

# Event Planning at Bank Street:

## A Comprehensive Set Of Guidelines



# How to Plan an Event at Bank Street

Do you need help planning an event? If yes, here are next steps and supporting materials for you to download.

**First**, confer with your division head or division designee for approval of your event idea.

**Second**, download the [Event Pre-Planning Aide & Guidelines](#) and answer as many questions as possible. This document will help you know where to go and who to talk to for placing your requests.

**Third**, please fill out the [Event Overview Form](#) as soon as possible. The sooner, the better, because you will need to know if your preferred dates, times, and spaces are available before proceeding with your plan.

**Fourth**, download the [Event Planning Checklist](#) and the [Event Budget Checklist](#) and tailor them to your event.

If you would like guidance after your form and checklists are completed, please contact [Linda Reing](#).

# Event Pre-Planning Aide & Guidelines

This document is designed to help you through the basics of planning and preparing for a successful event at Bank Street College of Education.

## I. Identify Objectives & Needs

Complete the [Event Overview Form](#).

- Additional things to think about:
  - Who is your audience?
  - Does your event have a limited audience? If so, how will you determine who can attend? For example, do you want to invite only current parents or only the alumni from your specific program?
  - What do you want attendees to learn or experience from your event?
  - Do you have enough time to make all necessary arrangements? For example, is there time allotted for you to book the specific presenter or panel members that you want?

## II. Establishing Budgets

A budget is necessary for getting the things you need to put your event together. Budgets help establish a guide for spending on food and beverage, materials, decoration, etc.

- See the [Event Budget Checklist](#) and complete the items that are appropriate to your event.
- Meet with your Divisional Budget Officer to see where your event expenses should be charged.
- Contracts are often required for vendors, catering, speakers, or musicians. Read the contracts carefully and give them to your Divisional Budget Officer to approve and process.

## III. Scheduling Facilities, Catering, and Equipment

### Room Reservations

Complete your [Event Overview Form](#). Make sure to place your space request as soon as possible to see what rooms, dates, and times are available. If you already have access, place a request in the EMS system. To place a space request through Bank Street's Room Reservation System, please contact [Akoshia Robinson](#) for instructions. You will need to enter basic set up information in the EMS system once you are guaranteed a space.

Before making your room request, please decide the following in advance:

- How many chairs and tables will you need?
- How do you want the room set up?
- Will you need a lectern, coat rack, or other equipment?

The building is open on Saturdays between 8:00 am and 5:30 pm. Saturday hours outside this time frame are available by special arrangement only. The College is closed on Sundays. Therefore, all Sunday events will have additional security, maintenance, and cleaning costs attached. If you want to schedule an event on a weekend, please contact [Carlos Esquivel](#) to make sure the building will be open.

After your room request is confirmed, please contact [Carlos Esquivel](#) and [Dan Benchimol](#) one week prior to your event to reconfirm all set up details. Your set up details should be entered in the EMS system, but for more complicated set ups or set ups in multiple locations, please also email a detailed diagram to [Carlos Esquivel](#).

### **Catering and Rentals**

Please email all in-house catering requests to [Cori Boudreaux](#). For suggestions on outside catering options, see below:

- [Fairway](#)
- [West Side Market](#)
- Milano Market, 2892 Broadway, New York, NY 10025; Phone: (212) 665-9500
- [Carmine's](#)

For larger events with higher-end catering, try the following high-end caterers. These caterers have arrangements with vendors if you need to rent chairs, tables, stemware, china, etc. Rentals are charged separately.

- [Eathereal Kitchen](#)
- [Great Performances](#)

If your event requires rentals, but you are not booking them through a caterer, these are some suggested vendors:

- [Broadway Party Rentals](#)
- [Party Rental LTD](#)

### **AV Equipment and Support**

For audio/visual equipment and technical support for your event, please submit your request to [Helpdesk](#) and cc [Lizzy Denning](#). Please note that AV support may incur additional costs based on your needs. Please confirm with IT.

## **IV. Publicity**

Internal publicity is vital to the success of your event. To get the word out about your event, you can:

- Post your event listing on the website, including an EventBrite RSVP link for tracking confirmed guests

- Feature an event listing on the video monitor in the lobby
- Post signage in the lobby or flyers near the elevator banks at West 112th Street
- Feature a save-the-date announcement in a newsletter

For assistance with the above, please reach out to the contacts below:

- School for Children events: [Kate Marcus](#)
- Graduate School events: [Gretchen Adams](#)
- Listing in the alumni newsletter: [Linda Reing](#)
- For an event hosted by other Divisions or Centers across the College, please contact your supervisor

## V. Implementation Plans

Please use the [Event Planning Checklist](#) to help you determine your needs before, during, and after the event. These include equipment, registration tables, special AV, etc. Even small details should be noted on your checklist.

- Assign tasks and roles appropriately.
- Make your expectations clear as to who will perform tasks and roles.
- For assistance with hiring a photographer or videographer, please contact [Communications](#).
- Submit a timeline and/or script to speakers, panelists, and key event participants prior to your event.

