# Event Guidelines

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**Introduction**

This handbook of Event Guidelines has been developed to help event planners make optimal use of Mount Vernon Nazarene University’s resources and to represent MVNU to its many audiences in a way that is of consistently high quality.

Every event, regardless of its size and scope, impacts the image of MVNU. Events help to build the reputation of MVNU with the many constituents that we serve. The impact of each event is directly related to its organization, execution, imagination, and interactivity.

This handbook provides for a consistent and coordinated look for the visual support of events (posters, fliers, invitations, printed programs, signs, displays, favors, videos, etc.). The quality of these materials also reflects on the University and the department/host. Maintaining the look from year to year for annual events will help you promote your event more effectively. The University logo should be the most prominent graphic image on any of these support items. Additional information is available in the University’s Graphic Standards Manual (available online at http://nzr.mvnu.edu/catalogs.html).

The marketing events coordinator will serve as an aid to departments sponsoring events. When planning a campus event, event sponsors should complete an event plan, found near the end of this guide, and submit it to the marketing events coordinator. The marketing events coordinator will also work closely with the creative services director, the director of communications and the executive director of marketing to publicize campus events. Following the event, a budget report, survey results, and debriefing information should be submitted to the marketing events coordinator.

Any questions not addressed in this guide should be directed to the director of special events, Jennifer Martin, at ext. 4351 or to the marketing events coordinator, Trinia Huddleston, at ext. 4320.
Planning and scheduling

Defining objectives and setting goals
As you begin planning an event, you will want to consider the following:

- What are the objectives and desired outcomes for the event? All MVNU events should convey one or more of the University’s key messages:

  * Key message one: Shaping Christ-like leaders
  * Key message two: Relevant and challenging academic programs
  * Key message three: A learning environment that strengthens and extends faith
  * Key message four: A foundation for a successful life calling

- Is an event the most appropriate strategy to achieve the stated goals and objectives?
- Do you have the time and resources necessary to implement an effective event? Early on, you will need to determine the budget for the event and the account number(s) for billing.
- How will you measure if you have achieved the desired objectives for the event?

When you can identify the answers to each of these questions, you are ready to schedule your event. Use of a planning guide can facilitate your planning and communication. For very large events, long-range planning is particularly important; you may need to begin planning 9-12 months prior to such an event. When scheduling an event, consider national and religious holidays, regional and district events, and University events that may conflict with your event. Please work with the Calendar Committee chairperson at ext. 4604 to have your on-campus events added to the University calendar.

Visit http://nzr.mvnu.edu/facilities/ to check availability of, or to reserve campus facilities. Included in the online request form are fields for Housekeeping, Safety and Security, and sound requirements.

To avoid scheduling conflicts, you may wish to send out “early announcements” to involved members of the University community (i.e. a simple e-mail with information about the event, date, time, and location) so they can reserve the date.

When you plan to have MVNU’s president and/or cabinet members present, be sure to coordinate information with the Office of the President and the appropriate cabinet members to ensure that the following guidelines are met:

- **Office of the President**
  Contact the marketing events coordinator at ext. 4320 as soon as the event date is chosen. Specify date, time, location, purpose of the event, audience, and the President’s role — particularly if the President will be making remarks. The marketing events coordinator will contact the President’s office.

- **Other special guests**
  Contact the marketing events coordinator to confirm if the University trustees; local, state or federal elected officials; and cabinet members are to be invited.
Mount Vernon Nazarene University Campus Facilities

The following MVNU campus facilities are available for special events. Although the capacity of each location will depend on your specific set-up needs for the event, the following provides some basic information about facility capacity.

<table>
<thead>
<tr>
<th>Name</th>
<th>Capacity/Room setup</th>
<th>Contact phone</th>
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<tr>
<td>Birch E Lobby</td>
<td>(sofas and chairs)</td>
<td>Resident Director</td>
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<td>Birch F Lobby</td>
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<td>Central Complex Lobby</td>
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<tr>
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<td>15 (conference table/chairs)</td>
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<td>588 (dining tables/chairs)</td>
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</tr>
<tr>
<td>Donoho Recreation Center</td>
<td>250 (small gymnasium)</td>
<td>Ext. 3100</td>
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<tr>
<td>Guest House</td>
<td>2 (guest accommodations)</td>
<td>Ext. 4100</td>
</tr>
<tr>
<td>Gymnasium</td>
<td>2,000 (large gymnasium)</td>
<td>Ext. 3100</td>
</tr>
<tr>
<td>Lakeholm Parlor</td>
<td>8 (conference table/chairs)</td>
<td>Ext. 4100</td>
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<tr>
<td>President’s Dining Room</td>
<td>144 (dining tables/chairs)</td>
<td>Ext. 4470</td>
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<tr>
<td>Prince Student Union</td>
<td>50 (café style set-up)</td>
<td>Ext. 4600</td>
</tr>
<tr>
<td>Ramser Room (Library)</td>
<td>20 (sofas and chairs)</td>
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All other facilities may be reserved online at [http://nzr.mvnu.edu/facilities/](http://nzr.mvnu.edu/facilities/).

Auditoriums and rooms should be closed at the proper time and the keys returned immediately to the proper person.

When using classrooms, auditoriums, athletic centers or University facilities for activities other than instruction, faculty members are to obtain clearance through the proper office listed above to prevent scheduling conflicts. It is the user’s responsibility to make special arrangements for other support services, such as physical plant needs, Pioneer College Caterers, safety and security, campus sound, or audio/visual needs. These arrangements should be made a minimum of two weeks prior to the event.

Whenever facilities are used, all items that have been moved must be returned to their proper place immediately after use. Items may not be moved between buildings without prior approval by the Housekeeping Department.

