These Event Management guidelines are designed to assist you with your event planning. These comprehensive guidelines will assist you on how to develop and implement meeting and meal functions.

In an effort to maintain a standard level of quality for our entire community, you are encouraged to use these guidelines. Whether you are planning a luncheon for 10 people, a conference for 100, or a dinner for 400, these guidelines should address your concerns. Of course, not all events follow the same pattern, so there is room for flexibility in the procedures outlined in the following pages.
Event Planning Checklist

Preliminary Logistics (Contact Allie Dubose for Academic Building, Claudia Burkart for Faculty Lounge or Bonnie Signore for Pitt Center or Joe Belezney for the Schine Auditorium)

Event date: ______________________ Start/end times: ______________________
Location: ______________________ Estimated attendance: __________________
(Room, date reserved and confirmed)

Billing/charge to account number:__________________________________________

Requested by: ____________________________________________________________
(Name, department, phone number)

Type of event: ____________________________________________________________
(Brief summary, attach agenda with specific timing for program)

Media relations: ___________________________________________________________
(Date, who was contacted)

University calendar: _______________________________________________________
(Date of Submission)

Other Event Logistics*

Room Arrangements (develop a room diagram)
 __ Conference
 __ Herringbone
 __ Hollow Square
 __ Lecture
 __ Perimeter seating
 __ Rounds of 6, 8, 10
 __ Schoolroom
 __ U-shaped

Equipment Needs (contact Cynthia Conte/Events Set-Up)
 __ Head table
 __ Lectern
 __ Riser
 __ Ropes or stanchions
 __ Tent
 __ Permit
 __ Dimensions
 __ Lighting, Flooring
<table>
<thead>
<tr>
<th><strong>Lecture or Theater</strong></th>
<th>Chairs set up in rows, with aisles, facing the head table, stage or speaker</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Schoolroom</strong></td>
<td>Rows of tables and chairs arranged in rows with a center aisle, facing the head table, stage or speaker</td>
</tr>
<tr>
<td><strong>Conference</strong></td>
<td>Tables arranged in a closed rectangle with chairs set up around the perimeter</td>
</tr>
<tr>
<td><strong>U-Shaped</strong></td>
<td>Tables set up in the shape of the block letter U, with chairs set up on the perimeter</td>
</tr>
<tr>
<td><strong>Herringbone</strong></td>
<td>Rows of tables and chairs arranged at an angle with a center stage</td>
</tr>
<tr>
<td><strong>Reception Style</strong></td>
<td>Usually standing room only with scattered chairs and cocktail tables</td>
</tr>
<tr>
<td><strong>Hollow Square</strong></td>
<td>Tables arranged in a square with the center being hollow chairs set up around the perimeter</td>
</tr>
<tr>
<td><strong>Perimeter seating</strong></td>
<td>Chairs set up around the perimeter of the room</td>
</tr>
</tbody>
</table>
**Other Equipment Requests**

- Blackboard
- Coat rack or coat check
- Easel
- Flip chart
- Literature table
- Message board
- Notepads and pencils
- Pointer
- Registration table & chair
- Telephone

Other: ___________________________

**Audio-Visual Requirements**

(Contact Joe Sokoloski/Audio Visual)

Other: ___________________________

**Invitations, Letters, Programs**

- Invitation list (A&B)
- Speakers
- Panelists
- VIPs
- Overnight accommodations
- Travel accommodations

Other: ___________________________

**Media Relations and Publicity**

(Contact Deborah Noack)

- Advertising
- On-campus publications
- Off-campus publications
- Photography
- Press release
- Press room
- Radio
- Television

**Invitations, Letters, Program**

(Contact Deb Chute)

- Invitations, reply cards, envelopes
  - design
  - printing
  - calligraphy
  - labels
  - postage
  - rsvp contact

- Program
  - design, print, distribute at event

Other: ___________________________

**Notes:**

________________________________________________________________________
Possible Additional Printed Item Needs

__ Escort cards & place cards
Other: ____________________________
(one sided for small groups; two-sided for large groups)
__ Flyers & posters
__ Maps
__ Nametags
__ Tent cards
__ Tickets
__ Menu cards
__ Seating chart

Food & Beverage Requirements
(Contact Chartwells Dining Service)

