



Event Planning Guidelines

Keep in mind that the guidelines for in person events were developed before the pandemic and planners should follow guidance of [campus officials and rules on gatherings](#).

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, please take into consideration your budget prior to planning your event. If you do not have the funding to deliver a quality event, consider hosting a smaller, more intimate event or hosting a virtual event.

Guidelines for in-person 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*. [See this sample invitation](#).
2. **Directions and Parking:** Guests should be provided the address to the specific location of the event and clear parking instructions. Work with [Parking and Transportation Services](#) to determine an appropriate parking plan for your event. If it is within your budget, provide your guests with parking vouchers when having them in paid parking locations.
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 traditionally 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. Avoid peel and stick nametags

whenever possible. Nametags should also be worn by all staff 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 or experienced staff member should be on hand for the event to provide technical support.
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.

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.

Please visit the [Office of Legal Affairs website](#) for the University's policy on Alcohol Beverages.

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. Foods that appeal to a variety of people are also strongly recommended, i.e. red meat, poultry, seafood, vegetarian and gluten free options. Make sure your food items are labeled properly using a small tent card. 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). 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.

Guidelines for Virtual University Events:

- **Invitation and Save the Date:** For virtual events, it is appropriate to send an email invitation three to four weeks prior to the event. A save the date is not required. Hard copy invitations are only necessary for those you do not have an email address for; however, the guest will need an email address to receive the virtual link. Make sure to collect that information in the RSVP. Again, whether you are sending an electronic or printed invitation, always identify *who*, *what*, *when*, *where*, and *why*. [See this sample invitation.](#)

- **Virtual Platform:** Zoom is an available platform for UNC Charlotte events. [AISLE](#) is a group on campus that can assist you with Zoom prior to and during the event. Depending on the comfortability with the technology, you may want to consider having a rehearsal at least one week prior to the event with the AISLE tech and any program participants that have a big role in your event.

- **Audience Engagement:** Since you are losing a big part of what in person events are for – human interaction – it is very important to make sure your guests do not feel lost behind a screen. Here are some good examples to keep your audience engaged.
 - Keep the chat open for the audience to send messages to each other or to the panelists (program participants).
 - Q&A through the chat feature. These questions should go to panelists only so that they are the ones to give an answer. If the group is small, the audience can use the “hand raise” feature and ask their question live

through their camera/microphone.

- Send a gift prior to the event. This gift can be a gift card to get lunch/dinner to enjoy during the event or a small tangible gift that has to do with the program (i.e. a book written and signed by the guest speaker)
 - Host your event with the capabilities for participants to have their cameras on to better engage with each other.
- **Pre-Event Communication:** It is appropriate to send the virtual link one day prior to the event. With the link you should remind them of the date and time of the event along with any other information they may need for your specific event. Also include a contact for the AISLE tech just in case any of the guests has issues logging on.

Resource Links

- [9201 Catering](#)
- [Facility Rentals](#)
- [Conferences Services \(Audio Visual\)](#)
- [Photography/Videography](#)
- [Parking and Directions](#)
- [Marketing \(Branding Guidelines\)](#)
- [Campus Police](#)
- [Alcohol Forms](#)
- [Office of University Events](#)
- [AISLE](#)

In-person Event Checklist and Timeline

Four to five months before the event

Activity	Person Responsible	Due Date
Discuss your audience and goals to decide on format for the event		
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 the Office of the Chancellor if you would like her to participate		

Three to four months before the event

Initiate program discussion		
Determine guest list and create mailing list		
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 (if applicable)		

Two to three months before the event

Confirm speakers and find out about presentation needs		
Develop draft of run of show		
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 or email (if applicable)		
Begin design of memento(s)		

Six weeks before the event

If alcohol is being served, request necessary campus approvals and complete forms .		
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		
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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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Virtual Event Checklist and Timeline

Three months before the event

Activity	Person Responsible	Due Date
Discuss your audience and goals to decide on a format and platform for the event		
Choose platform		
Select a date and confirm with program participants		
Contact the Office of the Chancellor if you would like her to participate		
Add to the appropriate calendar(s)		
Determine need for memento		

Two months before the event

Determine guest list and create mailing list		
Design invitation – decide what is needed (hard copy invite vs. email invite, reply card)		
Get all approvals needed on the design and verbiage of the invitation		
Create registration site/link		
Draft run of show		
Design program (if applicable) – can share via PDF since event is virtual		
Begin design of memento(s)		

Four to five weeks before the event

Place order for invitations five weeks prior to the event		
Send invitations (hard copy, email or both) – make sure to test email invitations before sending to guests.		
Order memento(s) (if applicable)		
Approve final program		
Draft script or talking points for speakers – determine if you need slides shown.		
Work with University Communications on copy for internal and external press releases		

One week before the event

<p>Hold a rehearsal with key program participants on the platform you are using.</p> <ul style="list-style-type: none"> • Go through run of show • Confirm if attendees will be on camera or not. (Webinar vs Meeting) • Discuss if you will be using the chat feature and how • Discuss any other ways you will be keeping the audience engaged • Requests any items needed: backdrop, microphone, lighting, camera, etc. 		
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Mail memento(s) if you want attendees to have the before the event date.		
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24 hours before the event

Send a detailed email to all registered attendees with the event link and a link to the PDF program (if applicable)		
Make sure AISLE (or whoever is running your virtual event) has the final script, run of show, and/or any slides and videos that need to be shown.		

Day of the event

Have all participants enter the virtual event for a pre-event check in to run through the program one last time and answer any last minute questions.		
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One to five days after the event

Email survey to attendees		
Email event recording to attendees and those that couldn't attend (if applicable)		
Upload recording to YouTube/website (if applicable)		
Send thank you to any speakers/staff assisting		
Send memento(s) if haven't already done so		