During summer months, all facilities are reserved through the facilities coordinator at ext. 4210.
Invitations

Guest lists

Define your target audiences and compile your invitation list for approval by your vice president, dean, or director. You may submit written requests for lists and mailing labels to Administrative Computing.

Request labels or a computer download sorted in zip code order for off-campus mailings. This makes it easier for Printing and Mailing to prepare your mailing.

Design and production of invitations

The marketing events coordinator will contact the creative services director for assistance with the design and printing of invitations. Campus maps, directions to campus, and lists of local accommodations can also be included with invitations.

The timeline for mailing invitations varies. Generally, the more prestigious the event, the more lead time you should allow. However, all event invitations should be mailed no later than four weeks prior to a scheduled event. You may wish to use fliers, posters, e-mail, or letters to promote more informal events.
The 10 Elements of an Invitation
(adapted from April Harris’s Etiquette and Protocol: A Campus Guide to Events)

Organization’s Symbol (1. University Logo)

Dr. E. LeBron Fairbanks (2. names of hosts)

requests the pleasure of your company (3. phrasing the invitation)

at a reception and dinner (4. kind of event)

in honor of (5. purpose of event)

John and Jane Doe

on Friday, the twenty-second of May (6. date)

two thousand and four

at eight o’clock (7. time)

Dining Commons (8. place)

800 Martinsburg Road

Mount Vernon, Ohio

R.S.V.P. (9. special instructions) Black Tie

Office of Special Events (10. where to R.S.V.P)

800 Martinsburg Road

Mount Vernon, Ohio

Phone number

1. The University logo

The University logo can be found in color or black and white at
K:/Common/Readonly/CreativeServices/logos. See the Graphic Standards Manual for usage specifications available online at http://nzr.mvnu.edu/catalogs.html.

2. The Names of the Hosts

In a formal invitation, the full name is spelled out. In an informal one, initials may be used. It is important to remember that people do the inviting, not organizations. There always should be a human being who does the inviting, or at least a group of people, “The Mount Vernon Nazarene University Board of Trustees invites you to…”

When there are several hosts, the senior person’s name comes first. If you have a large group of hosts of more or less the same rank, list them alphabetically at the top of the invitation.
3. Phrasing the Invitation

“Requests the pleasure of your company at” is the most formal style invitation. Less formal are the phrases “invite(s) you to join us” or “cordially invites you to…”

4. The Kind of Event

Is this a reception, buffet, ribbon-cutting ceremony, brunch, etc.?

5. The Purpose of the Event

Your invitation will be most effective if it includes the purpose of the event. The purpose is best communicated by using a specific action or function: “to meet,” “to celebrate,” “to commemorate,” “to dedicate,” “in honor of.”

6. The Date

The date is always written out in a formal invitation. Example: Saturday, the twentieth of January

Less formal invitations can use the more common, Saturday, January 20.

Do not use abbreviations for dates on invitations.

7. The Time

For more formal invitations:

at nine o’clock
at half after six o’clock

For informal:

6:00 to 8:30 p.m.

8. The Place

Always include the formal name, the room, the floor, street address, and city.

9. Special Instructions

This is located in the bottom right-hand corner of the invitation. Messages that can be placed here include:

Invitation not transferable
This invitation admits one only
Please present this invitation at the door
Tickets will be held at the door
Map enclosed
Rain date
Black tie or Black tie optional
Dress warmly and wear comfortable shoes for the walking tour.
10. **R.S.V.P. Information**

The letters “R.S.V.P.” are in the bottom left-hand corner of the invitation, with the following printed below them: the name of the person and his/her telephone number, fax number, e-mail address.

If using a printed R.S.V.P. card and matching envelope, use the statement “R.S.V.P. card enclosed.” It should include a place for the name of the person(s) attending, a space to accept or regret, and the telephone number of the respondent. The invitation, envelope, R.S.V.P. card, and return envelope should always be the same paper, font, and color. The return address on the envelope should always include the MVNU logo in the upper left-hand corner. (See the Graphics Standards Manual.)

- For more informal invitation or when time won’t permit waiting for replies to be returned by mail, simply use R.S.V.P. and a phone number and/or e-mail address.
- Don’t use the phrase “regrets only.”
- Don’t put a cut off date under R.S.V.P. on formal invitations. If you need to state a deadline to respond, put it on the response card.
Mailing the invitations

For formal invitations, whenever possible, envelopes should be addressed by hand using a pen with ink matching the color of the ink on the invitation.

With the exception of large, open athletic events or selected alumni events, invitations should not be stamped using the meter machine. Envelopes should be mailed using first-class postage.

Printing and Mailing will stuff, sort, and post your invitation. Please allow five working days to complete your mailing. If your mailing is not of standard size, please call Printing and Mailing at ext. 4452 to discuss your needs in advance, and the staff will let you know the best way to proceed.

Complete an order form for mail services, a sample of which is on page 36.
Publicity
Publicizing and promoting events requires the same care and planning as the event itself. Consider:

• pre-event publicity opportunities to generate maximum attendance
• ideas for post-event coverage

Prior communication needs to be carefully targeted, repetitive, and integrated to achieve greater effectiveness. Pre-event publicity can include a mix of news releases, calendar notices, public service announcements, postings to the MVNU Web page, mass e-mail, banners, fliers, posters, and/or advertisements. Contact the marketing events coordinator for all publicity requests.

Media Services
The director of communications will provide information on the appropriate mix of media strategies (press releases, media advisories, campus newsletters or Mount Vernon NOW, calendar notices and public service announcements, magazine or newspaper advertisements) to promote your event. The creative services director will coordinate the placement of the event information on the MVNU Web site.

