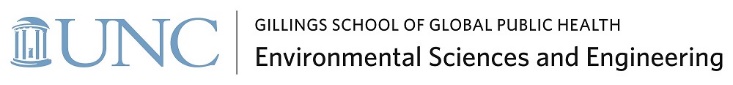
** Checklist for Guests and Seminars**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Who Does? | Due | Date Completed/Notes |
| **At least 3 weeks in advance (when possible)** |  |  |  |
| **Faculty speak with Department Chair if it is a Department-level event:** to discuss what expenses will be covered, and who will pay for these. Faculty arrange their own guest schedules |  |  |  |
| **Faculty teaching schedules:** review faculty teaching schedules to find the time when most (or most relevant) faculty are available. (This is usually at the time when the faculty meetings are scheduled for that semester) |  |  |  |
| **Consider avoiding other scheduled events:** [UNC-CH events](https://www.unc.edu/events/) (difficult to find hotel rooms around [sporting events](https://m.unc.edu/athletics_calendar/events?feed=all-sports-schedule&id=vcal_17068-goheels.com%7C20190117T000001&calendarMode=list&startdate=17-01-2019%20T000000), holidays, and graduation), [Gillings Events](https://sph.unc.edu/events-calendar/category/school-calendar/), and other Department and CEHS events |  |  |  |
| **Seminar Room**: compare best faculty teaching schedule availability with room availability and see if a suitable seminar room is available at that time. [**Reserve** room](https://sph.unc.edu/rooms/). |  |  |  |
| **Recording:** Some rooms have “[mediasite](https://sph.unc.edu/iis/mediasite/)” lecture capture availabilities. [Verify room options and schedule online](https://courses.sph.unc.edu/mediasite_request/?_ga=2.93923675.754820835.1547579314-537185464.1531846014) (also [read rules](https://sph.unc.edu/iis/mediasite/) on the A/V webpage). If your room is not listed, [contact A/V](https://sph.unc.edu/iis/av-services/) about recording (and/or live broadcast through Zoom ). Set up a [Zoom account](https://sph.unc.edu/iis/zoom/) if necessary. |  |  |  |
| **Contact guest:**   * ask for their needs re travel (flight, taxi, hotel) * request flyer materials:   -High resolution photo, title, and short bio.  -Let them know if it will be recorded and send them the [media release form](https://courses.sph.unc.edu/mediasite_request/docs/RecordingRelease_SPH.pdf?_ga=2.126773579.754820835.1547579314-537185464.1531846014)   * Send reimbursement forms to bring with them (W-9, direct deposit form, bring a voided check) |  |  |  |
| **Reserve Hotel** and send confirmation to guest Carolina Inn OR send a hotel list to faculty member if they are arranging everything. Print reservation and write purposed and chartfield on it for fiscal office |  |  |  |
| **Create flyer using template** (must have the most recent Gillings logo on it) |  |  |  |
| **Create a Doodle poll:** for every 30 minutes of the day, from 7:30am-7:30pm, allowing some time for lunch and seminar set-up. **Provide a deadline** 2 weeks before the event/visit |  |  |  |
| **Send flyer announcement and Doodle Poll:** to [envr\_all@listserv.unc.edu](mailto:envr_all@listserv.unc.edu) (includes faculty, staff, students, incl. Emeritus, adjuncts, joint) |  |  |  |
| **Send flyer only to:** [envr\_seminars@listserv.unc.edu](mailto:envr_seminars@listserv.unc.edu)  (if relevant - reps from IE, IMS, DMS, NCSU, Duke, Chancellor’s Assistant) |  |  |  |
| **Post flyer:** on ESE bulletin board |  |  |  |
| **Announce Seminar to Gillings:** complete [Gillings Comm form](https://sph.unc.edu/comm/announcements-form/) for calendar, newsletter, and hallway monitors and email the flyer to [sphcomm@listserv.unc.edu](mailto:sphcomm@listserv.unc.edu) |  |  |  |
| **Share** the guest information with the Chair’s Assistant, Dean’s Office, Advancement Office (if Alumna/us), and OSA, other department(s) for forwarding to their lists |  |  |  |
| **At least 2 weeks before** |  |  |  |
| Send a **reminder** re the seminar and Doodle Poll |  |  |  |
| **Breakfast Reservation** if relevant – (have it billed to the guest’s room if they are staying at Carolina Inn so that it is included on the billing form – same if lunch or dinner is there) |  |  |  |
| **Dinner Reservation –** have it billed to the department |  |  |  |
| **Lunch Catering** (the latest for most restaurants is really one week before but a few may be flexible) |  |  |  |
| **At least 1 week before** |  |  |  |
| **Finalize schedule** (with plenty of breaks if a full day) **and send** to the guest and to those scheduled for meetings (and chair even if not on the schedule) |  |  |  |
| **Ground Transportation:** Reserve car/taxi/faculty member to pick up guest from airport |  |  |  |
| **Send to guest:**   * final schedule * if not a vendor: a W-9, direct deposit form, and ask them to bring a voided check with them * taxi service contact information * cell phone of whoever they might be having breakfast with (and/or host) |  |  |  |
| **Day of Event** |  |  |  |
| **Guest Welcome:** Meet guest with reimbursement forms to complete if they haven’t already (W-9, direct deposit form, media release, and collect voided check) |  |  |  |
| **Lunch Arrival** (if relevant)**:** Meet caterers, collect receipt, and set up lunch for students or others |  |  |  |
| **Seminar Preparation:**   * Bring water, flyer to tape on seminar room door, and camera and take some pics (and slides if you already have them) * Meet presenter and upload their slides or connect laptop * Check that any relevant Zoom or recording is okay |  |  |  |
| **Post-event** |  |  |  |
| * Collect any accounting paperwork, fill out the business entertainment form and send to fiscal office |  |  |  |
| * Submit an reimbursements to guest(s) |  |  |  |
| * Submit any voucher requests for meals that took place in a restaurant |  |  |  |
| * Pay any catering that was delivered with the P-card (through the online invoice or once invoice is mailed) |  |  |  |