This is a guide for planning a university event to which internal and or external guests will be invited. Events are an imperative component of the university's outreach, developmental, and philanthropic efforts. They must be conducted in a way that represents Winthrop University in a professional and proficient manner. Therefore, if your department or area does not have the resources or funding to deliver a quality event, please consider not hosting the event or hosting a smaller event.

<u>**Overview for Event Planning:**</u>

Start by building a shared vision with your team.

1. **Identify purpose and the desired impact:**
    a. **Brand Awareness**
    b. **Celebration**
    c. **Cultivation**
    d. **Educational**
    e. **Engagement**
    f. **Introduction of New Program, Faculty, so forth**
    g. **Recognition (Award Ceremony, Dedication of Facility, so forth)**
    h. **Reputation Building**
    i. **Revenue Building (Fundraising)**
    j. **Stewardship**
    k. **Tribute**
    l. **Other**
    m. **How does this event fit with the university's strategic purpose**

2. **Identify audience:**
    a. Who is benefiting from the event's purpose
    b. What are the needs of this audience (time of day, type of food and beverages, so forth)
    c. What will the audience respond to positively
    d. Is there more than one audience and if so, identify each along with the above questions
    e. What is the audience benefit of the event

3. **Identify how much can be spent on the event and the allocated funding source(s).**

4. **Identify how success will be measured:**
    a. What does success look like (high attendance, low no show, effective timing, good tasting food, effective service by vendors, smooth registration, no

surprises)

    b. What is of value (engaging Alumni, Students, Campus Community, External Community, Donors, so forth, education of topic, identify prospects or new audience members, positive notice in press, social media)

    c. What is to be measured (audience statistics–what do they represent, demographics, giving totals. interests–what do they think or how were they impacted by the event, giving patterns, contact with the school or student body, other, survey responses, money raised at the event, contacts made at the event, introductions made at the event, information gathered at the event

    d. What are lessons learned and where does improvement need to take place

5. **Follow-up:**

    a. Does the event need post event follow-up

    b. What would assist in meeting the event's purpose

    c. How might this be achieved (Thank you note or letter, Phone call, Coffee meeting, so forth)

    d. Who is the ideal person(s) to accomplish the above

6. **Building the event:**

    a. Identify the problem (event type) and required application (purpose)

    b. Research and analysis (brainstorm possibilities, ideas, with no judgement)

    c. Proposals and preliminaries (of diagrams, specifics, etc)

    d. Synthesis (selecting from the proposals and consider meaningful solutions)

    e. Selection of final solution

    f. Create the event by bringing all the specifics together

    g. Execute the event by bringing the team together and guests

    h. Evaluate the completed event through debrief and assessment of lessons learned, measuring of successful event criteria (evaluating quality, value, meaning, purpose)

Considerations for Events on the Campus of Winthrop University:

1. **Event date:** To maximize the potential guest count, give consideration to other event calendars on campus, in the City, and region.

2. **Event location and venues:** Identify what style of space, how much space is needed. Consider what kind of atmosphere is needed. Give consideration to the size of audience anticipated to avoid having a room either too large or too small for the event. Six square feet per person is

typically allotted for a standing reception. Spaces need to be well-ventilated and air conditioned. Avoid holding events in small rooms, hallways, etc. Check with the university's space request system for availability. Place a space request.

3. **Directions and parking:** Guests need clear driving directions and or maps to the specific location of the event and the most convenient parking. Work with Parking Services in Campus Police to determine an appropriate parking plan for your event and if a parking attendant is necessary. Consider if any special guests have any parking requirements. Parking attendants do come with a fee of $30 per hour with a 2 hour minimum, for a campus group. If this is not an option for the event budget, please recruit volunteers to assist with the parking attendant needs.

4. **Security:** If your event requires security or an officer to be in attendance contact Campus Police to make arrangements.

5. **Invitation:** Identify if the event is formal or informal. Then identify what type of invitation is needed for the event (i.e. printed, electronic, phone call, person-to-person). Decide if a save-the-date is necessary. If a printed invitation is required, contact Printing Services in University Communications and Marketing. Within any type of invitations, include attire or dress code, parking information, what the event purpose is, who the host is, if there are any sponsors, the time the event begins and ends, and if there is a theme. Consider if a response is needed, for food and beverage quantities or seating arrangements. If using an rsvp, it is ideal to list a date for guests to respond by. Collect dietary restrictions if a meal is being served to guests. See the checklist for invitation timeline.

