• **Strategy**
  - What is this event trying to accomplish?
  - Who are you trying to target?
  - How does it fit into the strategic plan for your department/college?

• **Date, time, location of event**
  - What is the date of the event? Suggested Location?
  - What time best suits an event of this nature?
  - How does traffic and workday travel affect the date and timing of this event?
  - Is the event close to any holidays or 3 day weekends?

• **Size of event**
  - What is the ideal number for optimum guest experience and to achieve UW goals?
  - What is the physical capacity of space, amount of available seating, reception area, and comfort of hosts? (if event is held in a private home)

• **Budget and Timeline**
  - Who determines budget? Who approves?
  - Who will perform logistical arrangements (i.e. catering, rentals, valet, etc.)?
    Note: Typically if the UW is paying full costs, the UW will make all catering arrangements.
  - Who will create an event timeline and assign tasks and responsibilities?

• **Guest List**
  - What criteria will be used to determine invitation list?
  - Who pulls data from Advance?
  - Is it an all-call, or a private donor event (involvement of Alumni group, or more strategic)

• **Invitations / Hold the Date / RSVP**
  - What is design concept in terms of shape, size, fold/no-fold, envelope/self-mailer, etc.?
  - What visual elements, imagery, logos, or color schemes do you want to use?
  - When do we want the invitation to mail? What timeline does that deadline dictate for other decisions and actions?
  - Who is the contact for the RSVP? Cvent, Catalyst, email or phone?
  - Is there a web link / landing page?
  - Are directions included? (travel and parking) or sent as a follow up to RSVP?

• **Catering / Food & Beverage**
  - Determine menu concept (light or heavy appetizers? Meal served?)
  - Any special themes relevant to the program?
  - What items can the host provide and what items should the caterer bring including tableware and glassware, flowers, tables, chairs or linens etc.?
  - Does host or venue have a preferred caterer? Is that caterer required or simply preferred? Are other suggestions available in order to get comparison proposals?
  - Can caterer provide beer and wine? If not, how will that be procured? Can host help with that process? Signature beverage?
• Physical set-up
  o Where will reception be? Where will program be?
  o Indoor or outdoor event? If outdoor, is there a rain plan? Is tenting allowed? Do you need a tent permit?
  o Is there enough seating for program and/or dinner?
  o Will all guests be able to hear in this set-up or is a small sound system required?
  o Podium, microphone or riser?
  o Where will catering be staged and served?
  o Is there room for check-in table near entrance?
  o Coat check needed? Where will it be? Is it self-serve?
  o Are there any physical challenges presented by the space or the layout (steep hills, sight lines for talk, etc.)?
  o Do you need to arrange for custodial services or grounds keeping prior to the event?

• Décor & Signage
  o Will linens be required?
  o Is any special signage required for the event? (Banners, welcome signage, podium signs, branding)
  o Are there needs for décor or special items like balloons or flags? UW décor? Flowers?
  o Are there any decor restrictions?

• Sound / Music / AV
  o Is house/venue sound system adequate?
  o Is there ambient music? Who brings? Live music? Trio, piano, etc.
  o Any AV for presentation? (Laptop & adaptors, projector, extension cords and covers, screen?)
  o Who will run AV – in house, staff or hire out professionals?

• Parking/Directional Signage/Security
  o Is there sufficient parking space on property or around home for self-parking?
  o Is there a need for disability parking?
  o Is there ample parking for catering, AV vehicles etc. to load in and out and park?
  o Is a valet required due to insufficient space or other physical challenges presented by the setting?
  o Is there any signage needed in the area to denote event? At the house?
  o Is any security needed during the event?

• Permits
  o What permits are required for the service of alcoholic beverages
  o Do you need a UUF?
  o Do you need a non-UW catering food form?
  o Do you need a tent permit? (dependent on size of tent and number of guests attending)

• Photography/Media/Publicity
  o Photographer for the event if necessary?
  o Shot list, locations and time for anything formal or staged for publicity
  o Lighting or other setup requirements. Walk-thru prior to event.
• **Registration / Welcome / Staffing**
  - Table, linen, branding needed? Location of check in/greeting?
  - Who has guest list?
  - Name tags? Blanks for on-site?
  - Any guest giveaways with arrival packet?
  - UW promo pieces available? Who brings?
  - How many staff needed for check in, welcome?
  - Volunteers needed? Training required? Meal provided and thank you token
  - Students in attendance to engage guests?

• **Program and Briefing Packet / Itinerary (2 weeks advance)**
  - Who does briefing packet? Itinerary? Strategic notes?
  - Who creates the evening program outline and is there a need for a print program?
  - Will you need a gift for the host? Host or President’s role: welcome, introductions, wrap-up
  - Ideas about good speakers and topics for this event
  - Length and style of program

• **Follow – up Post Event**
  - Thank yous
  - Letters to strategic guests: send notes to Kathy Burke to help with personal notes from the President and things that happened during the event. Also cc her on briefing packet.
  - Wrap Report: Successes need to improve, final guest count, budget, etc.
  - Possible survey sent to guests