

## **Event Checklist:**

### **#1 Key to Success: Begin planning as soon as you know you will be having an event!**

- Identify the month in which you want the event to take place. Give yourself at least 6 weeks (about 1 and a half months) to complete the following steps.
- Submit a College of Liberal Arts Funding and Event Request Form, if the event doesn't have allotted funding (Berger Lecture, Community of Scholars Lecture, etc.). Determine your budget. Think about honoraria, travel, advertising, etc.
- Identify speakers whose lecture fees fit within that budget. Contact those speakers to determine availability and possible speaking dates.
- Have the Dean's office personnel check the Dean's Calendar to determine which proposed dates are open. Check the Events page on the COLA website to see if any major events are happening on the proposed dates.
- Check with Scheduling Services to determine if there is an appropriate room available for each of those dates.
  - Have your AA reserve the appropriate venue for the program (i.e. Kleymeyer Hall, Mitchell Auditorium, Carter Hall, the Forum, etc.). Indicate to Scheduling Services if you have any special needs (e.g. an extra table, special podium, sound equipment).
- Contact the speaker to confirm the engagement.
- Work with University Communications or the LA Marketing Coordinator, Shari Baird, on a press release and placing your event on the University Calendar.
- Work with the speaker/Jillian Jones on a contract agreement.
  - Have the speaker go to the USI Procurement website and click "How to become a USI Vendor" on the left-hand side. Have them fill out the vendor registration form.
  - You will fill in the attached speaker agreement form and send it to the speaker. The speaker will need to fill out their name, address, and phone number in the first section (Payment Information) of the agreement. They will need to sign the agreement on the last page. Once the agreement is signed, send the agreement to Jillian Jones. They will attach the form to a BuyUSI requisition after the speaker has submitted their online registration and Procurement has set them up in BuyUSI. Strike through any sections that are not applicable to this speaker. i.e. Sales, Publicity, certain insurance requirements, etc.
  - Once the requisition is completed, Jeff Sponn will sign the contract once it comes to Procurement via BuyUSI.
  - Procurement will send the purchase order to Accounts Payable.
  - Accounts Payable will pay the speaker according to our payment terms.

- ❑ **At least three (3) weeks prior to your event**, have the LA Marketing Coordinator design your print materials and send them to Copy Services or print in the workroom (depending on budget). Make sure your advertising includes:
  - Name of the event/speaker
  - Day of week, Date, time, location
  - Brief description (2-3 sentences)
  - Sponsoring organization/s
  - USI College of Liberal Arts logo
  - Contact person
- ❑ **At least three (3) weeks prior to your event**, contact USI Photography to cover your event. If you wish to have your event recorded, please reach out to IT for setup.
- ❑ **At least three (3) weeks prior to your event**, you should send a campus-wide email announcement. Send follow-up announcements within a few days of the event.
- ❑ **At least three (3) weeks prior to your event**, contact USI Catering (catering@usi.edu) for food services (if any).
  - Give the contract to Jillian Jones after you have reviewed it and signed it as the event contact. Jillian will have Dean Rode sign as financial manager and enter the contract in BuyUSI.