Photography
If you require photographic services for your event, you will be asked to provide information in order to complete an assignment form to identify specific photos desired. Photographic assignments will be made by the creative services director and will be scheduled no later than three weeks prior to the date. There is a charge for prints or CDs requested.

Public service announcements
The director of communications will develop and coordinate the placement of public service announcements (PSA) on WNZR and all other applicable stations as required.

Fliers and posters
Fliers and posters should be designed to complement the invitations. All necessary information in order to design the project should be given to the marketing events coordinator at least 3-4 weeks in advance. All posters/fliers must follow the Brand Strategy and Graphics Standards Manual, which can be viewed at http://nzr.mvnu.edu/mvnu_standards_manual.pdf. All fliers and posters must be approved by the creative services director.

To support the efficient and timely design of a poster or flier, information about the name, purpose, date, time, location, and cost of the event should be provided to the marketing events coordinator. In addition, the following information may be needed, depending on the size and the nature of the event: event sponsors, cost, parking information, information about attire, ticket information, rain location, and rain date.

If distributing fliers/posters to all students on campus, work with the post office to determine the exact number needed. If posting fliers on campus, contact Student Development for prior approval. In order to submit a campuswide announcement, e-mail switchboard@mvnu.edu. Only student organizations or current faculty and staff can submit mass mailing requests.
Advance preparations
The Event Checklist (Page 25-26) can assist with organization of responsibilities and advance preparations for an event. From scheduling and planning to guest relations and follow-up, the checklist provides a basic list of items that need to be completed for each event.

Catering
Contact the marketing events coordinator at ext. 4320 for more detailed information about resources or for assistance with menu selections. The marketing events coordinator will work with Pioneer College Caterers. Please make location arrangements as soon as a date is secured. Menus must be selected at least one month in advance.

Chapel Food Policy
Auditorium: Other than water and communion elements, there are to be no food or drinks in the main auditorium.
Nease, Thorne, Lobby, and Art Gallery: As outlined below, limited food and drinks are allowed.
Drinks: Permitted - Coffee, tea, milk, and light-colored juices and sodas
Not permitted - Drinks such as grape juice and dark-colored punches and sodas that would leave a stain if spilled.
Food: Permitted - Finger foods should be the rule, including such things as cookies, chips, pretzels, donuts, muffins, fruit, cheeses, and hors d’oeuvres.
Note: Pastries are permitted only for Homecoming and Orientation events.
Not permitted - Ice cream, pizza, and foods with sauces.
Chapel 102-103: Other food items, including pizza and ice cream, are permitted if consumption can be contained in these rooms.

Set-up
Please contact the marketing events coordinator at ext. 4320 for more detailed information about resources or suggestions. All Housekeeping/Physical Plant requests must be done two weeks prior to the event.

Campus Sound
Campus Sound can provide equipment for on-campus events. Be sure to check the operation of all audiovisual equipment before the guests arrive. The marketing events coordinator will contact Campus Sound to arrange a sound technician or discuss specific needs at your event. Some key information to include in sound requests is: sound technician needed at event or just at set-up, sound check time, event time (beginning and end), and equipment needs (microphones, podium, CD player, etc.) All requests must be done two weeks prior to the event.

Computer Assistance
For computer helpdesk, network, or projection problems, please contact ext. 5555 or e-mail helpdesk@mvnu.edu. There are also frequently asked questions online at http://internal.mvnu.edu/common/helpdesk/helpdesk_faqs.html. All requests must be done two weeks prior to the event.
**Visual support**
Strive to have a consistent, coordinated look for all of the visual support for your event (posters, fliers, invitations, printed programs, signs, displays, favors, videos, etc.). The quality of these materials also reflects on the University and the department/host. Maintaining the look from year to year for annual events will help you promote your event more effectively. The University logo should be the most prominent graphic image on any of these support items. Additional information is available in the University’s Graphics Standards Manual. The marketing events coordinator can assist you with your invitation, poster, and other design needs and will coordinate the development with the creative service director.

**Nametags**
Whenever possible, preprinted nametags should be prepared for all guests and arranged in alphabetical order at the registration/check-in table. Always have blank name badges and either a printer or a quality pen available in case you have to make changes/additions to the nametags.

**Signs**
Contact the marketing events coordinator at ext. 4320 for assistance with production of all signage, displays, etc. Signage should be adequate to guide guests from the parking lot; direct guests within buildings; welcome guests to the event; and identify special features of the event. Signs should be large enough to be easily viewed from a distance. If the event is held regularly, you can have vinyl signs created and reuse them for several years.

**Promotional items**
Given sufficient budget and time, the Events Office can assist you with ordering special items specifically for your event. Allow one to two months if planning to order giveaways.

**Student Ambassadors**
The MVNU Student Ambassadors are a prestigious student association. Admission to the program is highly selective, and Student Ambassadors complete a comprehensive training program. Student Ambassadors provide assistance with personal tours, meeting and greeting guests, registration, special seating, and other important aspects of guest relations. To arrange for a Student Ambassador to assist with your event, complete the form on page 36, and send it to the marketing events coordinator.

**Switchboard**
Send important event information to the Switchboard Coordinator just before the event is publicized. This will help callers be directed to the right office.

**Safety and Security**
Please notify safety and security of any large event on campus.

**Musical Entertainment**
The music department has a list of students and musical groups who can perform at special events for a fee.
Transportation
If campus buses or vans with drivers to transport guests on- or off-campus are required, the marketing events coordinator can assist with arrangements. All drivers must be certified.

