The Fundamental Steps to Planning a University Event
STATE YOUR PURPOSE

• Clearly define **WHY** you are doing the event

• Goals and objectives – what you hope to attain or accomplish through the event.

• Fundraising, networking, recognition, to enhance community or government relations, to increase exposure of your school or research center or the university as whole, to provide an opportunity for alumni to re-connect etc.

• Create a “mission statement “ for your event
  
  Example: (CEO Breakfast Series)
  
  “Establish and maintain Northeastern’s visibility and engagement with the Boston business community by presenting locally and nationally prominent CEO speakers.”

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Define your target audience

- **Who and why**
- **Demographics**
- **Geographical**
- **Degree/major/school**
- **Affinity (similar interests)**
- **Giving history and/or potential**
When...

- Avoid religious holidays
- Convenient days of the week & time of day for the audience
- Check the academic calendar
- Think seasonally
- When possible, have a few date options to choose from.
- Event fatigue – awareness of similar events occurring within the same timeframe, or vicinity.
AND WHERE?

• Location, location, location!
• Availability
• Appropriate room size
• Convenience for guests
• What else is going on in the venue at the same time?
• If outside, have a rain plan
University Event Policies

• External Groups: contract, rent, service charges, insurance

• University Host/Sponsor

• Equal Opportunity

• Contracts/Licenses/Permits with venues & suppliers

• Public Safety

• Many others in Planning Guide...
$ B U D G E T ~ $

- Determine how much you have to spend

- *Essential to accurately plan necessary components for a successful event*

- Track all expenses and income

- *Retain all invoices and make sure budget coordinator gets copies*
Disability Resources

- NU is committed to ensure that all events held on or off campus are accessible to guests who are disabled.

- Event examples- HP parking, food areas, buffets, bars & seating wheelchair accessible, ASL Interpreter; visual accessibility, presentations in alternative formats, invitations should contain access symbols.

Promoting your event

• Without people, there is no event!!

• BRAND the event – name, term, sign, symbol or design

• Publicize NU - use logos, banners, signs
  (Contact NU MarCom for help with NU identity)

• Print correspondence
  - Save the date – 6 months prior, usually a postcard or flyers
  - Formal Invitation – 1 ½ months prior to RSVP date

• Electronic correspondence – e-mail, web site, social networks, etc.

• Personal correspondence – good ol’ telephone and word-of-mouth
**Programming**

- Timing is everything!
- Create an Event Timeline – what happens and when
  - Start and end times are important but what else comes in between?
  - Get the message across in the time allocated
- Plan for guest arrival times, introductions, speaking remarks, presentations, food service, Q&A, conclusions, departures, and entertainment

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You are invited...

- Invitation sets the tone of the event
- Who, What, Why, When, Where
- How - directions, attire, parking arrangements,
- RSVP – include response date and contact information (e-mail, telephone, web site)
- Keep it simple – people have short attention spans!
- Design is key – get the audiences’ attention from the get-go
- When possible, hand write envelopes

Northeastern University
College of Engineering

You are cordially invited to celebrate the holiday season with fellow engineering alumni and friends at a reception and dinner in recognition of your generous support of the College during the 2007-08 fiscal year.

Hosted by David E. Luzzi, Dean

Thursday, December 11, 2008
Cocktails at 6:00 PM
Dinner at 7:00 PM

Raytheon Amphitheater, Egan Research Center
120 Forsyth Street

Reply card enclosed
RSVP by Wednesday, December 3

Cocktail/Festive Attire
Parking validation provided for Renaissance Garage.

For questions or special accommodations, contact Leila Gebeli, Advancement Events
617.373.2521 or l.geebeli@neu.edu
Guest Management

• Take great care of your guests from start to finish.

• The guest list is vital to the success of the event
  Use Microsoft Excel – include all the pertinent information. Watch typos!

• Create a variety of items from this list- address labels, nametags, place cards, tent cards, thank you letters, and more.

• Keep in communication with your guests.
  Reiterate all the details. People sometimes forget!!!

• Use assigned seating to help achieve your goals.
Room Set-up

• Do a walk-through of the space, even if you’ve seen it 100 times before. Be sure you have ample space to conduct the event.

• Spectrum of room layouts- banquet, cocktail, theater, classroom, boardroom, hollow square, U-shaped.

• Also consider space for food stations, literature, bars, presentation needs, registration, coat check and more

• Make sure that guests will have clear sight lines to the focal point of the room

• Bring the caterer with you to the walk-through so they are familiar with the layout and set-up.
Types of Room Set-Ups

Banquet Style
Six- or eight-foot conference tables placed end to end in the room to form the shape of a U. Chairs are placed around the outside of the U. Used for formal functions, standing round tables of either 36 or 72 inches in diameter are used to seat 8 to 14 people.

