**In-Person & Virtual Event Planning Resource Guide**

The following is a guide to provide resources and help in the planning process.

Although the events team within Advancement and the [Marketing and Communications](https://osuehe.teamdynamix.com/TDClient/1867/Portal/Requests/ServiceCatalog?CategoryID=13002) (MarCom) teams are available for consultation, their services are available for events sponsored by the Dean’s Office, Advancement and other large-scale college-wide events. All other events are to be planned and executed by the departments/offices.

**General Event Questions**

Start by asking the following questions:

* What is the goal of holding the event?
* Who is your audience?
* How will it support the mission and the five pillars of the college?
* How will the college benefit from the event?
* How will you measure success?
* Do you have approval of your department chair and the Dean’s Office?
* Will you need the Dean or Department Chair to attend event?
* What is your budget?
* Who will be involved in the planning/execution of the event?
* Will the event be held live, virtually or hybrid?

Once you know those answers, the resources provided below can help in planning.

**BUDGET**

The fiscal officer in your department can help you create a budget. Costs to keep in mind include:

* Venue rental – include a/v equipment rental
* Catering – include catering fee, service charge, linens, equipment rental, floral arrangements, etc.
* Transportation/Parking
* Giveaways \*Please keep in mind that giveaways to faculty/staff may have tax implications\*
* Professional photography
* Speaker fees and honoraria
* Any events outside of your main event (dinner with speakers and special guests, etc.)
* Printing of invitations, agendas, signs, etc.
* Supplies such as name tags, table tent cards, etc.
* Live streaming and/or multi-media production needs
* Budget template (link to excel spreadsheet) to track costs.
	+ Please note:
1. Any staff/faculty gifts or giveaways have tax implications for employees
2. There are limits on budgets for social events
3. Contact Brandon Foster in the fiscal office with questions
* Event planning timeline checklist (link to pdf) to keep on track.
* Event summary template (link to excel spreadsheet) to summarize the event in one document for easy reference.

**DATES**

* Please see the EHE and Ohio State calendars to confirm your event will not conflict with any others. Also contact the Dean’s Office regarding other events that may not be on the calendars.
	+ [Ehe.osu.edu/events](https://ehe.osu.edu/events/)
	+ [Osu.edu/events](https://www.osu.edu/events/)

**AUDIENCE**

* If you wish to include alumni and/or donors, please contact the EHE Office of Advancement for guidance/ assistance.

**In-Person Event Resources**

**VENUES**

* Campus venues
	+ [planevents.osu.edu](https://planevents.osu.edu) provides you with:
		- [University and affiliate venues](https://planevents.osu.edu/venues-and-services/longaberger-alumni-house)
		- [List of hotels near main campus](http://www.uhdcolumbus.com/)
		- [Campus map with parking suggestions](https://www.osu.edu/map/)
		- [A link to space requests for university owned rooms](https://planevents.osu.edu/request-information)

The following are also popular event spaces on campus. Room rental fees are associated with each.

|  |  |
| --- | --- |
| **On-campus venues** | **Seating Capacities** |
| **Theatre** | **Banquet**  | **Classroom** |
| [Drake Performance & Event Center](https://drake.osu.edu/page/conferences-and-events) | 600 | 300 | 100 |
| [Fawcett Center](https://www.fawcettcenter.com/page/home/) | 496 | 310 | 100 |
| [The Blackwell Inn](https://www.theblackwell.com/meeting-space-at-osu.htm) | 110 | 300 | 32 |
| [The Faculty Club](http://www.ohio-statefacultyclub.com/) | 225 | 200 | 100 |
| [Ohio Union](https://ohiounion.osu.edu/) | 1,700 | 980 | 780 |
| [Thompson Library](https://library.osu.edu/roomrental) | 50 | - | 87 |
| [Nationwide & Ohio Farm Bureau 4-H Center](https://ohio4h.org/4-h-center-0/creating-event-0) | 400 | 275 | 60 |
| [Longaberger Alumni House](https://planevents.osu.edu/venues-and-services/longaberger-alumni-house) | 200 | 152 | 110 |
| [Pomerene Hall](https://tdai.osu.edu/pomerene-hall/space-rentals) | - | 130 | 90 |
| [Ohio Stadium](https://ohiostatebuckeyes.com/rental-information/) | 250 | 240 | 100 |
| [Wexner Center for the Arts](https://wexarts.org/facilities-and-rentals) | 2,477 | 250 | - |
| [Covelli Center](https://planevents.osu.edu/venues-and-services/covelli-center) | - | 400 | - |
| [Jack Nicklaus Museum](https://www.nicklausmuseum.org/#events) | 100 | 90 | 50 |
| [Schottenstein Center](https://www.schottensteincenter.com/arena-info/booking) | 80 | 896 | 40 |