Parking
For ice/snow removal for the parking lots, sidewalk and walkways, call Physical Plant at ext. 4430. Always take the weather into consideration when planning parking. If it is raining, can guests be escorted to the event by students/staff carrying umbrellas? Will slippery sidewalks create problems? How will you handle umbrellas and overcoats when guests arrive and depart? Will your signs withstand heavy rain/snow? For assistance with parking at large events, please contact Safety and Security for assistance from officers a couple weeks in advance.

Working with minors
Background checks are required at events involving minors for any non-MVNU faculty, staff, or students serving as volunteers or hired help. The marketing events coordinator can direct you to the appropriate campus department to handle this.

Special needs
Consider access for those who might have difficulty negotiating stairs or curbs. Assign a staff person to assist those with special needs from the parking lot, to your event, and back again or in the cafeteria with food, seating, etc. Student Health Services has wheelchairs available for guests who require such assistance. The marketing events coordinator can assist in reserving these in advance.

Contingency plans
Sometimes overlooking a small detail can diminish an otherwise effective event. To avoid this, it is best to anticipate as many potential problems as possible — poor weather, traffic problems, unexpected guests — and be prepared with a contingency plan. This includes thinking of strategies to help build attendance or to change venue if only a small number of individuals confirm attendance; making arrangements for escorts with umbrellas for inclement weather; considering what to do if the primary speaker is detained or cancels at the last minute; and arranging for security.
Protocol and guest relations
Two factors are very important to the success of any special event:

- The president, cabinet members and other program participants have been adequately briefed about the order of program and the guests who will be attending.
- Adequate staff is available to handle guest relations effectively.

Cabinet briefing
One week prior to the event, the marketing events coordinator will ask you to provide the following details: background information on the guests who will be attending (particularly those with whom cabinet members will be seated); the names of special guests who should be formally recognized; staff attending and other pertinent information. The marketing events coordinator will communicate with cabinet members and University president.

Sample background information
Name: Mr. John Alumnus
Year of graduation: ’79
Major/degree: B.B.A., Marketing
Home address: 1 Mockingbird Lane, Columbus, OH 43235
Place of business: Riverside Hospital
Occupational title: Director of Business Affairs
Donor history (giving total): $750
Activities: Varsity K Hall of Fame Inductee

Name: Ms. Patricia Alumna
Year of graduation: ’81, ’85
Major/degree: B.S.N., M.S.N. (Nursing)
Home address: 1 Mockingbird Lane, Columbus, OH 43235
Place of business: Riverside Hospital
Occupational title: Director of Patient Care Services
Donor history (giving total): $1,250
Activities: School of Nursing Alumni Council

Seating
For more formal events, a seating chart should be prepared and reviewed in advance by the cabinet members and the president. The president should be seated with the most important guests. Other honored guests should be seated at adjacent tables. Trustees, cabinet members, and other University staff may be asked in advance to host a table. The president’s table should be located where it provides a good overview of the room, but it need not necessarily be labeled as table one.

Two seating lists should be prepared: one in alphabetical order and one by table number. For on-campus events, the seating chart should also be given to the banquet and catering staff and to all event staff.
**Introductions**
The following people should be formally recognized during an event:
- MVNU trustees, president and cabinet members;
- Elected officials (representatives, state senators, members of the Ohio House of Representatives, local elected officials, members of the Ohio Board of Regents);
- Guests of honor/head table and other significant guests; and
- Foundation Board and/or Alumni Association board members.

The Events Office uses April Harris’s *Etiquette and Protocol: A Campus Guide to Events*. A copy is located in the Events Office for specific protocol questions.

**Guest relations**
All staff, including students or volunteers, who are assisting with guest relations should have some designation (nametag, ribbon, button) that identifies them as event hosts/hostesses.

Proper attire is required for all personnel assisting with university events. Generally, this means business attire, but for more informal events, business casual is acceptable.

One staff member should be designated to coordinate students/volunteers who are assisting.

One or two days prior to the event, a briefing and “walk through” should be held for all staff who will be helping with the event to review the order of program, all assignments, etc.

Although the number of staff necessary to host an event effectively will vary based on the size and type of event, the following guidelines should be used when hosting a large event attended by many people from outside the university community.

- At least two staff members should be on duty one hour prior to the start of the event and at least two staff members should be on duty until the last guest has left.

- One person, generally the event coordinator, should be available to handle last-minute or unanticipated problems.

- Four to eight people should be assigned to greet guests. These can include student workers and volunteers, and they should be placed in strategic locations that have been determined in advance.

- Two to eight staff should be assigned to a registration/check-in table. The number of staff should be adequate to facilitate quick registration and to avoid bottlenecks. A coat check, if needed, should be staffed. Sometimes a student organization will volunteer to help with coat check.

- Four to eight staff members should be assigned to escort guests to appropriate tables if seating has been pre-assigned.
• One person should be assigned to introduce important guests to the president, trustees, and other special guests and to assist the photographer in coordinating special photo opportunities. Plan the various groupings you would like covered at the event. The university president, trustees, executive officers and special guests should generally be included. Assign one person to work with the university photographer to assist in bringing these individuals together for photographs.

• Special consideration should be given for guests of honor from out-of-town, including arranging for airport transportation, hotel accommodations, transportation to and from the event, and placing a guest basket in their hotel room.

• The director of communications will serve as the contact for any media attending the event.

Evaluation
An event will meet MVNU quality standards if the following criteria are met:

• The following are clearly articulated as part of the initial planning process:
  – target audience(s)
  – key messages to be communicated
  – objectives for the event
  – measurement/criteria (to determine if objectives have been achieved)

• The Special Events Office is notified early in the planning process so that the appropriate support can be provided.

• Provisions have been made for special transportation needs, inclement weather and other contingencies.

• The invitations contain all 10 elements identified in this guide.