6. **Invitation List** Begin with a list of lists, also known as groups, to be invited to the event (i.e. donors to a specific college, supporters of Athletics, Alumni of a specific decade and or department, and so on). An invitation list can be requested from Advancement Services in University Advancement once the list of lists has been created. Request the final mailing list to be in the proper addressee format to insure the names of the guests are as they prefer. If members of the Board of Trustees need to be invited, contact the Chief of Staff.

7. **Head Count:** On average, 80% of the number of guests invited will attend the event and 20% will decline (i.e. if you have a 100 person guest list, you can expect 80 attendees). This formula is not a given and numbers will fluctuate. As close to the day of the event, generate a guest list for the check-in. Circulate this guests list with appropriate individuals and offices, at least one week prior to the event and the day of the event.

8. **Nametags:** Need to be pre-printed in a suitably large font (36 pt. or larger) to be easily legible. Nametags are ideally placed on the right side lapel of guests to facilitate reading when shaking hands. Avoid peel and stick nametags whenever possible. Staff and employees assisting with the event need to wear nametags. Nametags are best distributed at a registration or check-in table close to the entrance of the event.

9. **Receptions:** The ideal length for a reception is no more than two hours. Generally, pre-program and post-program receptions are best not to exceed one hour.

10. **Banquets, Dinners, Luncheons, Breakfasts:** Consider if the event needs to be a buffet or a served meal. When using a seating chart, seat a university head of table at each table and then place donors, faculty, staff, students, other guests spread equally among the tables. Inform Catering Services of the dietary restrictions.

11. **Program:** If a speaking program is planned during a reception or other event, it is important for invitations to list the time of the program (i.e. if the event is from 7-9 p.m., but the formal program will not start until 7:30 p.m., list both times on the invitation). Consider who is writing the remarks for the speaker and whether it is necessary to have a script for use at the event. Also consider creating an order of events which is the sequence of individual occurrences during the overall event and the concurrent time (i.e. 8pm dinner is served, 8:45pm Master of Ceremony at podium for opening remarks, so on). Consider recognizing any important guests who are in attendance.

12. **Program Length:** If guests are standing, a program is best not to exceed 30 minutes. If guests are seated, a program can last up to two hours.

13. **Schedule of Event:** what to do and when to prepare for the event to take place.

14. **Venue Facilities Set-up:** Provide a diagram with the set-up requirements to Facilities Management for the event layout referencing the space request number. Consider using a program such as Word or Publisher and do not use hand drawn diagrams. Indicate the number of tables, round or rectangle, their locations, how many chairs at each table, and if there are other pieces of furniture or equipment to be placed in the room. If pipe and drape is needed, indicate where. Specify what day and time the set-up needs to be complete and then dismantled. Consider if a coatrack, umbrella stand, or podium is needed. If a coatrack is used, provide your own hangers. Request thorough cleaning of the facility and adjoining bathrooms to take place prior to the event. When placing a set-up request with diagram, reference the Space Request Number and send it in an email to Cindy Reynolds, copy Pam Purser.

15. **Greenhouse:** The greenhouse on campus can provide potted plants for the event free of charge. The pots are plastic and require decorative covers. Place the request to Facilities Management preferably at the time the space request is placed or if after the space request was submitted, note the space request number in an email to Cindy Reynolds, copy Pam Purser. Consider sending the request for set-up, greenhouse, and housekeeping in one correspondence. When ordering greenhouse plants, request the day and time for them to be delivered and retrieved.

16. **Venue Décor:** Assign a theme or style to the event decorations if it is needed. If it is not, simply consider what colors will be used at the event for event supplies such as table cloths, napkins, flowers, favor, and the like. Table linens can be used through Sodexo food service provider and are ordered when placing the food order online. They provide black and or white and a few colored options. If additional décor needs are desired, Sodexo offers a catalogue of options for review and use.