* + Smaller rooms for meetings or gatherings are available around campus, many without a fee. Check with a building’s facility coordinator for details.
	+ EHE has various event spaces in its campus buildings that are free as well. Please contact individual [building facility coordinators](https://s2f.osu.edu/bc/) for details.
* Columbus area venues
	+ The Greater Columbus Convention and Visitors Bureau has a list of venues at <https://www.experiencecolumbus.com/meeting-planners/>
	+ Additionally, many local restaurants have banquet rooms or private event spaces. Typically, these rooms have rental fees and/or catering minimums.

**HOTELS**

* [Uhdcolumbus.com](http://www.uhdcolumbus.com/) provides a list of hotels close to main campus. Some offer an Ohio State discount and free transportation depending on the time of year.

**REGISTRATION**

There are a variety of ways to manage registrations or RSVPs

* [Qualtrics](file:///C%3A%5CUsers%5Cwhite.3127%5CDocuments%5CEvent%20Planning%5Cosu.qualtrics.com) – Through this online tool, you can create and customize surveys and pull a variety of registrant reports. This option is best if there is no fee associated with attending the event.
* NelNet is a registration system that you can use in conjunction with Qualtrics to include a payment option for guests. Contact Matthew Moore for NelNet questions and assistance.

**GIVEAWAYS/PROMOTIONAL ITEMS**

There are a number of [Ohio State approved vendors](https://busfin.osu.edu/buy-schedule-travel/purchasing/find-supplier). For giveaways, the college typically uses Proforma. Price can vary depending on quantities purchased. Please see [proformaosu.com](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cproformaosu.edu) for an online catalog and contact Penny Sens (.17), Office of Advancement, for ordering information or availability of items available in the College’s existing stock.

*\*Promotional items/giveaways will be charged to your department’s budget.*

**MARKETING/COMMUNICATIONS**

Marketing and Communications (MarCom) can assist with:

* Content Writing and Editing
* Website
* Graphic Design
* Publication
* Social Media
* Marketing and dissemination

Submit a ticket to [MarCom](https://osuehe.teamdynamix.com/TDClient/1867/Portal/Requests/ServiceCatalog?CategoryID=13002) for consultation on how to successfully market your event to your target audiences.

**PRINT MATERIALS**

* [Uniprint](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cuniprint.osu.edu) can print invitations, agendas, programs, and signage. A Requisition must be first submitted through Workday and approved prior to ordering.
* If you’d like to print yourself, [Avery](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cavery.com%5Ctemplates) has a wide variety of nametag, label and other templates.
	+ Contact [MARCOM](https://portal.ehe.osu.edu/service/marketing) for a Strategy Consultation for brand support in printing projects

**EVENT MATERIALS**

The college has many items available for use at EHE events. This includes, but is not limited to:

* Photo back drop – white with EHE logos
* EHE 7’ sign – pull up, black background
* Black tablecloths, (12) round, (40) rectangular and (46) college color sash

\*Charge will be accessed to your department budget for dry-cleaning\*

* OSU cheer items such as pompoms and megaphones
* 22 Silver balloon weights
* EHE logo tablecloths
* Serving bowls and platters
* 36 Cylinder vase centerpieces
* 16 Mercury glass finished vase centerpieces
* 10 Red vase centerpieces with scarlet and gray decorative grasses and buckeyes
* 8 Easels

Please contact Penny Sens (.17), Office of Advancement, to reserve any of the above items or for a list of items available.