• The visual support (invitations, posters, fliers, printed programs, signs, podium, decorative elements, etc.) for the event has a consistent, coordinated look. The University logo should be the most prominent graphic image, and all pieces should comply with the graphic standards.

• Nametags have been made.

• Elected officials, trustees, cabinet members, and special guests are introduced according to protocol and any seating plans have been reviewed in advance.

• The trustees, president, and cabinet members attending the event have been briefed of the schedule, script, guest list, and background of attendees.

• A welcoming atmosphere has been created, including:
  – signs that welcome and direct people
  – greeters as people arrive
– sufficient staff to coordinate registration, special seating, etc.

- A site “walk-through” has been conducted, all audiovisual equipment has been checked, etc.

**Follow-up**
Thank you notes/mementos should be sent to special guests of honor and to everyone who assisted with the event.

For events to which alumni/prospective donors are invited, provide the Development or Alumni Offices with a list of people who are planning to attend. After the event provide a list of people who attended, as well as those who accepted but did not attend, so that this information can be used to update the database.

Send copies of appropriate materials to on- and off-campus guests, including those who were invited but were unable to attend.

Insert a written evaluation and budget report in the event file, determine the committee for the future (if needed), and reserve future dates and facility space.

A copy of event evaluation, debriefing, budget report, and Economic Impact information should be sent to the marketing events coordinator.

**Off-campus events**
The same quality standards outlined in this guide apply for University events being held at off-campus locations. For assistance in selecting a location, contact the marketing events coordinator at ext. 4320.
Resources and Forms
<table>
<thead>
<tr>
<th>Department</th>
<th>Phone Number</th>
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</thead>
<tbody>
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<td>Student Government</td>
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<td>Student Health</td>
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<tr>
<td>University Advancement</td>
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</table>

Hotlines:
- Cougar Athletics: 1601
- Cafeteria Menu: 1602
- Concert line: 4451
- Drama line: 1620
- School Closings: 1600
- WNZR line: 1605
- Women’s Auxiliary: 4050
EVENT PLAN

Event name: _____________________________________________________________

Event sponsors: __________________________________________________________

Key message(s) to be conveyed: _____________________________________________

Program coordinator: ______________________________________________________

Event day, date, time: ______________________________________________________

Location: _______________________________________________________________

Target audience(s): ________________________________________________________

Program/agenda: _________________________________________________________
________________________________________________________________________
________________________________________________________________________

Budget: _________________________________________________________________

To which account(s) will this be charged? _____________________________________

Cost charged per person: ___________________________________________________

Planning team: ___________________________________________________________
________________________________________________________________________

Evaluation criteria: How will we measure the success/impact of the event? ___________
________________________________________________________________________

Event Plan distribution: ____________________________________________________
________________________________________________________________________

Post-event evaluation: _____________________________________________________
________________________________________________________________________

**Directions:** This form is to be completed by the event contact person prior to planning any campus event. Submit to the marketing events coordinator via campus mail or e-mail at thuddles@mvnu.edu.
## Planning Guide for Events

Name of event:________________________  Date of Event: _____________________

<table>
<thead>
<tr>
<th>Action</th>
<th>Campus Contact</th>
<th>Person Responsible</th>
<th>Due Date</th>
<th>Status/comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning and Scheduling</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Determine objectives, budget, and team to coordinate the event</td>
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<tr>
<td>Reserve Location</td>
<td>Facilities Coordinator</td>
<td></td>
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<tr>
<td>Reserve event date on appropriate calendar</td>
<td>Calendar Committee</td>
<td></td>
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<tr>
<td>Prepare invitation list and have it approved by appropriate cabinet member</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine order of program/activities/agenda</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine menu/beverages</td>
<td>Pioneer College Caterers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make any special parking arrangements necessary</td>
<td>Safety &amp; Security</td>
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<td></td>
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<tr>
<td>Prepare and distribute event action plans</td>
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</tr>
<tr>
<td>Action</td>
<td>Campus Contact</td>
<td>Person Responsible</td>
<td>Due Date</td>
<td>Status/ comments</td>
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<tr>
<td><strong>Invitations</strong></td>
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<tr>
<td>Create invitation (fliers, letters, formal invitations)</td>
<td>Marketing Events Coordinator</td>
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<tr>
<td>Have invitation approved by cabinet member and creative services director</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Determine R.S.V.P. deadline</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Order address labels</td>
<td>Administrative Computing</td>
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<tr>
<td>Check mailing requirements (bulk mailing, postage panel of invite, etc.)</td>
<td>Printing and Mailing</td>
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<tr>
<td>Mail invitation</td>
<td></td>
<td></td>
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<td>Send a copy to Switchboard</td>
</tr>
<tr>
<td>Create database to track R.S.V.P.s</td>
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<tr>
<td>Create reminder mailing if necessary</td>
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<tr>
<td>Advance Preparations</td>
<td>Campus Contact</td>
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<td>Status/Comments</td>
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<tr>
<td>-------------------------------------------------------------------------------------</td>
<td>---------------------------------</td>
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<td>-----------------</td>
</tr>
<tr>
<td>Determine facility set up (registration, podium, additional trash cans)</td>
<td></td>
<td>Creative Services Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine table decorations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create or purchase signs, displays, banners needed</td>
<td>Creative Services Director</td>
<td></td>
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<tr>
<td>Complete a Physical Plant work request to have large signs hung (must be done 2 weeks prior)</td>
<td></td>
<td></td>
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<tr>
<td>Make arrangements for entertainment if needed</td>
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<td></td>
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</tr>
<tr>
<td>Prepare any media or public announcements/ advertising</td>
<td>Marketing Events Coordinator</td>
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<tr>
<td>Plan for photography needs</td>
<td>Creative Services Director</td>
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<tr>
<td>Request lighting, sound system, video/ PowerPoint</td>
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<tr>
<td>Order any items/favors/award plaques or special gifts</td>
<td>Marketing Events Coordinator</td>
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<tr>
<td>Make arrangements for guests with special physical or dietary needs</td>
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<tr>
<td>Prepare confirmation letters to be sent with maps, tickets, etc.</td>
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<tr>
<td>Guarantee meal count (at least three days in advance)</td>
<td>Pioneer College Caterers</td>
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<tr>
<td>Guest Relations/Protocol</td>
<td>Campus Contact</td>
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<td>Due Date</td>
<td>Status/Comments</td>
</tr>
<tr>
<td>--------------------------</td>
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<td>-----------------</td>
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<tr>
<td>Prepare R.S.V.P list, including names, spouse/guest names and special needs</td>
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<tr>
<td>Prepare nametags and place cards</td>
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<tr>
<td>Prepare seating chart, to be approved by cabinet member</td>
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<tr>
<td>Prepare two lists for the seating plan - one in alphabetical order and one in order by table number</td>
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<tr>
<td>Schedule staff and volunteers to greet, handle registration, escort to tables, assist those with special needs</td>
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<tr>
<td>Provide all staff and volunteer with briefing information</td>
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<tr>
<td>Provide program participants with information about the order of program, background information on attendees, seating arrangements, etc.</td>
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<td><strong>Follow up/Evaluation</strong></td>
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<td><strong>Due Date</strong></td>
<td><strong>Status/Comments</strong></td>
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<td>-------------------------</td>
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<tr>
<td>Debrief with appropriate people</td>
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<tr>
<td>Send thank you notes</td>
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<tr>
<td>Make report to the file for future reference</td>
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<tr>
<td>Send budget, debriefing, survey results, etc. to Marketing Events Coordinator</td>
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</tr>
<tr>
<td>Send Economic Impact information to Marketing Events Coordinator</td>
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</tbody>
</table>
Event Checklist 1: Scheduling and Planning
Event planning requires attention to detail. The events office recommends using this checklist as a starting point for planning and scheduling a successful program.

