, take Exit 20, and follow onto Route 5 south into the center of town. At the intersection of Route 5 and Route 9 (Main Street), turn right onto Route 9. Go straight through four traffic lights, turning left into Smith's main entrance (College Lane) shortly after the fourth set. The Office of Admission is on your right, overlooking Paradise Pond. There is metered on-street parking all along Route 9, as well as a parking garage on West St, just beyond the town library on the left.

- **From the East or West**

Use the Massachusetts Turnpike: Northampton is on Route I-91 North (Mass Pike exit 4).

TRAVELING BY BUS

Peter Pan, Greyhound and Vermont Transit serve the area. Most routes go to the main bus terminal in Springfield, where you can catch another bus to Northampton. Buses run almost hourly between Springfield and Northampton. Smith is a 10-minute walk or a short taxi ride from the bus station. Call 413-586-1030 for bus schedules.

TRAVELING BY TRAIN

Amtrak—800-872-7245—runs trains to Springfield. From Springfield you can take a bus or get van service to Northampton from Valley Transporter. Valley Transporter requires advance reservations; call 413-253-1350 or toll-free at 800-872-8752.

TRAVELING BY AIR

The closest airport is Bradley International, located about 35 miles south of Northampton near Hartford, Connecticut. It is served by most major airlines. Flying into Bradley rather than to Boston's Logan Airport gives you a shorter drive to Northampton and spares you city traffic congestion. Limousines, buses and rental cars are available at the airport. Transportation to Smith from the Boston or Hartford airports is also available from Valley Transporter or Michael's Limousine Services. Valley Transporter can be reached at 413-253-1350, or 800-872-8752. Michael's Limousine Services can be reached at 413-583-6392 or 800-533-8470. Deluxe Limo Services can be reached at 413-821-0069.

EVENT PLANNING CHECKLIST FOR ON-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 the Events Management Office at ext. 2669 or to smithevents@smith.edu.

TYPE OF EVENT

- ☐ Conference _____
- ☐ Lecture _____
- ☐ Meeting _____
- ☐ Meal/reception _____
- ☐ Panel discussion _____
- ☐ Reading _____
- ☐ Reading/book signing _____
- ☐ Symposium _____
- ☐ Workshop _____
- ☐ Other _____

CONTACT PERSON (USUALLY CHAIR OF ORGANIZING COMMITTEE)

- ☐ Name _____
- ☐ Address _____
- ☐ Telephone number / Fax number _____
- ☐ Email _____

COMMITTEE

- ☐ Members (include telephone numbers and email addresses)
- ☐ Meeting schedule
- ☐ Distribution of responsibilities

BUDGET

- ☐ Source of funds
- ☐ Accounts required (for example: travel, entertainment, accommodations, honoraria, poster, printing, flowers, labor, office supplies, photographer, disability accommodations etc.)

SPACE RESERVATIONS

- ☐ Go to 25Live to make a request for a location on campus for your event. Use your 99# (identification number) to log in. For complete information, please go to www.smith.edu/emo/plan.php to learn how to use 25Live and for a list of available spaces on campus. Be sure to consider capacity requirements.
- ☐ Rain location (or other inclement weather plans)

DISABILITY ACCESS AND ACCOMMODATIONS (FOR SPEAKERS, SPECIAL GUESTS AND PARTICIPANTS)

- ☐ Access inquiry notice on announcements and invitations, when appropriate. (Examples: "Please list any disability accommodations needed." or "For disability accommodations, please call the Office of Disability Services: 413-585-2139.")

- ☐ Accessible location
- ☐ Special transportation
- ☐ Accessible hotel room
- ☐ Lowered podium
- ☐ Wheelchair access to stage
- ☐ Special seating section
- ☐ Sign language interpreter/communication assistance
- ☐ Alternatives to print materials

Questions? Contact Laura Rauscher, Director, at ext. 2071 or at lrausche@smith.edu

