

RIT EVENT PLANNING CHECKLIST & TIMELINE

Nine to Twelve Months in Advance Minimum (12 + months if able)

Review Guidelines & Policies Regarding Campus Events

- ☐ Review the RIT Events Planning 101 Resource Handbook, which includes RIT guidelines associated with event planning and RIT facility and service department checklists, timelines and contact lists
- ☐ Create an event planning checklist and timeline for the event

Event Planning Team

- ☐ Recruit event planning team and assign duties

Determine Scope of Event

- ☐ Determine the target audience
- ☐ Determine the event goals and objectives
- ☐ Determine the purpose, format and feasibility of the event
- ☐ Determine the preliminary event agenda

Select Date and Time

- ☐ Select the best date and time for the event (consider holidays, speaker availability)
- ☐ Check the RIT Events Calendar and RIT Academic Calendar to double-check for conflicts of space, other major functions, important participants, etc.

Budget

- ☐ Assess the budget and decide amount to allot for event (include facilities and support services)
- ☐ Figure out ways to fundraise if budget is insufficient (sponsorships, donations, etc.)

Seek Assistance for Event Protocol

- ☐ Determine who to contact to get the planning process started
 - ☐ Is the event sponsored by a student organization? If so, contact the Event Registration Office to begin the planning process.
 - ☐ Is the event sponsored by an RIT college, division or department? If so, proceed planning the event on your own.
 - ☐ Does an external constituent (client, vendor, etc.) want to hold an event on campus? If so, contact the Office of Government & Community Relations and Special Events & Conferences to begin the planning process.

Plan Event Program

- ☐ Create the event program schedule
- ☐ Determine logistical needs and which on-campus and off-campus support services are needed

Make Facility Arrangements

- ☐ Determine the type of facility(s) needs (include rain location if needed)
- ☐ Check availability and reserve space(s) with appropriate campus office(s)
- ☐ Determine hotel and/or on-campus residential housing needs
- ☐ Check housing availability, reserve rooms, sign room contract

Speakers, Entertainment

- ☐ Book master of ceremonies, speakers, entertainment
- ☐ Brief the event host/speaker with details

Confirm Availability of Key Support Services

- ❑ Advise key support services of event date and confirm they are available
 - Parking and Transportation Services
 - Brick City Catering (for food & beverage needs)
 - Dining Services (for dining hall meal needs)
 - Tech Crew, the Wallace Center Support Services and/or the Wallace Center Production Services (for AV needs)
 - Any other support services that are key to being able to hold the event

Attendee List

- ❑ Develop a preliminary guest list (University faculty/staff/students, VIP's, dignitaries, speakers, sponsors, etc.)
- ❑ Begin collecting addresses

Legal Affairs Requirement

- ❑ A contract is required for all events that are held on campus by an external client.
- ❑ If an internal department has a pre-existing relationship with an outside client that wants to hold an event on campus, the Office of Government & Community Relations may encourage the internal department create the contract. If this is deemed appropriate, the internal department will work with the Office of Government & Community Relations to obtain the contract template. If there are any legal questions, the internal department will work with the Office of Legal Affairs.

Global Risk Management Office Requirement

- ❑ Contact the Global Risk Management Office to determine the insurance requirements for the event and to make arrangements

RIT Events Calendar

- ❑ All events occurring on campus should be registered on the RIT Events Calendar. Once the facility and support services are confirmed available, register the event at <http://events.rit.edu>.

Six to Nine Months in Advance

Make Arrangements with On-Campus and Off-Campus Support Service Providers

- Contact Parking and Transportation Services to make parking arrangements, get parking passes, and obtain any associated costs
- Contact the Public Safety Office to determine any security requirements and any associated costs
- Contact Brick City Catering for catered food and beverage needs
- Contact Dining Services for dining hall meal needs
- Contact Facilities Management Services for rental items (tables, chairs, pipe & drape, stages, linens, tents, golf carts, etc), grounds requests (signage setup/ teardown, trash cans, mowing, turn off sprinklers, etc.), custodial requests (set up/ tear downs, special cleaning needs, restroom service, unlocking/locking requests for buildings/rooms, etc.)
- Contact Environmental Health & Safety if a tent permit is needed or are having fireworks or a bonfire
- Contact Tech Crew to request sound, lighting, electric, performance staging, etc. services
- Contact the Wallace Center Production Services to request Web/IT, photography, video production, video/media projection and real time captioning services
- Contact the Wallace Center Support Services to request classroom and auditorium AV technical support
- Contact Information & Technology Services to arrange access to RIT's network if needed
- Contact Access Services to request interpreters if needed
- Contact Print and Postal Hub with any printing needs
- Contact any miscellaneous on-campus support services for any remaining logistical needs
- Contact off-campus vendors for any miscellaneous needs (shuttles, buses, florists, decorators, etc.)

Website Design

- ❑ Create a website for the event, if applicable (include hotel reservation and travel information, agenda, registration page, etc.)

Audio Visual

- ❑ Plan audio-visual presentations

Event Promotional Plan and Materials

- ❑ Define your target audience
- ❑ Decide how you will notify them of the event (University News Services, e-blasts, save the date, invitations, posters, fliers, brochures, etc.)
- ❑ Check University Publications for RIT approved branding logos, colors and fonts
- ❑ Contact the Print & Postal Hub for submission and production timelines
- ❑ Create promotional distribution timeline
- ❑ Create promotional pieces and get approval
- ❑ Finalize and get approval of the guest list
- ❑ Prepare mailing labels for invitation mailing
- ❑ Update RIT Events Calendar with event details (if needed)

Giveaways/ Recognition Items/ Gifts

- ❑ Select and order recognition items (award, honor, citation)
- ❑ Order favors, souvenirs, printed folders, and other give-away items

Three to Six Months Ahead

Catering

- ❑ Select menus and submit them for approval

Décor

- ❑ Choose and meet with the florist, decorator, etc. and place orders

Program Content

- ❑ Make contact with program participants
 - Supply suggestions for their remarks
 - Gather their biographical information
 - Request a high resolution photo of each participant for publicity and programs

Protocol Approval

- ❑ Keep campus officials, deans, and administrative officers informed of your event plans, and ask for their support if warranted

Audio-Visual

- ❑ Finalize the audiovisual presentations

Security

- ❑ Update Public Safety on your event details (dignitary attendance, security needs, etc.)