- Determine objectives, a budget, and a team to coordinate the event.
- Complete or work with the marketing events coordinator to complete an event plan.
- Determine date and time.
- Determine location.
- Reserve event on appropriate calendars.
- Prepare invitation list and have it approved by appropriate vice president or dean.
- Determine order of program/activities/agenda.
- Determine menu/beverages.
- Prepare and distribute planning guides to everyone involved.

Event Checklist 2: Invitations
Event attendance is key to a successful event. To ensure strong attendance, use this invitation checklist.

At first glance, it may seem as if invitations, entertainment, decorations, and parking are unrelated. Not so. As you work through the checklist, you will realize that it's crucial to have the correct information on your invitation. It also becomes clear that your entertainment and decorations will help drive the design of your invitations. These steps will help guide you through the process:

- Determine invitation content.
- Have draft approved.
- Determine R.S.V.P. deadline.
- Order address labels (contact Administrative Computing).
- Determine facility set up with regard to registration, podium, waste baskets, tables, chairs, etc.
- Determine decorations for table, stage, etc.
- Determine special equipment requirements: lighting, sound system, video, or PowerPoint.
- Determine entertainment needs.
- Mail copy of invitation to Switchboard so people calling in can be directed to the correct office.
- University signage, such as banners and display cases, as well as assistance with ordering special items, favors, award plaques or other special gifts, can be secured with the Events Office.
- Complete a Physical Plant work request for any large signs that need hung (must be done 2 weeks prior to date needed).
- Determine requirements for guests with special needs.
- Determine parking requirements, including special passes.
- Prepare confirmation letters to be sent with maps, parking passes, tickets, etc.
Event Checklist 3: Guest Relations
Naturally, guest relations are an important part of your actual event. The Events Office reminds you that some preliminary planning is also beneficial. As a result we recommend:

- Outline R.S.V.P. list including names, spouse/guest names, and special needs.
- Prepare nametags and place cards.
- Prepare seating chart to be approved by vice president or dean.
- Prepare two lists for the seating plan — one in alphabetical order and one in table number order.
- Schedule staff and volunteers to greet, check coats, handle registration, escort guests to tables, and provide assistance to those with special needs.
- Share briefing information with all staff and volunteers.
- Gather information for the president and cabinet members, including order of program, background information on attendees, seating arrangements and any other relevant details and send the information to the marketing events coordinator.

Event Checklist 4: Evaluation
Although the checklist recommended for use after your event is short, it includes important steps to help ensure future success. Try to remember to:

- Debrief appropriate individuals.
- Send thank you notes.
- Create a report to file for future reference.
- Send budget report, debriefing, survey results to the marketing events coordinator.
Event Name ________________________________ Event Budget ____________________________
Date ______________________ Location______________________________________________
# of attendees______________________________________________________________

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<th>CATEGORY</th>
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<td>Design/printing - program</td>
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<td>Mount Vernon News ads</td>
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<td>Other ads</td>
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<tr>
<td>TOTAL</td>
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<td>$0.00</td>
</tr>
</tbody>
</table>

This final budget includes the following significant changes from the estimate:
Example: Decrease invitation weight which lowered postage costs.
Example: Change in venue which raised facility rental fee.