SPEAKERS/PANELISTS

- ☐ Invitation
- ☐ Background information (CV; Social Security number; 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
- ☐ Honorarium
- ☐ Campus escort(s)
- ☐ Travel plans
- ☐ Accommodations. See: www.smith.edu/admission/visiting.html for a list of area hotels and directions on how to get to Smith College.
- ☐ Surface transportation between airport/train station and campus. *Recommended service: Deluxe Limousine Service: 413-821-0069 for 24-hour service; 413-821-0063 for fax. Contact: Roberto Baez.*
- ☐ Campus shuttle transport. *Contact Facilities Management Customer Service: ext. 2400, vehicle@smith.edu.*
- ☐ Parking/passes. *Contact Campus Police, ext. 2490.*
- ☐ 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
- ☐ Surface transportation between airport/train station and campus. *Hire local transporter, Deluxe Limousine Service: 413-821-0069 for 24-hour service; 413-821-0063 for fax. Our contact is Roberto Baez.*
- ☐ Campus shuttle transport. *Contact Facilities Management Customer Service: ext. 2400, vehicle@smith.edu.*
- ☐ Parking/passes. *Contact Campus Police, ext. 2490.*
- ☐ Follow-up, if necessary, after event

INVITATIONS

- ☐ Design/printing
- ☐ Guest list
- ☐ Include campus map on invitation or enclose (campus maps can be obtained from College Relations Office or online at www.smith.edu/map)
- ☐ Response deadline date
- ☐ Person/telephone number to whom to respond
- ☐ Internal distribution (if appropriate)
- ☐ Extra invitations for files
- ☐ Name and telephone number of contact person (Voice and TTY*), particularly if invitation is a conference registration form

** For TTY info, contact Laura Rauscher, Director of Disability Services, at ext. 2071.*

CATERING/DINNERS/RECEPTIONS

- ☐ Budget
- ☐ On-campus catering (if using Smith College Catering, email catering@smith.edu). Catering requests should be accomplished before completion of the the event location request in 25Live. Links to both the Smith College Catering and the Campus Center Cafe catering forms can be found at the Smith College Catering Web site: www.smith.edu/diningservices/catering.php.
- ☐ Menu planning (mindful of dietary restrictions)
- ☐ Number of tables and chairs for dining
- ☐ Number of chairs at head table
- ☐ Flowers (Smith College Catering can include and provide cost estimate)
- ☐ Linens
- ☐ Tally final guest count
- ☐ Place cards
- ☐ Host/Emcee
- ☐ Schedule of evening/timeline
- ☐ Podium/microphone
- ☐ Photographer
- ☐ Coat rack
- ☐ Name tags

REGISTRATION

- ☐ Table/Chairs/Linens
- ☐ Name tags
- ☐ Conference/Meeting Information Packet/Pencils/Pens
- ☐ Gift (if desired)
- ☐ Information Table
- ☐ Trash receptacles
- ☐ Coat racks

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

25LIVE RESOURCES (PUBLICITY/SERVICES)

Resource requests must be completed two weeks in advance for events requiring routine audio/visual services and/or Facilities Management staff and or services. For on- or off-campus publicity, submit requests three weeks in advance.

To confirm: Technical Services requests (ext. 3099), Facilities Management requests (ext. 2407).

Publicity

- ☐ 5-College calendar
- ☐ Local media calendars

AV needs

- ☐ Overhead projector
- ☐ Slides
- ☐ CD/DVD
- ☐ Data projection
- ☐ WiFi

Video/audio taping request

- ☐ Permission of speaker/presenter (consent forms available at www.smith.edu/emo)

Sound Needs

- ☐ Podium with microphone
- ☐ Lavalier
- ☐ Microphones for panel

Lighting needs

- ☐ Special requests

Platform/Room setup

- ☐ Table (panel discussion)
- ☐ Linens (including skirting) for table
- ☐ Chairs (on stage)
- ☐ Microphones
- ☐ Physical layout
- ☐ Podium spray (flowers)
- ☐ Smith Banner

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

ADDITIONAL PUBLICITY

- ☐ eDigest (www.smith.edu/edigest)
- ☐ Posters (www.smith.edu/about_publications.php)
- ☐ *The Gate* (www.smith.edu/news)
- ☐ *The Sophian* (www.smithsophian.com))

RESERVED SEATING

- ☐ Press section and reserved special guest seating. (Please post information on 25Live.)
- ☐ Signage. (Contact the Events Management Office at ext. 2407 or scampbel@smith.edu.)
- ☐ Special needs section—interpreter or other. (Contact the Office of Disability Services, ext. 2139.)

ADDITIONAL STAFF ASSISTANCE

- ☐ Facilities Management Staff—request to be made on 25Live (Contact the Events Management Office, ext. 2407 or scampbel@smith.edu.)
- ☐ Dining Services (call ext. 2300)
- ☐ Campus Police (ext. 2490 or sgraham@smith.edu)
- ☐ Northampton Police, for street. (Contact Campus Police, ext. 2490, or sgraham@smith.edu.)

