



# Event Planning Guidelines

**“In all that we do, we aspire to exemplary execution and to represent UNC Charlotte in a first-class manner.”**

Chancellor Philip L. Dubois



The information below is intended as a guide for planning a university event to which external guests will be invited. Events are an important component of the university’s outreach efforts and must be conducted in a way that represents UNC Charlotte in a first-class manner. Therefore, if you do not have the funding to deliver a quality event, consider either hosting a smaller, more intimate event or not hosting the event at all.

## **Guidelines for University Events:**

1. **Invitation and Save the Date:** When appropriate, send a save the date 6-8 weeks prior to the event. Typically this is done for events that have a large external audience. Invitations should be sent 4-6 weeks prior to the event. Whether you are sending an electronic or printed

invitation, always identify *who, what, when, where, and why*. [Click here](#) for a sample invite.

2. **Directions and Parking:** Guests should be provided clear driving directions (and preferably maps) to the specific location of the event and the most convenient parking. Work with Parking and Transportation Services to determine an appropriate parking plan for your event.
3. **Event venues:** Consideration should be given to the size of audience anticipated to avoid having a room either too large or too small for the event. Six square feet per person is typically allotted for a standing reception. Spaces need to be well-ventilated and air conditioned. Avoid holding events in small conference rooms, hallways, etc
4. **Nametags:** Should be pre-printed in a sufficiently large and bolded font (36 pt. or larger) to be read from some distance away. Nametags should be placed on the right side lapel of guests to facilitate reading when shaking hands. Avoid peel and stick nametags whenever possible. Nametags should also be worn by wait staff and employees assisting with the event.
5. **Receptions:** Generally, pre-program receptions should not exceed 45 minutes. The entire event should not last longer than two hours.
6. **Program:** If a speaking program is planned during a reception or other event, it is important for invitations to separately list the time of the program (e.g., if an event is from 7 p.m. to 9 p.m. but the formal program will not start until 7:30 p.m., list both times on the invitation).
7. **Program Length:** If guests are standing, a program should not exceed 30 minutes.
8. **Lighting:** Room lighting should be adjusted or dimmed to encourage a more intimate atmosphere. Darkness is not necessary, but neither should every light in the room be fully illuminated.
9. **Staging:** If a stage is required, it should be proportionate to the room and appropriate for the need. In small gatherings, a podium may be sufficient.
10. **Audio:** Depending upon the program to be delivered and the size of the room, audio amplification may or may not be needed. Audio equipment should be tested prior to the event. A technician should be on hand for large events (over 200 guests).
11. **Bar Service:** A sufficient number of bar stations and bartenders should be provided to reduce waiting times. Bar locations should be well distributed to encourage distribution of guests to multiple stations. Do not place a bar station near the entrance to the event to avoid having a

crowd form at that location. Consider pre-pouring wine in glasses that guests can pick up without standing in line. A good formula for estimating alcohol consumption is one drink per hour per person—2 hour reception x 100 people = 200 drinks. This is not an absolute formula and can change depending on the time of day and type of event. It is always best to purchase more than you need and return the leftovers after the event. ([Link to alcohol forms on Legal Affairs site](#))

12. **Food Service:** Buffet lines should, whenever possible, be “two-sided” to let guests obtain their food without waiting in long lines. A sufficient number of buffet stations should also be considered to distribute guests to different places in the venue.
13. **Reception Food Choices:** Bite-sized hors d’oeuvres are often a good choice, whether passed or available at a food station. Food options that appeal to a variety of people are also strongly recommended, i.e. red meat, poultry, seafood, and vegetarian options.
14. **Silverware and Glassware:** Wherever possible, avoid plastic utensils, glasses, and flatware. Glass is always the preferred choice.
15. **Photography:** Some events may call for a photographer to memorialize special awards and recognition of special guests. Creating a shot list ahead of time will ensure that the proper photos are taken. (i.e., a photo of a faculty retiree with family members or the recognition of a major donor by the dean of the college). Posed photos work best for commemorating these types of events. Particularly good photos should be shared with donors or special guests after the event. A hand-written note to accompany the photo(s) is a nice touch.

## Resource Links (These will link to the correct form, website, or contact.)

- 🔗 [Chartwells](#)
- 🔗 [Facility Rentals](#)
- 🔗 [Conferences Services \(Audio Visual\)](#)
- 🔗 [Photography/Videography](#)
- 🔗 [Parking and Directions](#)
- 🔗 [Marketing \(Branding Guidelines\)](#)
- 🔗 [Campus Police](#)
- 🔗 [Alcohol Forms \(Legal Affairs site\)](#)
- 🔗 [Office of Events and Special Projects](#)

## Event Checklist and Timeline

Four to five months before the event

Activity	Person Responsible	Due Date
Choose and set the date making sure it agrees with key attendees' calendars. Avoid religious and other holidays		
Initiate event planning and establish responsibilities		
Reserve date on key attendees' calendars		
Determine and reserve venue		
Determine funding and budget sources		
Contact <a href="#"><u>The Office of the Chancellor</u></a> if you would like him to participate		

### Three to four months before the event

Initiate program discussion		
Determine guest list and create database		
Design save-the-date cards (If applicable)		
Determine need for memento		
Create invitations / RSVP cards; Obtain approvals		
Reserve parking for VIPS and establish plan for VIP seating at event		
Block hotel rooms for out-of-town guests		

### Two to three months before the event

Confirm speakers and find out about presentation needs		
Develop draft of program		
Determine precise area at venue for stage and seating		
Determine event signage requirements (pedestrian & vehicle)		
Determine onsite registration procedures including ushers		
Book event with caterer & establish preliminary menu and budget		
Contact Transportation for parking assistance		
Contact Campus Police for safety and security review		
Contact a company for bus and car transportation		
Contact vendors as required for:		
Tent, stage, podium, chairs, tables		
Electronics such as sound system, lighting, LCD projector, DVD, laptop		
Flowers, plants, balloons, other decorations		
Memento(s)		
Mail save-the-date cards		
Begin design of memento(s)		

### Six weeks before the event

If alcohol is being served, request necessary campus approvals and complete forms <a href="#">Link to alcohol forms.</a>		
Place order for invitations and RSVP six to eight weeks prior to the event		
Send invitations		
Order memento(s)		

## Four weeks before the event

Approve final program		
Draft script or talking points for speakers		
Work with University Communications on copy for internal and external press releases		
Meet with vendors on site		
Consider site preparation (special cleaning, equipment, and trash removal) (Contact Facilities Management for assistance)		
Prepare event signage		

## Two weeks before the event

Review planning group and staffing assignments for day of event		
Meet on site with operational staff such as transportation officials and ushers to discuss responsibilities		
Meet with caterer on site to discuss setup and final menu		

## One week before the event

Send caterer final count (catering deadlines may vary)		
Print programs, name badges, and seating cards		
Confirm arrangements with vendors		

## 24 hours before the event

Contact caterer to verify all arrangements		
Confirm security requirements		
Ensure tent, chairs, tables, stage, podium are in place		

## Day of the event

Check location setup to include chairs, tables, podium, food		
Arrange printed material, nametags, mementos, etc. on registration table		
Check sound and lighting equipment with vendor(s)		
Ensure space and hook-ups are available for media		
Ensure decorations are in place		
Place water at podium		

## One to five days after the event

Write thank you notes and send photos to important guests. Also send thank you notes to speakers, volunteers, staff, and others as appropriate		
Complete written evaluation of the event with suggestions for future events		
Coordinate event story and photographs with University Communications		

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