17. **Signage and Branding:** Signage can be used for directional and or decorative purposes. This can also provide branding for the event and the university. Directional signs can be for parking lots and on the interior for room location or for moving guest around a room at food stations. Contact Printing Services in University Communications and Marketing to order.

18. **Lighting:** Room lighting needs to be adjusted or dimmed to encourage a more intimate atmosphere. Consider if every light in the room needs to be fully illuminated. If the program includes speakers or entertainment, consider what type of lighting may be required.

19. **Staging:** If a stage is required, it should be proportionate to the room and appropriate for the need. In small gatherings, a podium may be sufficient.

20. **Audio and Visual:** Depending upon the program to be delivered and the size of the room, audio amplification may or may not be needed. Test audio equipment on the day prior to the event and the day of the event. A technician may need to be on hand if the event is of a high caliber or large (more than 50 attendees).

21. **Bar Service:** A sufficient number of bar stations and bartenders are needed to reduce waiting times. Distribute bar locations to encourage distribution of guests to multiple stations. Do not place a bar station near the entrance to the event to avoid having a crowd form at that location. Consider pre-pouring wine in glasses that guests can pick up without standing in line. A good formula for estimating alcohol consumption is one drink per hour per person—2 hour reception x 100 people = 200 drinks. This is not an absolute formula and can change depending on the time of day, type of event, and type of audience. It is always best to

purchase more than you need and return the leftovers after the event.

22. **Food Service:** Food and beverage menus are available online at Catertrax. Place the order online no later than two weeks prior to the event date. No later than 5 days prior to the event date, confirm the guest count with catering services either online in Catertrax or by email. Buffet lines need to, whenever possible, be "two-sided" to let guests obtain their food without waiting in long lines. A sufficient number of buffet stations needs to be considered to distribute guests to different places in the venue. Menus cards are helpful to indicate the food choices to guests. Menu cards can also be ordered through Sodexo in the online order. Place cards are helpful when seating is assigned. Consider putting the menu and the guest's name on the place card at each place setting. Assign a team member to invite guests to attend the buffet lines in a structured order so that they do not crowd the lines.

23. **Reception Food Choices:** Bite-sized hors d'oeuvres are often a good choice, whether passed and or available at a food station. Food options that appeal to a variety of people are also strongly recommended, i.e. meat, poultry, seafood, vegetarian, and sweet options.

24. **Banquet, Dinner, Luncheon, and Breakfast Food Choices:** Whether buffet or served, always consider providing two protein options (i.e. one fish or seafood and one poultry or red meat). Also consider the vegetarian guests and provide suitable options.

25. **Silverware and Glassware:** Wherever possible, avoid plastic utensils, glasses, and flatware. Glass and china are always the preferred choices, though when deciding consider what the budget allows.

26. **Photography:** Some events may call for a photographer to memorialize special awards and recognition of special guests for follow-up purposes or to document the event. Creating a photography list ahead of time will ensure that the proper photos are taken. (i.e. a photo of a faculty retiree with family or the recognition of a major donor by the dean of the college). Posed photos work best for commemorating these types of events. Consider sharing particularly good photos with donors or special guests after the event. A hand-written note to accompany the photo(s) is a nice touch. The photographs can also be used in post event press releases to make announcements and on social media platforms for publicity and promotion.

27. **Tickets:** Tickets are often sold for events that have a revenue building element to them. If tickets are used for the event, consider the appropriate price to cover expenses and to generate revenue. Contact Winthrop Foundation to learn more about this option. Guests of honor, honorees, and attendees of a specific stature may require complimentary tickets.

Consider how many will be granted and collect the names of these guests.

28. **Event Staffing:** Consider preparing a staff plan for the event. Areas to place staff include, but is not limited to registration or check-in, greeters at doors, assisting guests with special needs, coat and purse check, facilitators for conversation and introductions, handlers for guests or honorees, escorts for guests or honorees. Consider personality and purpose when assigning roles.

29. **Promotion with Publicity Plan and Collateral:** For the event promotion and publicity for the event, contact University Communications and Marketing to inquiry about a plan of action. Consider working with them to design and print posters, flyers, tent cards to distribute on campus to increase the attendance. UCM, if needed, can write a press release to announce the event if the purpose is advocating a cause or promoting an aspect of the university. At the event, collateral can be displayed to assist with university promotion and community engagement purposes.