Statistics
Invitations Sent: 500 [which actually equals 1000 potential guests]
Number of invitees: 1000
Acceptances: 200 (20%) [# of acceptances divided by # of invitees]
Catering Guarantee: 190 [equals about 95% of acceptances]
Actual Attendance: 190 (95%) [# of attendees divided by # of acceptances]
Attrition: 10 guests or 5% [# of no shows]

Prepared by: Event Manager
Date:
BUDGET PLANNING CHECKLIST

FOOD SERVICE
- Number of people to be served
- Cost per person
  - Coffee hour
  - Luncheon
  - Dinner
  - Afternoon break
  - Other beverages
- Table linen

VENUE COSTS (Off campus only)
- Rental of meeting or reception room(s)
- Overnight accommodations
- Rentals
- Special electrical or telephone hookups
- Set-up and clean-up charges
- Venue/stage managers
- Stage crew
- Coat check staff
- Parking/traffic control staff
- Security
- House staff

EQUIPMENT RENTAL (Off campus only)
- Canopy or tent
- Tables
- Chairs
- Flooring or carpeting
- Risers
- Ropes or stanchions
- Podiums/podium lights
- Props
- Registration tables and chairs
- Portable restrooms
- Booths
- Heaters
- Fans
- Easels/sign standards/weights
- Coat racks/hangers
- Mirrors
- Backdrop or trellis
- Trash containers
- Lighting
- Sound
- Fencing
- Generators
- Delivery/strike
- Catering kitchen rentals
  - Tables
  - Ovens
  - Lights
  - Tents/trellis

**DESIGN AND PRINTING**
- Advance announcements/save the dates
- Invitations
- Confirmation cards
- Programs
- Tickets
- Maps
- Placecards/table assignments
- Signs
- Registration packets
- Name tags and holders
- Table numbers
- Alphabetical registration cards
- Any other printed materials

**POSTAGE AND SHIPPING**
- Postage for mailing printed materials
- Bulk mail of promotional materials
- Mailing house charges
- Shipping and handling

**DECORATIONS**
- Flowers
- Table decorations
- Extra plants
- Props
- Candles/candelabra/votive
- Direction signs
- Podium décor
- Stage scenery
- Other decorations (i.e. ribbon, balloons, etc.)

**AUDIO-VISUAL EQUIPMENT (Off campus)**
- Slide, data, overhead, and film projectors
- Teleconferencing services
- Screens
- Extension cords
- Projector carts
- Microphones
- Mixers
- Speaker system
- Teleprompter
- Jumbotron
- Malt boxes/press patch
- Computers
- Still store
- Tape recorder
- Television monitors
- VCRs
- Pointers
- Flip charts
- Blackboards/white board
- Technician and operator services

**ENTERTAINMENT**
- Fees
- Promoter fees
- Hospitality

**PUBLICITY**
- Advertising
- Printed photos/photo albums/proof sheets
- Videographer
- Mailing
- Banners

**OFFICE EXPENSES**
- Overtime and compensatory time
- Additional staff (temporaries, students)
- Telephones and toll charges
- Postage for general correspondence
- Supplies (pens, pads, decals, folders, nametags)
- Committee materials
- Cuebook materials
- Hospitality for committee members/volunteers
- Complimentary tickets
- Staff accommodations
- Staff travel and expenses

**MISCELLANEOUS**
- VIP travel and expenses
- Honoraria
- Gifts
- Mementos
- Security
- Fire marshal
- Medical personnel
- Permits
- Internet access (Web design, Web-casting)
Campus Event Cafeteria Form

Event name: _____________________________________________________________
Person responsible: _______________________________________________________________________________________
E-mail: ______________________________________ Phone number: ______________________
Event location: _____________________________________________________________
Event date: ________________________________________________________________
Start time: ______________________ End time: ________________________________
Number attending: ________________________________________________________
Type of meal: _____ served _____ buffet _____ break
Menu: __________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Special needs: __________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Linen color: __________________________________________________________________________
Pioneer staff on site: _____ yes _____ no

Pioneer staff use only

Quoted price: __________________________________________________________________________
Number of tables needed*: __________________________________________________________________

*The marketing events coordinator will coordinate the table request with Physical Plant. This must be done at least two weeks prior to the event and is for events held outside.
# CATERING WORKSHEET  
(for use with off-campus vendor)

<table>
<thead>
<tr>
<th>Vendor Information</th>
<th>Checklist</th>
<th>Completed</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of caterer</td>
<td>Choose dining format</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact person</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone number</td>
<td>Estimate guest count</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alternate contact</td>
<td>Get estimate/proposals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alternate phone</td>
<td>Choose caterer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;Day of&quot; phone</td>
<td>Ensure caterer has adequate insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell phone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax number</td>
<td>Establish purchase order/PAC #</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td>Set up tasting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Banquet captain</td>
<td>Choose menus</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Things to ask:**

- Cancellation policy
- Deposit required
- Deposit due date
- Insurance certificate
- Service rate (gratuity)
- Tax rate
- Overage percentage

<table>
<thead>
<tr>
<th></th>
<th>Completed</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>$...........</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Finalize menus</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Discuss special menu needs</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
<tr>
<td>($...</td>
<td>Head count guarantee/seating</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(kosher, low fat, vegetarian)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>/</strong>__</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Catering/menu/contract details**

- Read banquet event order carefully to ensure it reflects all details of your order: date of event, timing of service, deposit requirements, billing, cancellation policies, and gratuity percentage.
- Food prices are often quoted “plus plus” – the service and the sales tax – meaning those figures are not calculated in the price per person and must be added to the overall cost.
- Provide a conservative catering guarantee. The average no-show rate is 10%.
- Most caterers build a plus-or-minus percentage overage (often 3-5%) into the guarantee.
- Give banquet manager a copy of your program and walk through the timing with them.