**TEAM BUILDING AND ICE BREAKERS**

The OSU Leadership Center provides practical training programs and workshops for faculty and staff. In addition, there are a number of resource links on its web site at [leadershipcenter.osu.edu](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cleadershipcenter.osu.edu).

**PHOTOGRAPHY**

The university has an [approved vendor list](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cbusfin.osu.edu%5Cbuy-schedule-travel%5Cpurchasing) of professional photographers for hire.

Stock footage from the university can be found at [brand.osu.edu/photography](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cbrand.osu.edu%5Cphotography). There are guidelines on how the photos should be used.

MarCom can take photos for social media purposes. It also has stock footage of EHE related places and events. Please contact the communications department for details.

**HELPFUL HINTS**

* It is important to ask guests if they require special accommodations. Disability parking, seating, dietary restrictions, etc. should be taken into consideration. Including a statement such as the one below in your registration is helpful.
* *If you have questions about accessibility or wish to request accommodations, contact* [*Disability Services*](https://slds.osu.edu/)*. Typically, a notice of two weeks will allow enough time to provide seamless access.*
* [Ouab.osu.edu](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Couab.osu.edu) – if your target audience includes students, consider collaborating with the Ohio Union Activities Board to promote the event.
* You can create shorter web links and name them yourself by converting a longer web site name at [go.osu.edu](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cgo.osu.edu).
	+ The shortened url can be trusted and is permanent
	+ Create random or customized urls: "[go.osu.edu/123](https://go.osu.edu/123)" or "[go.osu.edu/alumni](https://go.osu.edu/alumni)"
	+ URL Tracking, Statistics and Management tools
* Zero Waste – Help in planning a zero waste event can be found at [Facilities Operations and Development](https://fod.osu.edu/zero-waste)

**Virtual Events**

Virtual events can provide an opportunity for you to reach a larger audience, whether it’s a smaller interactive event, a large-scale webinar or pre-recorded event.

**AT LEAST THREE WEEKS PRIOR**

* Choose a date and time
	+ Check [OSU master calendar](https://www.osu.edu/events/) and [EHE’s calendar](https://ehe.osu.edu/events/) to confirm there will be no conflicting events
	+ Once a date is decided, submit to both the Dean’s Office as well as Ohio State’s calendar via [go.osu.edu/calendar](http://www.go.osu.edu/calendar)
	+ Things to consider: your speakers’ availability; when your audience would most likely tune in; whether you’ll offer the recording of your event at a later time
* Identify what audience you’re trying to reach
* Choose a platform to offer your event, starting with whether a pre-recorded or live streamed event would best serve your needs



* Resources for live streaming events:
	+ [which platform will best fit your needs](https://it.osu.edu/news/2020/05/04/should-i-use-zoom-skype-business-or-teams) (Zoom tends to be the preferred vendor on campus right now)
	+ [best practices](https://blog.zoom.us/best-practices-for-hosting-a-digital-event/)
	+ [how to host a successful event](https://blog.zoom.us/wordpress/2020/03/04/best-practices-for-hosting-a-digital-event/)
* Contact [MarCom](https://osuehe.teamdynamix.com/TDClient/1867/Portal/Requests/ServiceCatalog?CategoryID=13002) for consultation on how to successfully market your event to your target audiences and assistance with:
	+ Invitations
	+ Marketing
	+ Social media
	+ Tech consultation/platform suggestions
* Identify support staff – A minimum of two support members are needed for behind-the-scenes technical details
* Identify speakers/panelists
	+ Select speaker/s and or panelists for the event
	+ Share best practices guidelines with them
	+ Discuss whether the event will be recorded and shared after the event
	+ Register them for the event
* Meeting/Webinar set up
	+ Decide if there is a need for PowerPoint slides, videos, or audio
	+ Enable a waiting room
	+ Assign roles for live webinar/meeting as needed:
		- Starting “broadcast”
		- Granting attendee access to the meeting
		- Starting/ending recording (save to the cloud)
		- Monitoring chat and moving questions to Q&A (must participate as an “attendee”)
		- Monitoring Q&A (moderator or communications partner)
		- Moderating discussion
		- Muting/unmuting attendees
		- Sharing slides/screen
		- Sharing audio (must be a separate individual from the person sharing slides)
		- Assisting attendees with issues
		- Administering polls
	+ Add feedback survey link and/or end web link
	+ Decide if you’re recording and, if so, decide where the recording will live after the event
* Create an event technical briefing (see template)
* Set up closed captioning
	+ Request availability/quote from an approved vendor. EHE typically uses PRI
	+ Submit to Workday
	+ Once approved, confirm with vendor and register the closed captioner for the event
	+ Update the person in webinar settings from attendee to panelist
	+ Send link, slides, and other details to captioner the day prior to the event
* Send out Outlook invite to speakers/panelists, support staff, closed captioner and include:
	+ Timeline – sign on time, actual time
	+ Personal links unique to them - BEFORE you do this, go into settings and change speakers from attendees to panelists so they can enter early
	+ Reminder for them NOT to register themselves
	+ Any support documents
	+ Copy their assistants on all communications
* Set up a rehearsal time to review logistics
* Decide if a feedback survey is necessary and embed a link if the platform allows

