**IN-PERSON EVENT PLANNING TIMELINE**

 **6-12 MONTHS**

* Confirm event goals (raise funds, celebration, educational, etc.)
* Decide whether an in-person, hybrid or virtual event platform will work best to achieve your goals and reach your audience
* Determine how you will measure the success of your event and create an evaluation plan
* Decide on a date taking other [EHE](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5CEHE.OSU.EDU%5CEVENTS) and [Ohio State](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5COSU.EDU%5CEVENTS) events into consideration
* Discuss budget with the Fiscal Office for your unit
* Submit event information with estimated budget to the Dean’s Office for approval (if applicable)
* Choose theme (if applicable)
* Consider available venues and which ones will help you to meet your goals; submit contract through Workday to be signed by the fiscal office
* Decide how event will be managed
	+ Use a project management tool (ie. Excel spreadsheet, Teams files and/or other tools at your disposal) to track responsibilities and deadlines
	+ Convene a planning team (if applicable)
	+ Create a contact list for the planning teach with name, number and their planning role
	+ Determine a point person for each part of the event
	+ Set reminders for all approvals that will be needed along the way
	+ Establish overall timeline and task list for event planning team
	+ Establish meeting times and frequency for the event planning
	+ Determine how registration will be received and if there will be a cost involved
* Submit event to OSU calendar via [go.osu.edu/calendar](http://www.go.osu.edu/calendar)
* Hire vendors if necessary. Be sure to review Ohio State’s [approved vendor list](file:///C%3A%5CUsers%5Csens.17%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CYGWFII5O%5Cbusfin.osu.edu%5Cbuy-schedule-travel%5Cpurchasing)
	+ Florist
	+ Photographer
	+ Audio visual
	+ Entertainment
	+ Caterer – discuss:
		- dietary issues
		- arrival time/set up time
		- set up plan
		- if volunteers will replenish food during event
		- leftovers plan
	+ Contract
* Share date with:
	+ [EHE internal calendar](https://portal.ehe.osu.edu/user/login?destination=homepage)
	+ [Outward facing web site calendar](file:///C%3A%5CUsers%5Cwhite.3127%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CCPEV1XTJ%5Cehe.osu.edu%5Cevents)
	+ Insider electronic newsletter
	+ Leadership team via Dean’s Assistant
	+ Any other audiences or list serves that would be interested in the event
	+ Contact EHE Office of Advancement if your audience includes alumni and/or donors

**3-6 MONTHS**

* Save the date communication
* Order any necessary materials – giveaways, Sharpies, name tags, etc. Some items, such as giveaways, can take several weeks to be approved and delivered.
* Set up registration; discuss with fiscal office if there is a charge for guests
* Submit ticket to MarCom for department services if needed:
	+ Think about marketing support, social media, communications, design needs, web site updates, photography
	+ Request a consultation with their team and the Dean’s Office as needed

**2 -3 MONTHS**

* Publicize event and send invitations (Note: you may want to do this even earlier depending on the nature of your event)
* Manage registrations and provide regular updates to planning team
* Receive any ordered items
* Consider print materials that may be needed
* Recruit volunteers if necessary
* Arrange parking – Parking passes can be purchased two ways through [CampusParc](https://osu.campusparc.com/). You can stop into CampusParc office to make a pcard purchase for a single day pass OR you can purchase multiple day passes through a [Workday request](https://workday.osu.edu/). See the ARC for a job aid on how to place a CampusParc order.
* Decide seating arrangements, including reserved seating for honored guests or college/university leadership (must contact Office of Advancement to discuss VIPs who are alumni or donors)
* Set up a walk thru time with venue, caterer, and anyone else involved

**1-3 WEEKS PRIOR**

* Confirm arrival time of
	+ Dean (if applicable)
	+ Leadership team
	+ Any VIPs (IF any VIPs are major donors or major gift prospects, communication must be discussed with EHE Office of Advancement)
	+ All vendors – request cell phone numbers in case there are issues during the event
* Presentations created and approved
* Seating arrangement finalized
* Email guests with last minute details regarding logistics, parking information, etc.
* Walk thru with VIPs
* Decide if a follow up feedback survey should be created and distributed after the event
* Communicate roles for and responsibilities for volunteers and support staff
* Discuss shot list and documentation plan with photographer and/or videographer

**ONE WEEK PRIOR**

* Final headcount to caterer, venue, staff, Dean, anyone else necessary
* Create name tags, agendas and other printed items
* Confirm all details with vendors

**EVENT DAY**

* Arrive one to two hours early for event prep
* Set up registration area; prepare for guests to arrive up to 30 minutes early
* Prepare a way to communicate during event with support staff – group cell phone text or other
* Prep technical items such as presentations
* Meet with volunteers re: responsibilities
* Run through program
* Check thermostat, lighting, and any other necessary settings

**POST EVENT**

* Feedback survey
	+ Distribute day after event
	+ Pull survey results report and distribute results to those involved
* Submit attendee information to EHE Advancement for tracking purposes
* Keep notes and an event summary for records
* Ensure vendors are paid
* Add final attendee list and any other details to Workday
* Send thank you notes to anyone necessary