Dietrich School of Arts and Sciences
Intake Checklist

While not all-inclusive, these prompts can help guide your conversation with faculty members requesting your assistance in planning their events.

Type of Event
- Conference
- Lecture
- Meeting
- Panel Discussion
- Reading
- Reading/Book Signing
- Symposium
- Workshop
- Other ______________________

Contact Person/Decision Maker
- Name
- Address
- Telephone number/Fax number
- E-mail

Budget
- Source of funds
- Account numbers required (travel, entertainment, accommodations, honoraria, printing, flowers, labor, office supplies, photographer, disability accommodations, etc.)

Venue
- Location(s) for event (not all preferences can be accommodated, will depend on availability, capacity, etc.)
- Location for reception
- Location for dinner
- Rental or lease agreement

Disability Access and Accommodations for Speakers, Special Guests, and Participants
- Accessible location
- Special transportation
- Accessible hotel room
- Lowered podium
- Wheelchair access to stage
- Special seating section
- Sign language interpreter

Speaker/Panelists
- Invitation
Background information (CV; publicity photograph; title of lecture, if applicable; audio and video release forms, if applicable; background reading material, if applicable)
Speaker’s/panelists’ contact information, including telephone numbers
Honorarium
Campus escort(s)
Travel plans
Accommodations
Ground transportation between airport/hotel and campus
Campus shuttle transportation
Parking/parking passes
Identify individual to introduce speaker/panelists at event and/or moderate panel
Thank you/honorarium and expense reimbursement
One of three guest speaker agreements is required and must be signed BEFORE the event
A W-9 is required if an honorarium is paid

VIPs
Invitations
Travel plans
Campus escorts
Accommodations
Ground transportation between airport/hotel and campus
Campus shuttle transportation
Parking/parking passes

Invitations
Design/Printing/Email
Guest list
Include campus map on invitation?
Response deadline date (for Campus Catering, Facilities, etc.)
Person/telephone number to whom to respond
Internal distribution, if appropriate
Extra invitations for archive files?
Name and telephone number of contact person

Food
Budget
Menu-planning (mindful of dietary restrictions)
Number of tables and chairs for dining
Number of chairs at head table
Flowers
Linens
Final guest count
Place cards?
Host/Emcee
Schedule of evening/timeline
Podium and microphone
- Photographer
- Coat rack

**Registration**
- Tables/Chairs/Linens
- Name tags
- Conference/Meeting Information Packet/Pencils/Pens
- Promotional Items (if desired)
- Information table (staffing? materials from department?)

**AV**
- Overhead projector
- Slide projector
- CD player
- DVD player
- Laptop
- Podium with microphone (podium seal?)
- Lavaliere (small clip-on microphone)
- Microphones for panel
- Laser pointer and clicker