**WEEK PRIOR**

* Send submitted questions to speaker if applicable
* Receive PowerPoint slide show from speakers; review to ensure there are no technical issues
* Need a zoom license for more than 500 guests? Contact mailto:ehe-events@osu.edu
* Hold rehearsal with speakers/panelists to review technical briefings, logistics, timeline and slides

**DAY OF EVENT**

* Using two screens is suggested for the host. This allows them to be able to share a slide on one while managing the webinar functions on the other.
* At least 30 minutes prior to event start time:
	+ Shut down your Outlook, Teams, etc. to avoid interruptions
	+ Prep waiting room music if applicable
	+ Set up PowerPoint
	+ Host promotes staff/panelists to co-host in the webinar as needed
	+ Note – do not assign co-hosts/alternate hosts during the event set up in CarmenZoom
	+ Host enables screen sharing for panelists/attendees (if applicable)
	+ Host mutes all attendees (if applicable)
	+ Host hides all “non-video” panelists (if applicable)
	+ Host screen shares / audio shares as needed

**POST EVENT**

* Host downloads:
	+ Video
	+ Chat
	+ Transcript
	+ Q&A report
	+ NPS summary report (found in Qualtrics survey – it’s a number 1-100)
	+ Attendee report
* Send follow up feedback survey to guests if one wasn’t embedded in the virtual event.
* Post digital content to pre-determined locations
	+ YouTube EHE channel – send to MarCom
	+ OneDrive – to those involved in the event
* Closed captioning vendor will send
	+ Transcript from event
	+ Invoice
* Share attendee report with the Office of Advancement so the college can track alumni participation in events.

**Hybrid Events**

For a hybrid event to be successful, you must think about the in-person audience and virtual audience separately. Each audience will have different needs that need identified.

Some venues have built-in streaming capabilities, while others do not. If your venue does not, you will need to choose an [approved vendor](https://busfin.osu.edu/user/login?destination=node/37) to provide this service. You’ll also need to decide whether they are merely live streaming the live event or providing something more than that (a transition between speakers, graphics, captioning, etc.).

Best Practices:

* Confirm you have:
	+ High-speed internet access
	+ An a/v team to assist throughout the event.
	+ High quality lighting and audio
	+ Proper branding seen by both audiences
	+ Closed captioning (see Virtual Events section above for details)
* Consider pre-recording portions of your event. Then these can be played back during the event to both audiences.
* Think through your transitions and what the virtual audience will see between speakers or segments. Many times a graphic can be used for transitions.
* If time allows, provide a practice run prior to the event with all speakers. A good understanding of timing and logistics is crucial so the cameras know where to focus.
* Have a back up plan if the virtual audience experiences technical difficulties.
* Find ways for your virtual audience to participate in the event. This can be through social media, hashtag, chat messages or polls.
* Consider recording your event so the content can be used in the future.