**Hosting an Event Checklist**

* **Strategy**
  + What is this event trying to accomplish?
  + Who is the target group?
  + If a Clarkson event, how does it fit into the Clarkson Values?
  + Is this event annual or just a one-time event?
  + Has this event happened in the past?
* **Date, time, location of event**
  + What is the date of the event? Suggested Location?
  + What time 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 Clarkson goals
  + Physical capacity of space, amount of available seating, comfort of the guests
  + Budgetary limitations
* **Budget and Timeline**
  + Who will cover what portion of costs? Who approves?
  + Who will perform which logistical arrangements (i.e. catering, rentals, vendors, etc?)
  + What deadlines must be established to ensure that event plans continue smoothly? How will anticipated travel and other conflicts impact those deadlines?
* **Contract and deposits**
  + Make sure contract is executed and deposits are paid
  + If a non-Clarkson group, secure proper event insurance from <https://tulip.ajgrms.com/> or from your local homeowner/auto insurance agent
* **Guest List**
  + What criteria will be used to determine invitation list?
  + Who pulls data from PeopleSoft (if applicable)?
  + Is this an open event or invited guests only?
  + If it is a private donor/alumni event (what is the involvement of faculty, Alumni or Donor relations)
  + Is it an all-call, or a private donor event (involvement of Alumni group, or more strategic)
  + Are elected officials or persons running for elected office been invited and has External Relations been notified to follow up on protocols and compliance requirements?
* **Invitations / Hold the Date / RSVP**
  + Is there a written invitation or are they invited by email/another form
  + Who is designing the invitation or email?
  + Timeline for the invitations/reminders/save the date?
  + Will the RSVPs dictate any of the other decisions?
  + Who is the contact for the RSVP (how are they collected?)
  + Is there a web link / landing page
  + Are directions included?
* **Catering / Food & Beverage**
  + Determine menu concept (light or heavy hors d’oeuvres? Meal served?)
  + Any special themes relevant to the program?
  + Aramark will work with you on the menu choices and timing of the event
  + Make sure client is aware that Aramark is our preferred caterer
  + Does anyone have food allergies?
* **Physical set-up**
  + Where will reception be? Where will program be?
  + Indoor or outdoor? Or both?
  + If outdoor, is there a rain plan?
  + Is there enough seating for program and/or dinner?
  + Work with the events set up department to make sure room is set up correctly
  + Will all guests be able to hear in this set-up or is a small sound system required?
  + Podium and AV
  + Clarkson branded event?
  + Where will catering be staged and served?
  + Is there room for check-in table near entrance?
  + Coat racks needed? Where will they be located?
  + Are there any physical challenges presented by the space or the layout
  + Facilities or grounds keeping need to assist with set up?
  + Will there be any handicapped guests or guests who need special help?
* **Décor & Signage**
  + Will linens be required? Color & size? Work with Aramark
  + Is any special signage required for the space?
  + Any other needs for décor or special items like lights, flags, banners, etc.
* **Sound / Music / AV**
  + Is there background music? Who brings? Live music? Trio, piano, etc.
  + Any presentation? Sound imbedded?
  + Using screen and projector?
  + Microphones (type and number)
  + Bringing a laptop or renting one? What type
  + Technician needed onsite for event?
* **Parking/Directional Signage/Security**
  + Is there sufficient parking space on property or around event for self-parking?
  + Is there any outdoor directional signage needed?
    - If so, outdoor sign usage must be requested in advance and 13” tall by 22” wide, laminated signs must be created
  + Inside signs? (free of charge)
  + Is any security needed during the event?
* **Program**
  + Host or President’s role: welcome, introductions, wrap-up
  + Will there be a guest speaker?
  + Length and style of program
  + Is there a printed “Program” or “Menu”? What is the program about?
* **Photography/Media/Publicity**
  + Photographer for the event? Campus or Hired
  + 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?
  + Who has guest list?
  + Nametags? Blanks for onsite?
  + Any guest giveaways with arrival packet?
  + Clarkson promo pieces available? Who brings?
  + How many staff will there be for check in, welcome?
* **Briefing Packet / Itinerary (2 weeks advance)**
  + Who does briefing packet? Itinerary?
  + Notes on donors, strategic guests
  + Evening program outline, introductions necessary
* **Follow – up Post Event**
  + Thank you’s
  + Report: Successes, areas for improvement, final guest count, budget, etc.
  + Surveying guests on their experience