## VI. Post-Event Evaluation

Keep an evaluation on file so that you can refer to it for your next event:

- Audience feedback
- Presenter's experience
- Your thoughts and recommendations for next time
- Were the goals and objectives met?
- What went well?
- What could have gone better?

## VII. Additional Tips & Suggestions

- Don't compromise on details. No detail is too small.
- Don't assume anything or allow situations to become uncertain. Contact colleagues for assistance.

# Sample Templates

# Event Overview Form

for determining your proposed event's specific needs

Title of event: \_\_\_\_\_

Sponsoring organization, department, or division: \_\_\_\_\_

Staff member in charge of event: \_\_\_\_\_

Extension #: \_\_\_\_\_ Email address: \_\_\_\_\_

Date of event: \_\_\_\_\_

Beginning time of event: \_\_\_\_\_ Ending time of event: \_\_\_\_\_

Location of event: \_\_\_\_\_

Expected attendance: \_\_\_\_\_

Description and purpose of event: \_\_\_\_\_

\_\_\_\_\_

Is the President expected to attend? \_\_\_\_\_

Are Trustees expected to attend? \_\_\_\_\_

Does this event require additional staffing support? \_\_\_\_\_

How will this event be financed? \_\_\_\_\_

(See your Divisional Budget Officer for approval and confirmation)

Any questions about this form may be directed to Linda Reing.

# Event Planning Checklist

Event Information			
Event title:			
Event date/time:			
Event location:			
Staff member in charge:			
Charge to division:		Budget #:	
# of expected guests:			

General Requirements	
Calendar event post:	
Website news post:	

Room Reservation	
Locations(s):	
Dates/Times requested:	
Request submitted:	
Confirmation received:	

Facilities Management			
Set-up date/time:		Breakdown date/time:	
Request submitted:		Confirmation received:	
Reconfirm with plant staff one week in advance via email:			

Catering	
Food/Beverage needs:	
Set-up time:	



Request submitted to Bank Street kitchen:					
Outside catering arrangements:					
<b>Media Services</b>					
AV needs (PowerPoint, screen, Wi-Fi, microphone(s), lighting):					
Set-up date/time:		Sound check date/time:		Breakdown date/time:	
Requested submitted:		Confirmation received:			
<b>Communications</b>					
Communications/ Publicity:	<input type="checkbox"/> Social Media <input type="checkbox"/> Newsletters <input type="checkbox"/> Printed Invitations <input type="checkbox"/> Email Invitations <input type="checkbox"/> Online RSVP <input type="checkbox"/> Featured on website <input type="checkbox"/> Other				
Collateral needs:					
<b>Miscellaneous</b>	Assigned to:				
<input type="checkbox"/> Nametags					
<input type="checkbox"/> Place Cards					
<input type="checkbox"/> Tent Cards					
<input type="checkbox"/> Invitations					
<input type="checkbox"/> Entertainment					
<input type="checkbox"/> Photographer					
<input type="checkbox"/> Videographer					
<input type="checkbox"/> Décor					
<input type="checkbox"/> Flowers					
<input type="checkbox"/> Signage					



# Sample Event Budget Checklist

## Expenses

Site	Estimated	Actual	
Microphones (how many)		\$0.00	\$0.00
Projector		\$0.00	\$0.00
Laptop		\$0.00	\$0.00
Other AV Equipment		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>

Decorations	Estimated	Actual	
Flowers		\$0.00	\$0.00
Signage		\$0.00	\$0.00
Balloons		\$0.00	\$0.00
Event décor		\$0.00	\$0.00
Linens		\$0.00	\$0.00
Paper supplies		\$0.00	\$0.00
Misc. Charges (itemize)		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>

Publicity	Estimated	Actual	
Poster		\$0.00	\$0.00
Photocopying/Printing		\$0.00	\$0.00
Flyers		\$0.00	\$0.00
Postage		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>

Prizes	Estimated	Actual	
Plaques / Awards / Medals		\$0.00	\$0.00
Gifts / Give-aways		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>

## TOTAL EXPENSES

Estimated	Actual
\$0.00	\$0.00

Design & Printing	Estimated	Actual	
Stationery supplies		\$0.00	\$0.00
Pens/markers		\$0.00	\$0.00
Name tags/holders		\$0.00	\$0.00
Place cards		\$0.00	\$0.00
Thank you cards (or small gifts)		\$0.00	\$0.00
Programs		\$0.00	\$0.00
Brochures		\$0.00	\$0.00
Misc. Charges (itemize)		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>

Refreshments	Estimated	Actual	
Food		\$0.00	\$0.00
Beverages		\$0.00	\$0.00
Paper goods		\$0.00	\$0.00
Catering Staff		\$0.00	\$0.00
Delivery tips & gratuities		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>

Program	Estimated	Actual	
Performers		\$0.00	\$0.00
Speaker / Honorarium		\$0.00	\$0.00
Travel		\$0.00	\$0.00
Photographer		\$0.00	\$0.00
Videographer		\$0.00	\$0.00
Staff overtime		\$0.00	\$0.00
Misc. Charges (itemize)		\$0.00	\$0.00
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>