__ Type of meal __ Beverages
-coffee break -alcohol permit
-breakfast -bartender
-lunch -water at podium or head table
-reception __ Linen request
__ Guarantee date: _____________

__ Service (waitstaff, servers)
-buffet Other: _______________________
-preset
-served

Décor and Signage

__ Balloons __ Flowers
__ Banners -table arrangement
__ Candles -corsages, boutonnieres
__ Directional signs __ Plants
__ Flags __ Lectern sign with SHU logo
Other: ____________________________
__ Lighting

Notes:___________________________________________________________________________
___________________________________________________________________________

Housekeeping
(Contact Campus Operations with event time and location)

__ Trash & Recycling cans __ Windows
__ Meeting & restrooms __ Hallways to meeting room
__ Grounds __ Carpet

Transportation/Parking/Security Needs
(Contact Michael Moylan)

__ Buses Entertainment
__ Live music
__ Vans
__ Valet
__ Parking
__ Security
__ First-aid station
Other: ______________________

Recognition or Gift Items
__ Awards, certificates, plaques, trophies
__ Merchandise
__ Framing
__ Calligraphy
__ Engraving
__ Shipping
Other: ______________________

Special Needs Requests
__ Interpreter
__ Braille, audio-recording, large print
__ Wheelchair access
__ Dietary restrictions
__ Registration form or other literature
__ Assign staff to assist individual
Other: ______________________

Notes: ________________________________________________________________

Staff Briefing Talking Points
__ Event agenda or program
__ Date and location of event
__ Food and beverages requirements
__ Seating chart
__ Speaker biography
__ Staff duties
__ Directions to event
Other: ______________________

Ushers/Greeters/Doorman
__ Location
__ Number
Other: ______________________

Post-Event Correspondence
__ Thank you letters
__ Evaluation forms

Files
__ Correspondence
__ Bills
Getting Started

Whether you are planning a meeting or meal function, there are a number of issues to address that are common to all events. The Event Planning Checklist is a handy tool to use when planning your event. It includes such topics as invitations, catering, décor, entertainment and more. It should be used as a general guide to assist you with event planning. There are unique features to all events that may not be covered in the Event Planning Checklist, so it is important to document your events. This documentation will provide you with valuable resources for future event planning.

Protocol

Flag Etiquette

- When flags of countries, states, cities or organizations are displayed from separate staffs, the flag of the United States should be placed in the honor position to the right of the other flags as observed while standing directly behind a lectern facing an assembly.

- When a flag is used in conjunction with the U.S flag, it should be placed to the left of the U.S flag as observed while standing directly behind a lectern facing an assembly.

- When flags are displayed flat, they should be displayed above and behind the speaker.

- If the U.S flag is displayed with other national flags, the display should be arranged alphabetically after the placement of the U.S. flag.

Precedence

Precedence, based on one’s official position, should be the determining factor for seating arrangements for all official functions. The same is true when seating officers and guests of a public or private organization at meetings, banquets and other formal functions. Not to recognize the status of an individual through proper protocol planning can have a negative effect on the success of your event. While this is most obvious with political figures, the same principles of protocol apply to business, religious and community figures.

Always review your guest list and assign an order of precedence to each person. The basic premise of determining precedent is to look at the highest ranking position and
work down to the lowest level. An organizational chart may come in handy when developing this list. When dealing with those in political office, refer to the precedence list used by the State Department (www.state.gov/aboutstatedepartment). If there is more than one individual at a particular level, then relative status is determined by length of time in office.

**Use of the Logo, Mark and Seal**

Events held on or off campus, reflect the image of the University to the community and the public at large. Therefore, the logo, mark or seal should be displayed properly at all events. The logo or mark may be in the form of a lectern sign, an easel sign, a flag or banner, nametag, or literature distributed at your event. It should be clear to all participants that your event is affiliated with. Therefore, proper signage should be present at all events.

The use of the seal is restricted to authenticating the highest official University documents, such as diplomas and legal documents. The seal may be used as a lectern sign at commencement ceremonies only. It may be used on other materials at the discretion of the President or Board of Trustees.

The following flags, banners, signs and artwork are available for use at your event:

- U.S., UN flag
- Connecticut flag
- IFCU flag
- University flag
- College/School flags
- Banners
- Camera-ready artwork

**Speakers, Panelists, VIPs**

If you have a speaker, panelist or VIP participating in your event, consider the following steps to ensure that your participants are clear on their role in your event.

