Event ROLES AND RESPONSIBILITIES



|  |  |  |  |
| --- | --- | --- | --- |
|  | Event team partner | flf | AdCo |
| vision, goals and advancement strategy of event | * Advise on best practices
 | * Determine goals of event and alignment to advancement strategies
* Communicate clear vision to stakeholders
 |  |
| event onboarding | * Set up meeting with FLF and AdCo to determine all planning needs
* Build production schedule
* Onboard event in ProofHub and determine deadlines with communications colleagues
 | * Submit event request form
* Attend onboarding meeting and share all known event information
* Review production schedule and note responsibilities
 | * Attend onboarding meeting
* Review production schedule and note responsibilities
 |
| AUDIENCE DEVELOPMENT | * Assist with data requests, if necessary
* Facilitate contact list sharing for email and mailing
* Submit PARF or PGR calendar request, if applicable
 | * Determine audience and assemble contact lists for mail and email
* Determine leadership attendance
* Liaise with hosts and key volunteers to get guests in the room
* Perform call downs
 | * Assist with building of contact lists
 |
| COLLATERAL | * Define collateral needs
* Project manage creating, designing and production of all collateral
 | * Communicate all collateral needs
* Assist in writing and reviewing collateral copy
* Review collateral and route to stakeholders for review
 | * Assist with sending of collateral
* Prepare pre-apps for all collateral purchases
 |
| registration | * Advise on best practices for registration options
* Facilitate building of Cvent registration, if needed
* Set up Reportal real-time RSVP list if Cvent is used
 | * Select best registration path for audience
	+ If online registration, real-time reg lists available in Reportal
* Provide all host, speaker, and special guest names to AdCo for manual registration
 | * Serve as contact for registrants, take calls and email for registrations
* Maintain manual excel RSVP list if Cvent not used
* Prepare nametags, table cards, etc.
 |
| VENDOR MANAGEMENT | * Hire and manage event vendors including caterers, valet, A/V, coat check, florists, etc.
 | * Determine any preferred vendors from hosts
 | * Assist with event vendors and orders
 |
| budget | * Create and maintain event specific budget in excel
* Monitor invoices and payments
 | * With senior director, set budget for event
 | * Prepare pre-apps and give to Brianna for tracking
 |
| PROGRAM DEVELOPMENT | * Advise on event and program flow
* Review scripting and any AV
* Format script for podium
 | * Liaise with faculty, hosts, and all other speakers
* Define program elements and key points
* Write script in alignment of program goals
 |  |
| Briefings | * Write master event brief and event timeline
* Prepare briefing packets 1 week prior to event
* Send briefing packets to internal recipients
 | * Access and share master event brief and timeline as needed
* Determine list of briefing packet recipients and materials needed (options: brief, timeline, RSVP list, remarks, bionotes)
* Send briefing packets to high-level stakeholders
 | * Prepare bionotes, if needed
* Review event brief
* Assist with sending briefing packets
 |
| day-of event | * Set up for event
* Staff event, manage registration, vendors, logistics, volunteers, etc.
 | * Staff event and manage high-level stakeholders
* Mingle with donors and build relationships in the room
* Answer donors’ questions
 | * As needed, assist with set up and staffing of event
 |
| post-event | * Reconcile attendees and provide final guest list to Advance and finance team
* Share final guest list with FLF
* Fill out post-event evaluation form
 | * Follow up with attendees to continue building relationships
* Send thank you notes to hosts, key volunteers, and speakers
 | * Assist with post-event reconciliation
* Coordinate thank you notes and photo follow up as needed
 |