Classroom Style
Rows of tables with 2 or 3 chairs at each one, with tables arranged to face the front of the room. Most desirable for long lectures.

Conference Style
Six-foot or eight-foot conference tables clustered in the center of the room to form one solid surface. Chairs are placed around the perimeter of the tables.

U-Shape Style
Six- or eight-foot conference tables placed end to end in the room to form the shape of a U. Chairs are placed around the outside of the U.

Auditorium / Theater Style
Rows of chairs facing the front of the room, usually divided by center and/or side aisles. Appropriate for short lecture or larger groups that do not require extensive note-taking.

Hollow Square Style
Six- or eight-foot conference tables placed in a rectangular outline with open space in the middle. Chairs are placed around the perimeter of the square. Appropriate for groups fewer than 40 where there is a group leader or panel seated at the head of the set up.
Food & Beverage

- Factors to consider when planning for food and beverage
  - Time of day
  - Duration of event
  - Audience
  - Budget

- Choose a food and beverage provider who offers the best overall value for your refreshments and/or meals
  - Dietary restrictions
Rentals

- Everything and anything can be rented – building facades, aircraft hangars, water fountains and the New York Public Library.

- Basic rentals - china, glassware, tables, chairs, linens, plants, rugs, pipe and drape, staging and props

- Often, rentals can be obtained through the caterer, usually at a mark-up
Décor

• Simple but effective ideas – specialty linens, florals, candles, seasonal items, lighting.

• Décor should be appropriate for the audience, type of event and fit your budget.

• Continue branding the event with décor-color scheme, theme and the messaging.

• Match printed materials (menu cards, program, place cards, etc.) to overall look of the event.

• Be creative!
Audio/Visual & Lighting

- AV is key to the success of the event and delivering the message – it can make or break the event

- Basic A/V equipment – podium and microphones (lavaliere, handheld, tabletop), projectors, laptop, screens, risers (staging), pipe and drape, lighting, sound

  - If you aren’t tech-savvy, hire someone who is – it is worth every penny.

- Contact speakers several times before the event to confirm the equipment needed.

  - Always have your presentations backed up on a memory stick and the laptop.
Parking Arrangements

- Parking locations should be convenient to the event location.
- Handicap accessible – ramps, elevators, etc.
- Provide guests with directions to parking location and from parking to venue. Use signs or staff to assist if necessary.
- Let guests know the costs to park, or if it will be complimentary.
- Always take time to communicate the parking plan to the staff of the garage to avoid confusion and misunderstandings.
- High-level events may require valet service.
Photography

- Photographs document who was at the event, what it looked like and more
- Photographers need to be directed as to which people or scenes they need to capture, so assign a staff person to them.
- Photographs can be used in future marketing materials (brochures, Web sites, invitations, newsletters, NU Magazine, etc.)
- Send photos to guests post-event
- Decide if you really have a use for the photos – photographers can be expensive
- Make sure you own the rights to the photographs!
Finalize the details— all of them!

3 to 5 days prior:

• Create a final timeline and send to all key players incl. caterers, speakers, staff members.

• Contact list should include cell phone numbers for all vendors, staff and presenters. Distribute this with final timeline.

• Rehearse speaking program and presentations – timing is everything. Even food service should be timed out.

• Create a briefing memo for senior staff
THE COUNTDOWN CONTINUES...

2 to 3 days prior:

• Call and e-mail all guests to confirm their attendance and answer questions they may have.

• Confirm final details with all vendors- reiterate final guest count to avoid unnecessary charges or last-minute scrambling for extra supplies

• Finalize seating and create printed materials like nametags, tent cards, place cards, menu cards, etc.
Day of the Event

- You are the DIRECTOR – point person and logistics expert
  - Arrive at least 1 ½ hours before the event begins and be prepared to stay until the bitter end.
  - Meet briefly with caterer, registration staff, speakers, and volunteers so everyone is comfortable with their roles. Update them on any last minute changes.
  - At the start of event, greet guests with a smile and be helpful. At the end of the event, thank them for attending.
  - Leave your cell phone number on your office voicemail – people may lose or forget the information you sent them and need to get in touch with you.

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Post Event

• Surveys: get feedback from the attendees
  - On-line or paper evaluation
  - Gives insight on the success of the event and how to improve for the future.
  - Provides ideas for subsequent topics

• Maintain relationships with attendees – no more than 1 week after, send a thank-you note. Leaves a lasting memory and encourages future participation.

• Reconcile invoices – check and double check. Only pay for goods and services you ordered and received.

• Track payments to vendors ensuring they are paid in a timely manner
  - Avoid late charges
  - Maintains good relationships with vendors
If you have any questions, or need help planning your next event, contact us at Events@neu.edu or 617.373.7453