



## **Event Planning Checklist**

- **Strategy**

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

- **Date, time, location of event**

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

- **Size of event**

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

- **Budget and Timeline**

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

- **Guest List**

- What criteria will be used to determine invitation list?
- What other units across campus might be interested in partnering?

- **Invitations / Hold the Date / RSVP**

- What is more appropriate for the event - email or printed?
- If printed, what is the best design concept in terms of shape, size (fold/no-fold, envelope/self-mailer, etc)?
- What visual elements, imagery, logos, or color schemes do you want to use?
- Will a Save The Date be necessary? Best "drop" date?
- Best drop date for the mailed / emailed invitation?
- Will follow up calls / emails be necessary?
- What is RSVP due date?
- Who is the contact for the RSVP?
- Is there a web link / landing page / hashtag that could be included?
- What kind of confirmation will registered guests receive?
- Are there maps / directions that could be included?



- **Catering / Food & Beverage**

- Determine menu concept (light or heavy hors d'oeuvres? Meal served?)
- Any special themes relevant to the program?
- 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?
- What items can the venue provide and what items should the caterer bring including plates, utensils, glasses, trash containers, and appropriate tables?
- Can caterer provide beer and wine? If not, how will that be procured? Is a temporary alcohol permit necessary?
- Have special dietary requests been considered?

- **Physical set-up**

- Where will reception be? Where will program be?
- If outdoor, what is rain plan?
- What style seating is desired for program and/or reception?
- Is a sound system required?
- What branding can be incorporated throughout the space?
- Where will catering be staged and served?
- Is there room for registration table? Where is the best placement?
- Coat check needed? Where is the best placement?
- 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.)?
- Housekeeping or grounds keeping necessary? (Pressure wash? Blow leaves?)

- **Décor & Signage**

- Color scheme? (see [brand.osu.edu/color/](http://brand.osu.edu/color/) for color palette info)
- Is any special signage required for the space?
- Any other needs for décor or special items like balloons, flags, banners, etc?

- **Sound / Music / AV / Entertainment**

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

- **Parking/Directional Signage/Security**

- Is there sufficient parking space on property for self-parking?
- Is valet or shuttles required due to insufficient space or other physical challenges presented by the setting?
- Is there any outdoor signage needed in the area to denote event?
- Is any security needed during the event?
- Have all appropriate permits been filed?



- **Program**
  - Have VIP calendars been held?
  - Are the speakers dynamic? Is there diversity in the line up?
  - Length and style of program – what is appropriate?
  - Is printed program necessary?
  - What is the “wow factor” that your guests will remember?
- **Photography/Media/Publicity**
  - Photographer for the event?
  - Shot list, locations and time for anything formal or staged for publicity
  - Lighting, or other setup requirements. Walk-thru prior to event.
  - Local media or publicity?
- **Registration / Welcome / Staffing**
  - Table, linen, branding needed?
  - Nametags? (Consider a label maker and blanks for walk-ups)?
  - Any guest giveaways upon arrival or departure?
  - Promo literature available?
  - How many staff needed for check in, welcome?
- **Briefing Packet / Itinerary (2 weeks advance)**
  - Who will need a briefing / itinerary (leadership, staff, volunteers, prospect managers, etc)?
  - Who will create / deliver briefings?
  - What notes can you provide on special guests?
  - What are the key roles that staff & leadership should play?
- **Additional Event Elements**
  - What interactive experiences can you incorporate?
  - What is the 10-15 second “elevator speech” that your guests will leave with?
  - What “wow factors” will make the event memorable?
- **Follow – up Post Event**
  - Written follow up?
  - Story on social media or in print?
  - Gift for the speakers / hosts / award winners?
  - Letters / email to guests: partnership with Development / Stewardship Officers or VIPs?
  - Remember to get data into TAS if the registration didn't run through the Customer Service Center (visit [this link](#) for instructions!)
  - Post-Event Report: Successes, need to improve, final guest count, budget, etc.