Event Planning Checklist

• Strategy
  o What is this event trying to accomplish?
  o Who are you trying to target?
  o How does it fit into your unit’s overall strategic plan?
  o Is this event scalable? Could it become an event series/road show for several locations?

• Date, time, location of event
  o What is the date of the event?
  o What is the best location?
  o What time of day best suits an event of this nature?
  o How do local trends, traffic, travel habits, and workdays affect the timing of this event?

• Size of event
  o Ideal number for optimum guest experience and to achieve goals
  o Physical capacity of space, amount of available seating, comfort of guests
  o Budgetary limitations

• Budget and Timeline
  o Who will cover what portion of costs? Who approves?
  o What deadlines must be established to ensure that event plans continue smoothly?
  o How will anticipated travel and other conflicts impact those deadlines?

• Guest List
  o What criteria will be used to determine invitation list?
  o What other units across campus might be interested in partnering?

• Invitations / Hold the Date / RSVP
  o What is more appropriate for the event - email or printed?
  o If printed, what is the best design concept in terms of shape, size (fold/no-fold, envelope/self-mailer, etc)?
  o What visual elements, imagery, logos, or color schemes do you want to use?
  o Will a Save The Date be necessary? Best “drop” date?
  o Best drop date for the mailed / emailed invitation?
  o Will follow up calls / emails be necessary?
  o What is RSVP due date?
  o Who is the contact for the RSVP?
  o Is there a web link / landing page / hashtag that could be included?
  o What kind of confirmation will registered guests receive?
  o Are there maps / directions that could be included?
• Catering / Food & Beverage
  o Determine menu concept (light or heavy hors d’oeuvres? Meal served?)
  o Any special themes relevant to the program?
  o Does host or venue have a preferred caterer? Is that caterer required or simply preferred? Are other suggestions available in order to get comparison proposals?
  o What items can the venue provide and what items should the caterer bring including plates, utensils, glasses, trash containers, and appropriate tables?
  o Can caterer provide beer and wine? If not, how will that be procured? Is a temporary alcohol permit necessary?
  o Have special dietary requests been considered?

• Physical set-up
  o Where will reception be? Where will program be?
  o If outdoor, what is rain plan?
  o What style seating is desired for program and/or reception?
  o Is a sound system required?
  o What branding can be incorporated throughout the space?
  o Where will catering be staged and served?
  o Is there room for registration table? Where is the best placement?
  o Coat check needed? Where is the best placement?
  o Are there any physical challenges presented by the space or the layout that need to be addressed (steep hills, narrow paths, grass (heels), sight line issues, etc.)?
  o Housekeeping or grounds keeping necessary? (Pressure wash? Blow leaves?)

• Décor & Signage
  o Color scheme? (see brand.osu.edu/color/ for color palette info)
  o Is any special signage required for the space?
  o Any other needs for décor or special items like balloons, flags, banners, etc?

• Sound / Music / AV / Entertainment
  o Is house/venue sound system adequate?
  o Is there ambient music? Live music? Trio, piano, etc.
  o What other entertainment is appropriate?
  o Any video needs for presentation (imag or PPT)?

• Parking/Directional Signage/Security
  o Is there sufficient parking space on property for self-parking?
  o Is valet or shuttles required due to insufficient space or other physical challenges presented by the setting?
  o Is there any outdoor signage needed in the area to denote event?
  o Is any security needed during the event?
  o Have all appropriate permits been filed?
• Program
  o Have VIP calendars been held?
  o Are the speakers dynamic? Is there diversity in the line up?
  o Length and style of program – what is appropriate?
  o Is printed program necessary?
  o What is the “wow factor” that your guests will remember?

• Photography/Media/Publicity
  o Photographer for the event?
  o Shot list, locations and time for anything formal or staged for publicity
  o Lighting, or other setup requirements. Walk-thru prior to event.
  o Local media or publicity?

• Registration / Welcome / Staffing
  o Table, linen, branding needed?
  o Nametags? (Consider a label maker and blanks for walk-ups)?
  o Any guest giveaways upon arrival or departure?
  o Promo literature available?
  o How many staff needed for check in, welcome?

• Briefing Packet / Itinerary (2 weeks advance)
  o Who will need a briefing / itinerary (leadership, staff, volunteers, prospect managers, etc)?
  o Who will create / deliver briefings?
  o What notes can you provide on special guests?
  o What are the key roles that staff & leadership should play?

• Additional Event Elements
  o What interactive experiences can you incorporate?
  o What is the 10-15 second “elevator speech” that your guests will leave with?
  o What “wow factors” will make the event memorable?

• Follow – up Post Event
  o Written follow up?
  o Story on social media or in print?
  o Gift for the speakers / hosts / award winners?
  o Letters / email to guests: partnership with Development / Stewardship Officers or VIPs?
  o Remember to get data into TAS if the registration didn’t run through the Customer Service Center (visit this link for instructions!)
  o Post-Event Report: Successes, need to improve, final guest count, budget, etc.