ImmunoX Events Form & Checklist:
Eco-Seminar

Please read the events guideline document before starting to plan an event.

# Beginning of Series checklist

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| --- | --- | --- | --- | --- | --- |
| Task | Task | Due date | Assigned to | Status(In Progress, Completed, Not Started) | Notes |
| 1 | Bucket someone as eco/non-eco | January for the next school year |  |  | Offer to everyone. Priority goes to East Coasters |
| 2 | Determine if Genentech is interested in speaker | January for the next school year | Jon |  |  |
| 3 | Determine Host | January for the next school year |  |  |  |
| 4 | Give basic explanation to speaker | January for the next school year |  |  |  |
| 5 | Book Room | Book Fall dates in early summer;Book Winter dates in early fall;Book Spring dates in early winter |  |  |  |
| 6 | Book Super Breakfast/Facilities Event Set-up Order | August of current series | Jon |  |  |
| 7 | Event on website | August of current series | Isabelle |  | Can be done as soon as sponsorship situation is clarified. Method depends on venue policies |

# Pre-event checklist

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| --- | --- | --- | --- | --- | --- |
| Task | Task | Due date | Assigned to | Status | Notes |
| 1 | Follow up with speaker | 3.5 months out | Jon/Isabelle |  | Ask who they’d like to e-meet with, fill out W-9 for reimbursement, give detailed explanation of schedule, request talk title and biosketch |
| 2 | Loop in host:TBD | 2 months out | Jon |  | Give detailed schedule. Explain recruitment needs (postdocs for lunch) |
| 3 | Confirm with speaker the progress of recording their seminar | 1.5 months out | Jon |  | Set deadline to 2 weeks out to receive recording and run through IT dept.  |
| 4 | Send out offer to faculty (1st round: Speakers interest, 2nd round: Full faculty) | 1 month out | Jon |  | Create Qualtrics. Choose theme/title for their meeting. Bring in 1-2 postdocs and have them submit a title for their talking points  |
| 5 | Confirm which faculty + postdocs have meetings with the speaker | 3 weeks out | Jon |  |  |
| 6 | Confirm with speaker their lunch order and order it | 2 weeks out |  |  | ImmunoX will purchase their order. Make sure that they give us their detailed orders and delivery instructions. |
| 7 | Mailchimp email reminder | 1 week out | Jon |  |  |
| 8 | Remind host to arrange ‘lunch’ | 1 week out | Jonathon |  |  |
| 9 | Set up zoom using ImmunoX account | 1 week out | Isabelle |  | First, Zoom for Speaker’s talkSecond, Zoom for rest of day |
| 10 | Check-in with Catering Company for the Super Breakfast order | 1 week out | Jon |  |  |
| 11 | Email host reminding of host duties | Friday before | Jon |  | Remind them to set up podium mini-Mac with the zoom and introduce the speaker |
| 12 | Email reminder to speaker with their zooms | Friday before | Jon |  | Include rundown |
| 13 | Email individual faculty + host their zooms | Friday before | Jon |  |  |
| 14 | Add to weekly newsletter | Friday before |  |  |  |

# Day-of event checklist

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| --- | --- | --- | --- | --- | --- |
| Task | Task | Time | Assigned to | Status | Notes |
| 1 | Receive food | 830 am PST |  |  |  |
| 2 | Confirm that speaker’s lunch order is received | 10 am PST |  |  |  |

# Post-event checklist

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Task | Task | Due date | Assigned to | Status | Notes |
| 1 | Reimburse host | 45 days post |  |  | Fill out expense report with receipts to receive reimbursements. Include event form, attendance |
| 2 | Process Honorarium | End of the month |  |  | $200 |

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