

# SPECIAL EVENTS PLANNING WORKSHEET

The goal is to set the stage to provide a wonderful experience for guests of Juniata College.

Event Coordinator:	Event:	Date:	Time:	Location:
Group Invited:	Host/Hostess	# Invited	# Expected	Charge to Account #

Every special event must have an Event Coordinator. The Event Coordinator has these four primary responsibilities:

1. Determine the budget for the event and coordinate with those necessary to stay within it.
2. Complete this Planning Checklist.
  - (A) Fill in boxes at the top of the form.
  - (B) Place a check down the left-hand margin beside every task that needs to be completed. Not every task will need to be completed for every event.
  - (C) Assign each task that has been checked by putting the person's name in the 'Person Responsible' column.
3. Send a copy of the Planning Checklist to everyone whose name appears in the 'Person Responsible' column, to the host/ess, and to others who may need to know.
4. Follow up to ensure that all duties are completed prior to event.

Date/Time/Location

Person Responsible

- |   |       |
|---|-------|
| <input type="checkbox"/> Check the College master calendar for potential conflicts for the dates you are considering. The master calendar address is <a href="http://www.juniata.edu/calendar">www.juniata.edu/calendar</a> | _____ |
| <input type="checkbox"/> Select the date, time and location.  | _____ |
| <input type="checkbox"/> Reserve the date with host/ess.  | _____ |
| <input type="checkbox"/> Determine a rain location, if necessary.   | _____ |

Notes: \_\_\_\_\_

Event Scheduling Requests

Person Responsible

- |  |   |
|--|---|
| <input type="checkbox"/> Submit Event Scheduling Requests for each facility you are using for your event. By completing these requests, you will make arrangements for the physical set-up of your event, as well as any audio-visual needs. To complete an Event Scheduling Request, go to the following address on your web browser:<br><a href="http://www.intranet.juniata.edu/activities/eventsched.html">www.intranet.juniata.edu/activities/eventsched.html</a>   | _____   |
| <input type="checkbox"/> When completing your Event Scheduling Requests, don't forget to make the following requests, if necessary: <ul style="list-style-type: none"> <li><input type="checkbox"/> Have yards and entrances cleaned</li> <li><input type="checkbox"/> Have rooms/halls cleaned and repairs made</li> <li><input type="checkbox"/> Arrange for street cleaning, if needed</li> <li><input type="checkbox"/> Hang flags (JC, USA, international, etc.)</li> <li><input type="checkbox"/> Tents</li> <li><input type="checkbox"/> Tables/chairs</li> <li><input type="checkbox"/> Conference draping</li> <li><input type="checkbox"/> Coat racks</li> </ul> | _____<br>_____<br>_____<br>_____<br>_____<br>_____<br>_____ |

- Lectern, platform, stage \_\_\_\_\_
- Audio system \_\_\_\_\_
- Projector \_\_\_\_\_
- Screen \_\_\_\_\_
- Microphone \_\_\_\_\_
- Newsprint, chalkboard, markers, erasers \_\_\_\_\_
- Tape recorder \_\_\_\_\_
- Special lighting \_\_\_\_\_
- Arrange to have piano tuned, if applicable \_\_\_\_\_
- Arrange for sound check/practice with any AV equipment \_\_\_\_\_

Notes: \_\_\_\_\_

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Speakers/Entertainers

Person Responsible

- Invite guest speakers/entertainers \_\_\_\_\_
- Follow up invitation with letter containing date, time, location, suggested length of presentation, and other pertinent information \_\_\_\_\_
- Invite guest speakers/entertainers to appropriate pre/post events \_\_\_\_\_
- Arrange room accommodations where necessary \_\_\_\_\_
- Provide drinking water at podium \_\_\_\_\_

Notes: \_\_\_\_\_

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Invitations

Person Responsible

- Select invitations or draft letter of invitation and send to host/ess for approval (designate appropriate dress on invitation/letter). **NOTE:** Six weeks needed to produce a specially designed invitation \_\_\_\_\_
- Select guest list – check with Development and Alumni Office for suggestions \_\_\_\_\_
- Address envelopes for invitations \_\_\_\_\_
- Mail invitations (3 to 6 weeks in advance) \_\_\_\_\_
- Designate individual to collect RSVPs and provide with list of invitees \_\_\_\_\_
- Provide host/ess with list of those accepted \_\_\_\_\_

