



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/ 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 Engagement Data Services team (visit this link for instructions!)
 - Post-Event Report: Successes, need to improve, final guest count, budget, etc.