PLEASE NOTE: The Campus Police will determine the need for Campus Police officers at an event and whether or not a Northampton Police officer is needed to direct traffic. For larger events, particularly those held in John M. Greene Hall, please advise Events Management (ext. 2407 or scampbel@smith.edu) of estimated crowd size.

- ☐ Northampton Fire Department Permits (Contact Rich Korzeniowski, ext. 2458 or rkorzeni@smith.edu)
- ☐ Student Ushers (use JobX for posting)
- ☐ Greeters
- ☐ Volunteers

MISCELLANEOUS

- ☐ “Thank You” notes
- ☐ After the event, forward the list of any alumnae who attended to the alumnae Research Dept, which is part of Development within the Alumnae House
- ☐ WiFi access

EVENT PLANNING TIMELINE FOR OFF-CAMPUS EVENTS (Sample Guide)

EVENT

- ☐ Event Name _____
- ☐ Timeline and Checklist for [Event Name] _____
- ☐ Location: [Date], [Start time]—[End time] _____

CONTACTS: [INCLUDE NAME, TITLE, PHONE AND EMAIL INFO]

- ☐ Facility _____
- ☐ Caterer _____
- ☐ Special Guests _____
- ☐ Participants _____

TO BEGIN THE PLANNING PHASE

Work with Event Coordinators to complete the following steps:

- ☐ Determine best date and time to hold event. Consider:
 - *School vacations.*
 - *Surrounding holidays.*
 - *Likelihood of inclement weather in area.*
 - *Target audience.*
 - *What is happening at Smith that day/week, etc.*
- ☐ Determine event location.
- ☐ Determine database manager (if needed).
- ☐ Set up event in Banner Events Module (see notes).
- ☐ Determine whether to invite parents, local alumnae, general public, guests.
- ☐ Determine zip code range and get counts (see notes) if an invitation is to be mailed.
 - *Review map and zip code books. Determine areas Cross-check against club zip code ranges. (Not all zip codes have clubs, but you want to make sure not to invite only part of a club.)*
- ☐ Notify all area club presidents and trustees (where necessary).

FIRST STEPS

- ☐ Determine any speaker(s) and design program:
 - *What should be emphasized?*
 - *Student involvement?*
 - *Alumnae involvement?*
 - *Faculty and or staff involvement?*
- ☐ Develop text for invitation, poster and publicity.

- ☐ Meet with design staff about specifics of printed material.
 - *Verify event location, address and time.*
 - *Write invite copy (the text of the invite).*
 - *Driving directions proofed by local alumna (Club President, etc.)*
 - *What is the final RSVP date?*
- ☐ In instances of all-college events, review your draft with College Relations and/or the President's Office for invitation and poster design/layout. **PLEASE NOTE: for any event in which the President will be participating, you must get approval from the President's Office for your printed material(s).**
 - *Send text, layout, thoughts for proofing/approval.*
 - *Consider how many of each invite piece you'll need.*
 - *Order extra (internal distribution, trustees, etc.)*
- ☐ Post an event on 25Live and request publicity so the event will appear on The Gate and all appropriate news publications—work with Club Presidents; encourage them to list event in newsletter where appropriate.

AS EARLY AS YOU CAN ...

- ☐ Prepare a budget and secure funding.
- ☐ Request and review details regarding:
 - *Coat check, staffing for coat check.*
 - *Security.*
 - *Maintenance.*
 - *Gratuities.*
 - *Room.*
 - *AV/Media Services.*
 - *Facilities Management/Custodial coverage.*
 - *Parking/signage.*
 - *Guest numbers.*
 - *Food cost.*
 - *Other costs associated with the event (NPD, NFD attendance, etc.)*
- ☐ Request menus.
- ☐ Block hotel rooms if participants/guests are traveling.

9 WEEKS PRIOR

- ☐ Invites back from printer?
- ☐ Determine invitation list.

8 WEEKS PRIOR

- ☐ Mail invites (where appropriate).
- ☐ Email copy of the invite (PDF File) to faculty, staff and students (where appropriate).

7 WEEKS PRIOR

- ☐ Responses begin to arrive.
- ☐ Record RSVPs, and process checks daily (if possible).
- ☐ Generate attendance list to staff, then update once per week.

4 WEEKS PRIOR

- ☐ Write first draft of briefing memo from coordinator for participants (if applicable).
- ☐ Check attendance—and all final details.