Promotion

- ❑ Begin promotion plan (distribute promotion materials, etc.)

Signage

- ❑ Determine signage needs
- ❑ Call the Print/Postal Hub for submission and production time deadlines

Two Months Ahead

Logistics Plan

- ☐ Begin creating a logistics plan to document all arrangements, delivery dates/times, etc. as they are confirmed

Printed Materials

- ☐ Send out invitations 6 – 8 weeks prior to event
- ☐ Write and print the program and menu cards

Dignitaries

- ☐ Make hotel and transportation arrangements for out-of-town dignitaries and guests
- ☐ Mail an itinerary to dignitaries
- ☐ Secure other university representatives to assist

Signage

- ☐ Create and print external and internal signage (directional, welcome, etc.)

Promotion

- ☐ Continue promotion plan on schedule
- ☐ Continue distributing promotion materials

Props

- ☐ Order any ceremonial items needed such as flags, the university seal, ceremonial scissors

Decor

- ☐ Finalize decor

Facility Arrangements

- ☐ Finalize facility arrangements
- ☐ Inspect the facility and request repairs to hazards such as loose edges on stairs and upturned edges on carpeting

Event staff/Volunteers

- ☐ Determine where extra staff and volunteers will be needed (registration, escorts, greeters, etc.)
- ☐ Recruit

Risk Management Requirement

- ☐ Contact Risk Management to order temporary event insurance if needed

Two to Four Weeks Ahead

Event Registration/ RSVP

- ☐ Record and acknowledge RSVPs as they are received
- ☐ Prepare registration packets
- ☐ Send detailed instructions to all program participants with tickets, parking permits, and maps

Risk Management Requirement

- ☐ Obtain a certificate of insurance from the client and all external caterers if it is an external event

Legal Affairs Requirement

- ☐ Obtain the signed contract from the client (for external events only)

Program Content

- ❑ Write speeches and introductions, and get them approved

Props/Gifts/ Giveaways

- ❑ Take delivery on favors, mementos, novelty items and double-check for correct amount

Table Assignments

- ❑ Get table numbers made
- ❑ Enlarge a diagram of the room to be used as seating chart

ONE WEEK AHEAD

Interpreters

- ❑ Provide all speaker scripts to the interpreters for review before the actual event

Registration/RSVP's

- ❑ Ascertain the intentions of anyone who has not sent an RSVP
- ❑ Print out the guest list in alphabetical order
- ❑ Finish place cards, table cards, and/or name tags
- ❑ Create the seating chart

Event Staff/Volunteers

- ❑ Brief the greeters, escorts and volunteers on their duties

Gifts/Giveaways

- ❑ Gather all presentation items such as gifts, plaques, trophies.
- ❑ Collect ceremonial items.
- ❑ Designate one person to be in charge of transporting them to the event site and distributing them

VIP's

- ❑ Plan an arrival briefing for VIP's if necessary
- ❑ Prepare the briefing packet and send along with the guest list (with full names, titles, business and professional affiliations, and other specific interests), biographies, and the final schedule of events to the academic or administrative leadership or official host

Program

- ❑ Deliver prepared introductions, citations, and speeches to those who will read them

Reconfirm All Facility and Support Service Arrangements

- ❑ Facilities
 - Finalize details with all on-campus facilities
 - Finalize details with all off-campus facilities
 - Final residential housing count and rooming list due
- ❑ Publicity
 - Double-check publicity progress with University News - revise and update plans if necessary
- ❑ Support Services
 - Finalize details with all on-campus service departments and facilities
 - Provide final counts to Caterer and/ or Dining Services
 - Arrange with Public Safety and/or Facility Management Services to unlock rooms/buildings
 - Provide Public Safety and Parking/Transportation offices with final itineraries and VIP/dignitary information
 - Final details with all off-campus vendors
 - Create a production schedule outlining all deliveries, cues, and timing for the event
 - Drop off directional signage to Facilities Management Services for set up on day of event

Pack

- ❑ Prepare an event box with any supplies, such as tape, string, zip ties, staplers, clip boards, baskets, etc. that may be needed

Emergency Preparedness

- ❑ Create an emergency phone list including facility and support service contacts, other key contacts
- ❑ Be aware of the RIT Closing Procedures and Event Policies Regarding Closures

THE BIG DAY

- ❑ Arrive early
- ❑ Bring the logistics plan, support service and facility request confirmations, phone numbers, seating charts, name tags, table assignments, guest lists, and the event supply box
- ❑ Check all facilities and grounds
- ❑ Set up event venue with place cards, signs, favors, awards, signage, etc.
- ❑ Conduct sound and equipment checks
- ❑ Set up registration – be ready no later than 30 minutes prior to the start of the event
- ❑ Follow the logistics plan schedule
- ❑ Relax and smile

AFTER THE EVENT

- ❑ Send thank you notes to staff, volunteers and vendors
- ❑ Finalize billing and prepare final budget
- ❑ Conduct event debriefing
- ❑ Survey client, attendees, volunteers