Notes: \_\_\_\_\_

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Food/Beverage/Decorations

Person Responsible

- Reserve the caterer \_\_\_\_\_
- Select menu \_\_\_\_\_
- Designate dress for wait staff \_\_\_\_\_
- Order linens \_\_\_\_\_
- Order special needs, i.e. glassware, additional serving pieces, etc. \_\_\_\_\_
- Order Juniata napkins \_\_\_\_\_
- Order flowers, candles, etc. \_\_\_\_\_
- Reserve bartender \_\_\_\_\_
- Obtain bar stock \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_

Printing/Handouts

Person Responsible

- Have tickets printed \_\_\_\_\_
- Have programs/agendas printed **NOTE:** Six weeks needed for specially designed programs if printed off campus \_\_\_\_\_
- Distribute agendas as needed \_\_\_\_\_
- Mail pertinent information to guests, i.e., campus map, area map, area accommodations, area restaurants, airport information, college information, important phone numbers, etc. (1 month in advance) \_\_\_\_\_
- Obtain name tags, pens, other needed supplies \_\_\_\_\_
- Have all printed materials available at meeting/event \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_

Public Relations

Person Responsible

- Write initial draft of news release (send before or after event?) \_\_\_\_\_
- Reserve photographer (professional, in-house, etc.) (B&W, color slide, etc.) \_\_\_\_\_
- Contact External Relations regarding proper use of school logo \_\_\_\_\_
- Contact Audio Visual department to make tape recording/video of event \_\_\_\_\_
- Contact External Relations regarding closed circuit televising, etc. \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_

Security

Person Responsible

- Notify security of event and arrange for:
  - Parking (include handicapped/VIP) \_\_\_\_\_
  - Doors/gates to be opened \_\_\_\_\_
  - Barricades \_\_\_\_\_
  - Shuttle service \_\_\_\_\_
  - Special security needs \_\_\_\_\_
- Arrange for on-campus first aid station and contact area emergency personnel for large events \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_

Signage

Person Responsible

- Put up needed direction signs inside and outside, i.e., parking, rest rooms, telephones, event locations, information desk, first aid, elevator/handicapped access, special seating, etc. \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_

Speech Preparation

Person Responsible

- Draft remarks for president (see instructions for President's speeches)
- Draft remarks for speaker

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Notes: \_\_\_\_\_  
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Seating

Person Responsible

- Prepare seating chart and determine if/how to display
- Order place cards (calligraphed? Yes No )
- Prepare table numbers and determine how to display
- Arrange for reserved seating for VIP/handicapped guests, to include marking reserved sections with signs, cords, etc., notifying special seating guests of reserved sections, escorting guests to reserved section.

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Notes: \_\_\_\_\_  
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Hospitality

Person Responsible

- Arrange for student ambassadors/ushers and brief them on event, i.e., time to arrive, appropriate dress, duties, length of events, etc.
- Arrange escorts for those at head table or on dais
- Arrange escorts for those with special needs/VIP seating
- Provide umbrellas during inclement weather
- Arrange for signer (for hearing impaired) for large events
- Arrange for advance ticketing
- Inform those to be in the receiving line
- Organize one-direction traffic near receiving line
- Greet guests and manage traffic
- Arrange special accommodations as necessary
- Order favors/gifts
- Arrange for coat check, if needed, to include staffing, stubs
- Make advance arrangements on how to handle the check, gratuities, honoraria, expenses, and rides for special guests

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Notes: \_\_\_\_\_  
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Rain Plan

Person Responsible

- Prepare a rain plan

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Notes: \_\_\_\_\_  
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Just Before the Event

Person Responsible

- Check all rooms, including rest rooms. Are they clean, in good repair, temperature/ventilation comfortable, window shades drawn evenly, sufficient lighting, unnecessary chairs/furniture removed, windows clean, light bulbs working, ceiling tiles in place, audio-visual working, seating adequate, etc.
- Check outside buildings being used. Is area clean and neat, free of trash, cigarette butts, etc., porches swept, grass and landscaping in good order, trash cans and cigarette urns empty, etc.

\_\_\_\_\_

\_\_\_\_\_

Following the Event

Person Responsible

- Evaluate event and make notes to improve future event.
- Get pictures and send final news release by \_\_\_\_\_  
(date)
- Thank those who should be thanked
- Send pictures
- Send host/ess list of invitees with "A" by those who accepted and "O" by those who came
- Return all borrowed items, i.e., furniture, plants, etc.
- Compare final costs with budget
- Pat yourself on the back!

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