3 WEEKS PRIOR

- ☐ Go over menu.
- ☐ Send briefing memo to all staff involved (if applicable).
- ☐ Contact participants to confirm travel/accommodations.
- ☐ Identify extra helpers needed (volunteers, ushers, student workers).
- ☐ Confirm event room and all details.

2 WEEKS PRIOR

- ☐ Final RSVP date.
- ☐ Give final food count to caterer.
- ☐ Schedule time for a post-event meeting with all staff attendees to review the event (if applicable).

1 WEEK PRIOR

- ☐ Re-check attendance list for “notable attendees” who may require presidential briefings (if applicable).
- ☐ Meet with all staff involved to go over staffing/volunteer assignments, logistics (if applicable).
- ☐ Confirm attendance number and all final details.
- ☐ Name tags
 - *Printed.*
 - *Nametags proofed against RSVP cards twice.*
 - *Nametags bundled alphabetically.*
 - *Extra nametags, extra badges.*
 - *Nametags put in the boxes for easy transportation/organization.*
- ☐ Attendance Lists
 - *Prepared.*
 - *Print several lists: sorted by alpha, sorted by class, sorted by zip code.*
- ☐ Event Coordinator “Spy Kit”
 - *Pull together all office supplies that you may need at the event.*
 - *Bring scissors, tape, blank name tags, directional signage, banners, table banner, posters, fluorescent paper for creating signage on-the-spot, reserved-seating signs, etc.*

AT THE EVENT SITE: CHECKLIST

- ☐ Be on site at least 1.5 hours before event.
- ☐ Meet with catering manager to confirm menu, time, setup etc.
- ☐ Rooms are clean and are a comfortable temperature.
- ☐ Registration table setup—1 to 2 hours before event starts.
- ☐ Be at registration table ready to help guests ½ hour before event.
- ☐ Draping for table, chairs, wastebasket, pens, attendance list(s).
- ☐ Nametags set out on table alphabetically by last name, with tags facing arriving guests.

Program area

- ☐ Meet with AV technician.
- ☐ Confirm microphone and podium, lights are working.
- ☐ Water and drinking glasses available for panelists or speakers.
- ☐ “Reserved Seat” signs in place.
- ☐ Have more chairs than guests expected.
- ☐ Pen, pencil and notepad, water and glasses (cough drops?) on panel table.

General Area

- ☐ Bathrooms clean and accessible.
- ☐ Coat check clearly marked and properly staffed.

AFTER THE EVENT

For Alumnae Events

- ☐ Code all alumnae attendees in BANNER.
- ☐ Send thank you notes to participants and volunteers.
- ☐ Gifts to participants (where applicable).

EVENT PUBLICITY

AVENUES FOR PUBLICITY

Increasingly, email and the Internet have become the most effective tools for imparting information and publicizing events to the Smith community. The Office of College Relations has shifted its approach accordingly. The following online resources have been established to address the college community's publicity needs:

- **eDigest**—A listing of notices, events, announcements and exhibitions, distributed every Tuesday and Thursday during the academic year (every Tuesday in the summer) to all Smith email accounts and posted at www.smith.edu/edigest.
- **The Grécourt Gate**—A Web page produced by College Relations, featuring articles about Smith College and its people, their achievements, interesting projects, research and events (www.smith.edu/news). Selected content will be included in eDigest distributions.
- **Smith Calendar**—A compendium of events taking place at Smith, with descriptions of the events, listed by day, time and location (www.smith.edu/calendar). Look here for what's happening today or in the near future, or to plan an event.
- **Five College Calendar**—In addition to the above news outlets, this is a listing of educational, cultural and athletic events covering all Five Colleges. www.calendar.fivecolleges.edu.

The Smith College News Office also distributes information to more than 30 **local and regional media calendars**, such as those printed in *The Valley Advocate*, *Hampshire Life* and Five College student newspapers, and those aired on radio stations WFCR and WAMC, and television channels 22 and 40.

PUBLICIZING YOUR EVENT

NOTE: information you would like to have listed on the Smith, Five College and local media calendars should be submitted through 25Live ([https://25live.collegenet.com/smith/#home_my25live\[0\]](https://25live.collegenet.com/smith/#home_my25live[0])) according to the deadline schedule listed at www.smith.edu/news/calendarschedule.html. Information about submission procedures can be found at www.smith.edu/news/submit.php.