30. **Entertainment and Music:** Consider if music or entertainment would be enjoyable or useful to the event's purpose. Depending on the venue type, if it would add to the atmosphere, university professors and students in the Department of Music can be contracted to perform. Contact the Department Chair of Music to learn more about options. Various local bands are available also.

Resource Links can be found on the Winthrop University, University Events website.

Event Checklist and Timeline

Activity	Person Responsible	Due Date
Four to five months before the event		
Choose and set the date making sure it agrees with key attendees' calendars. Avoid religious and other holidays. After checking the University Events Calendar and Academic Calendar, avoid these dates. Check community calendars.		
Initiate event planning and establish responsibilities		
Reserve date on key attendees' calendars		
Determine and reserve venue on Space Request System		
Determine funding and budget sources		
Contact The President's Office if you would like the President or First		

Lady to participate		
Three to four months before the event		
Initiate program discussion		
Determine guest list and create database		
Design save-the-date (cards or email)		
Determine need for give away		
Contact Communications and Marketing to Create invitations / RSVP cards, if needed; Obtain approvals for final design		
Reserve parking lots on the Reservation Request System, request attendant if needed (paid off-duty officer) or recruit volunteers from one's department, time for cones to be removed prior to event start time, include reserved space for important guests and honorees		
Block hotel rooms for out-of-town guests & contact the Inn at Winthrop for availability		
Two to three months before the event		
Confirm speakers and find out about presentation needs		
Develop draft of program, include order of event, and schedule of events		
Determine precise area at venue for stage and seating		
Determine event signage requirements (pedestrian & vehicle)		
Determine onsite check-in, registration procedures including greeters, escorts		
Book event with Sodexo & establish preliminary menu and budget		
Establish plan for important guests and honorees seating at event		
Contact Campus Police for safety and security review		
Contact a company for bus and car transportation, if needed		
Contact outside vendors as required for:		
Tent, stage, podium, chairs, tables		
Electronics - sound system, lighting, LCD projector, DVD, laptop		
Flowers, plants, balloons, other decorations		
Give away(s)		
Mail save-the-date (6 weeks to 8 weeks before event)		
Begin design of give away(s), if needed		

Six weeks before the event		
If alcohol is being served, request necessary campus approvals and complete alcohol forms.		
Place order for invitations and RSVP, if needed, 4 to 6 weeks prior to the event. Identify the rsvp date, 1 to 2 weeks prior to event depending on event type and needs.		
Send invitations		
Order give away(s), if needed		
Four weeks before the event		
Approve final program, order of event, and schedule of events		
Draft script or talking points for speakers		
Work with Communications and Marketing on copy for internal and external press releases		
Meet with vendors on site		
Consider site preparation (special cleaning, equipment, and trash removal). Place work request with Facilities Management, reference Space Request number		
Place Set-up request with room diagram and specifics with Facilities Management, reference Space Request number		
Prepare event signage, order with Printing Services		
Two weeks before the event		
Review planning group and staffing assignments for day of event		
Meet on site with operational staff such as transportation officials, AV, Building Managers if needed, check-in, greeters, escorts to discuss responsibilities		
Meet with Sodexo on site to discuss setup and final menu		
One week before the event		
Send Spdexo final count (catering deadlines may vary) no later than 5 business days prior to event		
Print programs, name badges, and seating cards		
Confirm arrangements with vendors		

24 hours before the event		
Contact caterer to verify all arrangements, details		
Confirm security requirements		
Ensure tent, chairs, tables, stage, podium are in place		
Day of the event		
Check location setup to include chairs, tables, podium, food		
Arrange printed material, nametags, give aways, etc. on registration table		
Check sound and lighting equipment with vendor(s)		
Ensure space and hook-ups are available for media		
Ensure decorations are in place		
Place water at podium		
One to five days after the event		
Write thank you notes and send photos to important guests. Also send thank you notes to speakers, volunteers, staff, and others as appropriate		
Complete written evaluation of the event with suggestions for future events on lessons learned		
Coordinate event story and photographs with Marketing and Communications		

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