**Menu planning**

- Provide a variety of foods/offer vegetarian/healthy selections. Consider allergies/offer options.
- Be mindful of cultural preferences for international guests.
- When serving sodas, offer regular, diet, and caffeine-free. For coffee service, provide 70% regular and 30% decaffeinated.
- Make sure hors d’oeuvres or finger foods can be eaten in one/two bites easily.
- Make sure eating utensils are provided when appropriate – some guests prefer to eat even finger foods with utensils.
- Do not trim budgets by reducing the quality of the food or number of wait staff – instead consider alternatives to expensive items.
- For pre-meal cocktail hours, four to six hors d’oeuvres per person per hour is adequate. For receptions, plan on five to seven pieces per person per hour, plus a stationary display or two. For each subsequent hour, decrease the number of pieces.
Staffing guidelines
- Need one server for every 15 people for sit-down meal (for quick service, one server for every 10).

Setup/service
- Ask the catering manager to label all food on a buffet.
- Need one double-sided buffet line for every 75 to 100 people.
- Have beverage service ready 30 minutes prior to the start of event, with food ready 15 minutes prior, to avoid quality deterioration.
- Recommend no catering service during your program – if appropriate, have wait staff leave carafes of coffee or beverage on tables.
**SPEAKER/PRESENTER WORKSHEET**

<table>
<thead>
<tr>
<th>Speaker Information</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of speaker</td>
<td>Lectern</td>
</tr>
<tr>
<td>Department/School</td>
<td>Microphone</td>
</tr>
<tr>
<td>Contact person</td>
<td>-Type: Lapel</td>
</tr>
<tr>
<td>Phone number</td>
<td>Data projector</td>
</tr>
<tr>
<td>Alternate phone</td>
<td>-Mail disk with presentation</td>
</tr>
<tr>
<td>“Day of” phone</td>
<td>-Bring own laptop</td>
</tr>
<tr>
<td>Fax number</td>
<td>Laser pointer</td>
</tr>
<tr>
<td>Address</td>
<td>Video needs</td>
</tr>
</tbody>
</table>

**Checklist**

- Discuss presentation
- Obtain presentation title
- Obtain presentation synopsis
- Obtain speaker bio
- Obtain speaker photo
- Confirm transportation needs
- Discuss rehearsal schedule
- Send letter confirming logistics

**Notes/Suggestions**

**Early Discussions**

- Book speakers as early as possible. Popular speakers’/personalities’ calendars can be completely booked over a year in advance.
- Be clear with speakers about the nature of your event, what is expected of them, the type of remarks they will be asked to deliver, the length of their remarks, deadlines, etc. to avoid misunderstandings.
- Follow up with the speaker in writing regarding their presentation and the discussions that took place, including printing deadlines.
- Request photo, bio, synopsis, etc. in plenty of time for printed material publication.
- If travel arrangements are needed, such as airfare, hotel or driver, discuss the arrangements with the speaker early and clarify who will make the arrangements and how they will be paid for, i.e. will speaker pay first and then be reimbursed, will the University make all arrangements, etc.
- If hotel arrangements are made, it is nice to provide a hospitality gift in their room, including information on the event, copy of the agenda, guest list, etc.
- Provide the speaker with clear directions to campus, directions on where to park, how to access building via a campus map, etc.
- Make sure the speaker is met and greeted by an official representative of the University to escort them and provide them with guidance.

**Staging/Audio-visual**

- Ensure that room temperature water with no ice is available for speakers on stage/at lectern.
- Remember that speakers stand upon a “podium” or platform riser and speak behind a “lectern.”
- If the speaker is providing his or her own audio-visual equipment, be sure it is compatible with any audio-visual equipment you are providing. If you are unsure, ask your audio-visual technician.
- Make sure it is clear who is running the audio-visual presentation, whether the speaker will via remote, or whether they will ask an audio-visual technician to do so.
- If a screen is being used, make sure the speaker can see the screen from where they will present.
- Always make sure an audio-visual technician is available at speaker rehearsals/presentations to troubleshoot any problems.
Student Ambassador Request Form

Today’s date ____________________
Date needed ____________________ Number of Ambassadors requested _________________
Name of event _________________________________________________________________
Event description _______________________________________________________________
Event location _________________________________________________________________
Report location _________________________________________________________________
Job report time _____________________ Job end time ________________________________
Job duties _____________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
Contact person and department __________________________________________________
Send e-mail confirmation to _______________________________________________________
Phone ______________________________ Fax ______________________________________

Note: Confirmation will be sent 5-7 days before the event. The marketing events coordinator will attempt to accommodate each request; however, student class schedules determine availability.

Return form to: Marketing Events Coordinator, Lakeholm Administration Building, Third floor Phone: 392-6868, ext. 4320; Fax: 397-3191

OFFICE USE ONLY

Ambassador Sign-up

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td>4.</td>
<td></td>
</tr>
</tbody>
</table>
Order for Mail Service

Department to complete:
Department _________________________________ Account Number __________________

Today’s Date ___________________ Date Needed ____________________________________

Mailing Name ______________________________________ Number of Pieces ____________

Description of Mailing
______________________________________________________________________________

Envelopes to be used _____________________________________________________________

BREs to be used ________________________________________________________________

Services Requested:

_____ 1st Class    _____ Bulk Mailing    _____ Folding

_____ Tabbing    _____ Inserts    _____ Other ___________________

List Inserts
______________________________________________________________________________

Special Instructions
______________________________________________________________________________

Authorized By _________________________________ Phone Number ___________________

Mail Service Only

Materials Received: _____ Network    _____ Other

Date Completed ____________________ Date Mailed ______________________________

Billing:

Docutech Printing
________________________________________

Laser Printing
________________________________________

Postage
________________________________________

Other
________________________________________

Total
________________________________________