To discuss a story of interest to the Smith community, contact Barbara Solow (at least two weeks in advance of an event) at 413-585-2171 or send an email to bsolow@smith.edu. We welcome your submissions. If you—or someone you know in the Smith community—have recently received an award, participated in an interesting event, or are involved in an important endeavor, please let us know. If you think that your event or information is particularly newsworthy and may warrant some feature treatment off campus, contact Stacey Schmeidel, media relations director, at 413-595-2191 or send an email to sschmeid@smith.edu at least one month in advance to discuss other types of promotion that may be appropriate.

These publicity tools will serve the Smith community's publicity needs efficiently. We encourage the college community to use these resources and are prepared to assist as necessary.

INITIAL REQUEST FOR PRESIDENT TO PARTICIPATE IN EVENT (Sample Form)

If you are interested in having the President of the college attend an event, you should make initial contact with Beth Berg, Executive Assistant to the President, at 413-585-2106 or bberg@smith.edu.

Below are suggestions of sample information that you will want to have ready for your initial contact. Please prepare the below information before calling.

Today's date: _____

Your name: _____

Your phone: _____ Your email: _____

Your department & address: _____

Your contact info (if other than above): _____

Event outline: _____

Proposed date: _____

Alternate dates: _____

Time frame: _____

Estimated target audience (both # of people and demographic): _____

Format (panel, dinner, conference, etc.): _____

Special guest: _____

Location needs: _____

Budget source: _____

Presidential participation: _____

Additional info: _____

WHERE TO FIND IT

From the Smith homepage (www.smith.edu), click the Calendar link on the bottom of the page, or go to www.smith.edu/calendar. (You may want to bookmark this Web address.)

HOW TO USE IT

View by Event Category: The calendar will open to the featured events for the next four months. To see events in specific categories (e.g., lectures, athletic events, student interest, etc.), click on the **View by Category** box at the top of the page and select a filter.

View All Events: When you click on *All Events* in the **View by Category** box, you will see a daily listing of all events posted for that week.

View a Description of the Event: Click on the name of the event to view details of the event, including type of event, location, and primary contact.

View by Date: Enter a specific date in the **Go To Date** box at the top of the screen. If you have selected a category, you will see only those events for that specific date. Select All Events to see every event scheduled for that date.

View by Month: Click on the month found directly under to **Go To Date** box to view events scheduled. To see all events scheduled for that month, first click on *All Events* in the **View by Category** box.

Search by Keyword: Click on the *All Events* category in the **View by Category** box and then type in any word associated with the event you are searching for in the **Search This Calendar** box.

POSTER DISTRIBUTION

Posters are distributed through campus mail by Copy and Print Services to liaisons at various departments (28), who are then responsible for hanging new posters and keeping the kiosks up-to-date. They also send posters to student affairs for posting in student houses (50). There is no charge for these poster services. Visit Copy & Print Services at www.smith.edu/copyprint/postering.php for more information.

POSTING LOCATIONS & POSTER INFORMATION LIAISONS

Departments and Offices

76 Elm Street	1
Ainsworth Gym	1
Alumnae House	1
Bass Hall	1
Burton/McConnell Hall	1
College Archives	1
College Hall, Registrar's Office	1
College Hall, Class Dean's Office	1
College Hall, second floor	2
College Relations, 30 Belmont	1
Dewey Hall	1
Events Management (includes kiosk at JMG)	2
Facilities Management	1
Ford Hall	1
Hatfield Hall	1
Helen Hills Hills Chapel	1
Hillyer (art)	1
Josten Library	1
Lilly Hall	1
Neilson Library (includes kiosk at Neilson)	2
Pierce Hall	1
Sage Hall	1
Seelye Hall	1
Theatre (Gamut)	1
Wright Hall	1
Total department posters	28

Student Affairs

Head Residents (pick up for houses)	50
Total posters including student houses	78

TRANSPORTATION

For more information, see www.smith.edu/facilities/vehicle.php.

DRIVER CREDENTIALING

Vehicle credentialing information must be on file with the Controller's Office prior to the release of a college vehicle to any Smith faculty member, staff member, or student. *The link to the form is below.*

Driver Credentialing Instructions www.fivecolleges.edu/sites/riskmgmt/howtosc/
Driver Credentialing Form <https://riskmgmt.mtholyoke.edu/form.php>

VEHICLE REQUESTS

For all vehicle reservations, complete the online *Vehicle Request Form* and submit to Facilities Management. (www.smith.edu/facilities/vehicle_form.php) This form must be completed each time you are planning a trip.

Other things to consider when requesting a vehicle:

- **College vehicles must be reserved 2 weeks in advance.**
- Vehicles cannot be reserved for more than three days at a time.
- Cancellations must be called in as soon as possible to 413-585-2400.
- Van mileage, fast passes or tolls, fees and parking are the responsibility of the requesting department.
- Keys will not be issued to anyone other than the listed responsible driver. Vehicle keys should be picked up at facilities management.
- Students may drive only the six-passenger vans and these may be used only for class-related trips.
- Use of the 14-passenger van (mini bus) requires a CDL/Passenger-endorsed license.
- Smith College vehicles may not be driven on NY State Parkways.

RESPONSIBILITIES AND CHARGES

To see what rates your department will be charged, please visit www.smith.edu/facilities/vehicle.php.

ACCIDENTS

Should an accident occur while you are using a college vehicle, please follow the instructions in the insurance packet found in the glove compartment and notify Campus Police at 413-585-2490.

Departments will be responsible for the payment of the current insurance deductible in the case of an at-fault accident.

BUS SERVICE

PVTA (Pioneer Valley Transit Authority) Bus Service

Public transportation through the Pioneer Valley links Northampton with Easthampton, Holyoke and Springfield, and with Florence, Leeds, Haydenville, and Williamsburg. Current schedules and prices for these routes are available by calling the PVTA information center at 413-781-7882 or visiting www.pvta.com.

Five College Bus Service (www.umass.edu/transit/buses.html)

UMass Transit provides bus and van service to the University/Five College communities. They provide safe, efficient, and economical mobility for nearly 15,000 riders every day. They operate PVTA buses for the Five Colleges as well as the towns of Amherst, Belchertown, Deerfield, Granby, Hadley, Northampton, South Hadley, and Sunderland.

Bus routes operated by UMass Transit are fare-free for Five College students, faculty and staff. For the general public, fares are on a proof-of-payment "honor system". Bus drivers will not collect fares/passes, but passengers are expected to have either a valid Five College student, faculty or staff ID cards or a fare ticket/pass for each ride.

PLEASE NOTE: The Smith bus stop is located on Elm Street in front of John M. Greene Hall.

PVTA Schedules are available for the following routes:

(Click on a route number below to see an online PDF of that route.)

• Bus route 30 :	North Amherst / UMASS / Old Belchertown Road
• Bus route 31 :	Sunderland / UMASS / South Amherst
• Bus route 32 :	Puffers Pond / UMASS / Atkins Corner
• Bus route 34 :	UMASS Campus Shuttle Northbound
• Bus route 35 :	UMASS Campus Shuttle Southbound
• Bus route 36 :	See the Belchertown Center schedule
• Bus route 37 :	Amity Shuttle / UMASS
• Bus route 38 :	Mt Holyoke College / Hampshire College / Amherst / UMASS
• Bus route 39 :	Smith College / Hampshire College / Mount Holyoke College
• Bus route 45 :	Belchertown Center / Gatehouse Road / UMASS
• Bus route 46 :	South Deerfield / UMASS
• Bus route 40 :	Minuteman Express / Amherst / Northampton
• Bus route 43 :	Northampton / Hadley / Amherst

Schedules Available on Your Mobile Phone

You can view schedules on your mobile phone at <http://m.pvta.com>.

REGISTRATION PACKET & MATERIALS

WHAT TO INCLUDE IN EACH FOLDER

Below is a list of items that should be included when preparing registration packets for participants attending your event:

- ☐ Nametag
- ☐ Pen/pencil
- ☐ Paper
- ☐ Map of campus
- ☐ Parking voucher (or pass), if needed
- ☐ Schedule of event
- ☐ Participant listing (if appropriate)
- ☐ Reimbursement form
- ☐ Evaluation form
- ☐ Emergency information
- ☐ Local guides & brochures

EVENT COORDINATOR “SPY KIT”

WHAT IS A “SPY KIT”?

A “Spy Kit” is a box containing the following items, which you’ll send or bring to the event location for use by the event staff there.

- ☐ **Writing implements:** pens, pencils, fine and heavy black markers.
- ☐ **Tape:** Scotch tape, masking tape, packing tape to reseal boxes.
- ☐ **Signs:** “Reserved Seat” signs, laminated directional signs (two for each direction), stanchions to hold signs on tables (not always used, ask first).
- ☐ **Blank, fluorescent paper (or cardstock):** to use for ad-hoc signage at the event location.
- ☐ **Money:** Petty cash to make change for an event where people pay at the door, quarters for parking meters.
- ☐ **Notebook paper.**
- ☐ **Thank-you gifts:** for volunteer/club presidents.
- ☐ **Attendance lists (ask first):** Attendance lists must not have ratings or PPM’s on them. Include a few sorted by current last name, a few by class year, and a few by city.
- ☐ **Blank nametags** and plastic name tag holders (magnetic, clip, string, or lanyard).
- ☐ **Blank registration—or RSVP—cards.**
- ☐ **Pre-written mailing labels and envelopes:** to send materials back to campus at the conclusion of the event.

Be sure to mail/ship any banners, posters, or handouts needed for an event to the event location at least one week prior to the event date.

TIPS FOR HIRING A CATERER

When hiring a caterer for your event or party, there are a few things you should know in order to make an informed decision:

- First, caterers cannot only provide you and your guests with a beautiful display of delicious foods, but some are also full-service event planners.
- The costs of catering services will, of course, vary in accordance with the amount of time and materials needed to give your event a distinct and distinguished appearance.
- Having a good idea of your budget is crucial when picking a caterer. Also, keep in mind what your guests may be expecting and what kind of image you will be portraying. After doing this, you are ready to begin deciding where to spend most of your money and where to trim the excess.
- If working with an outside caterer, ask the caterer to see his or her portfolio. Be sure to check references and always get a letter of contract. Come to an agreement on all fees, gratuities, sufficient insurance, extra charges, payment schedules, and cancellation policy. A 50 percent down payment is often due up front, with the balance due at a later, specific date.
- Make sure your caterer is professional in appearance, attitude and in preparation of the final product, your food. Communicating with him or her on a mutual respect basis will help in providing your guests with a comfortable, exciting atmosphere.
- Finally, if you are using an external caterer, be sure to check that there are no food or catering restrictions in the space you have reserved (Alumnae House, Atrium, Neilson Browsing Room, classrooms, auditoriums, etc.)

FOR MORE INFORMATION ABOUT CATERING AT SMITH

Please refer to Section 5 of the Events Management Handbook: “Event Services” for a link to a PDF with more information.

SUGGESTED LIST OF CATERERS

Smith College Catering

30 Belmont Avenue,
Meghan Garrity, 413-585-2300
mgarrity@smith.edu

Atkins Farm

Corner Route 116 and Bay Road, Amherst
Dave Mckemma,
413-253-9528/ or
800-594-9537
info@atkinsfarms.com

Black Sheep Catering

79 Main Street, Amherst
413-256-1706
blacksheepdeli.com
blksheep@crocker.com

Blue Heron Restaurant

112 N Main Street, Sunderland
Deborah Snow, 413-665-2102
www.blueherondining.com

Myer's Catering

P O Box 13, Northampton
Richard Lyman, 413-584-4145
partyplanners@myerscatering.com

Pengyew Catering

355 Rocky Hill Road, Florence
413-253-8985
pycatering.com
www.pycatering@crocker.com

Seth Mias Catering

PO Box 538, Leeds
Seth Mias, 413-695-3889
www.sethmias.com

HIRING A DISC JOCKEY

QUESTIONS TO ASK WHEN HIRING A DISC JOCKEY

- Do you have backup equipment?
- Do you provide Master of Ceremony services?
- What is your attire?
- Can we visit an area where you are performing? (Some DJ's allow this at services being provided to clients "other than weddings.")
- Do you have a contract? (***Never book a DJ without a contract!***)
- Can we hear some music selections?
- Do you have a music list?
- Do you have references?
- What is your payment policy & deposit policy?
- Are you able to stay beyond the scheduled time if needed?
- Are you part of a union?
- What is your cancellation policy?

ADDITIONAL THINGS TO REMEMBER

- Do you have an event information sheet to give to the DJ? (This will let the DJ know about the entire event and the people planning it, the schedule, etc.)
- Make sure the DJ you are hiring is the DJ who will be at your event. Some people act as DJ brokers and the person who works your event is not necessarily the person you initially met with.
- Certain lighting like "strobes" should not be used in case you have a person with epilepsy.
- Be aware that some special effects will not be allowed if they are deemed potentially dangerous or a potential fire hazard.
- Some people ask for a video before hiring a DJ, and although it is not a bad idea you should be aware that any video can be edited to improve the look of an event.

LOCAL DISC JOCKEYS

Please refer to Section 5 of the Events Management Handbook: "Event Services" for a list of local disc jockeys.

FLORAL ARRANGEMENT TIPS

FLORAL ARRANGEMENTS

Flowers can be a large part of any occasion and are a lovely way to set the tone for a perfect event. If doing floral arrangements yourself, you must determine your floral plans well in advance and arrange the flowers before the event.

To begin with, the floral foam must be soaked. This allows the flowers to soak in some moisture after being cut fresh or after being pulled from water buckets. The amount of soaking time depends on the type of blocks (check the instructions) and can be done in an old bucket or tin pail. Drain them slightly, as they are quite heavy after being soaked. As long as they remain damp, it is easy to recharge when needed.

Fresh flowers should be picked either early or late in the day. Do not attempt to pick in the warmest temperatures, as flowers will wilt sooner. Cut the stems at an angle and allow them to get a long, cool drink in deep water before arranging (i.e. two hours minimum). Overnight is preferable.

LOCAL FLORISTS

For a list of local florists, please refer to Section 5 of the Events Management Handbook: “Event Services.”

NAME TAG GUIDELINES

NAME TAG TIPS

Use **LARGE FONTS** for names on conference/event nametags. Use bold, sans-serif typeface with the largest possible letter size. Name tags should be easy to read from at least 12 feet (3 meters) away. The whole purpose of a nametag is to make it easy for people to meet, mingle, and say hello. Avoid giving out nametags that require your conference participants to squint and stare.

Nametags with the Smith College logo (\$0.25 per sheet) can be ordered through Pat Wheeler in College Relations. Send an email with the desired number of sheets and the department account number to Pat Wheeler at pwheeler@smith.edu or by calling ext. 2172.

TRANSPORTATION ACCOMMODATION FORM & EXPENSE REIMBURSEMENT FORM

TRANSPORTATION ACCOMMODATION FORM

To access the vehicle request form, visit the Facilities Management site:
www.smith.edu/facilities/vehicle.php

EXPENSE REIMBURSEMENT FORM

An expense reimbursement form can be found and printed at www.smith.edu/controller/Forms.php.

INSTRUCTIONS

Smith College accounting procedures and Internal Revenue Service regulations require a detailed accounting of expense reimbursement payments made by the College. If you submit a detailed accounting to the College for reimbursement payments, we are not required to add such payments to your salary for tax purposes.

Please keep adequate records and original receipts. Use of an account book or diary is strongly recommended. State the time, place, business purpose, and amount of each expenditure. Obtain original receipts for all expenditures. Receipts are always required for all lodging expenses.

PLEASE NOTE: For other expenditures less than \$25.00 receipts are not necessary if noted in the account book or diary.

In order to reduce lost receipts and to facilitate scanning of documents, receipts should be taped (no staples please!) to a separate piece of paper with each receipt individually taped. Please submit as many taped receipts on one piece of paper as space allows. Attach original receipts and your account book/diary to this form.

Prepare this form in duplicate. Submit all original documentation and keep one copy for your tax records to support the exclusion of reimbursements from your tax return.

Submit reimbursement request with original receipts to the Payroll & Disbursements Office in College Hall within 30 days after expenses have been incurred.

If you have received an advance payment and your actual expense exceeds this payment, additional reimbursement will be paid by check mailed to your home address. If the advance payment exceeds your actual expense, refund the balance by cash or check payable to Smith College.

The College provides a corporate credit card to all employees who travel for college and professional purposes. The College requests that the card be used whenever possible. This eliminates the need for advances. Please contact this office for further information concerning this program.

TRANSPORTATION ACCOMMODATION FORM

(Sample)

Event: _____ Date: _____

Please help us to facilitate your visit to campus by entering the information requested below and returning the form via fax or email by _____ to Pat Wheeler, Office of College Relations, Smith College [Fax: 413-585-2178, pwheeler@smith.edu.]
(date)

EVENING ACCOMMODATIONS AT THE HOTEL NORTHAMPTON

____ Day, Date _____

____ Day, Date _____

____ Single Room

____ Double Room Guest name: _____

TRANSPORTATION / TRAVEL PLANS

Arrival Date: _____ at _____ AM/PM

Airline/Train: _____ Flight/train #: _____

Departure Date: _____ at _____ AM/PM

Airline/Train: _____ Flight/train #: _____

I plan on driving: (Y / N) Arriving on: _____ Departing on: _____

GROUND TRANSPORTATION OPTIONS

Deluxe Limousine Service: 413-821-0069

Michael's Limousine: 800-533-8470 or 413-533-8470

Valley Transporter: 800-872-8752 or 413-253-1350

(Please identify yourself as a guest of Smith College's Office of College Relations and we will be billed directly.)

Day Phone: _____

Fax: _____

Email: _____

Assistant Information: _____