- Confirm by phone the date and time of the event with the speaker’s scheduler. Follow up with a confirmation letter. Be
sure to reconfirm details with the scheduler the day before your event.

✓ Obtain biographical information on your speaker to be used in your event program or other literature.

✓ Provide your speakers with a clear, detailed agenda for your event, highlighting their portion of the program.

✓ Ask your speaker if he or she has any audio-visual requirements or other needs to ensure the success of their presentation.

✓ Provide your speaker with pertinent information regarding the University, such as directions and parking information.

✓ Determine if staff members, spouse, or other guests will accompany the speaker to your event and, if so, where they will meet the speaker.

✓ Determine if your speaker has any special needs, such as dietary restrictions or physical handicaps, and address these issues properly.

✓ Consider whether the person is a dignitary of such stature that the President or another University officer should greet or formally introduce him or her. If so, contact the Office of the President well in advance of the event.

If you are expecting a foreign dignitary, government official, or other public figure, find out if he or she will be accompanied by security personnel. Offer to arrange a tour of the function space with the advance staff or your guest and the Office of Public Safety. You will want to discuss arrival and departure needs, as well as security needs while in the function space.

Position of Honor and Seating

It is important to consider position of honor throughout the planning of your event. The most important rule to remember is that the host or hostess is always front and center. The most important guest is always to the right of the host or hostess, the second most important guest to the left of the host or hostess, and so on. Alternation right and left throughout your guest list.
At a meal function, the place of honor for a male guest is to the right of the hostess. The man next in honor sits on the left of the hostess. The place of honor for a female guest is to the right of the host when the next female guest to the left of the host. When possible, avoid seating two men or two women next to each other. Also, avoid seating spouses next to one another or at the same table.

When planning table assignments, keep in mind that guests should be seated appropriately to afford interesting and profitable association for all concerned. VIPs should always be seated at the head table or tables with the host or hostess. Guests not seated at the head table should be placed so that the most important guests are closest to the head table. The position of honor at each table, also known as the host or head table, should be seated with the optimal view of the lectern or stage where the program will take place.

At a meeting or conference, seating is often determined by the program and table configuration. The host or chairperson can be seated at the head of the table (British Style) or in the center of the long side of the table (French Style). The guests should be alternated right and left around the table as mentioned above.

If your event includes a dais with your participants seated facing the assembly, the highest ranking participant is seated to the right of the host, which could include the president, dean or individual chairing the event. There are a variety of seating configurations for meetings and conferences, and seating assignments may be determined on an event-by-event basis.

**Speaking**

In most cases, the host of an event should be the first to speak, followed by the highest ranking official on down the scale in ranking official.

**Receiving Lines**

If a host, guest of honor, and spouses are in a receiving line at an event, there are two options for setting up the receiving line:

<table>
<thead>
<tr>
<th>Option #1</th>
<th>Option #2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host</td>
<td>Host</td>
</tr>
<tr>
<td>Guest of Honor</td>
<td>Guest of Honor</td>
</tr>
<tr>
<td>Hostess</td>
<td>Spouse of Guest of Honor</td>
</tr>
<tr>
<td>Spouse of the Guest of Honor</td>
<td>Hostess</td>
</tr>
</tbody>
</table>
Forms of Address

It is important to consider varying titles if you are composing a letter, sending an invitation, or creating an address for government and non-government individuals. You can find the proper forms of address for officials and degreed professionals online or in the Business Desk Reference.

Special Arrangements

“Reasonable accommodations,” as mandated by the Americans with Disabilities Act (www.ada.gov), are modifications which allow qualified individuals with disabilities to participate fully in your program.

Specific accommodations will depend on the needs and abilities of the individual participant. Thus, it is necessary to determine how an individual’s disability will affect his or her participation. The following steps will facilitate this process.

1. Identify a member of the group sponsoring the event to act as a liaison to individuals with disabilities and to Public Safety.
2. Place the following statement on all invitations and advertisements for your event: “To request accommodations for persons with disabilities, call (203-department number at SHU sponsoring event) at least 72 hours in advance.”
3. When you receive calls, it will be helpful to inform the caller about the event including the format, types of materials to be used, meals, locations, etc. Based on that information, he or she can inform you whether accommodations will be needed to participate in those activities.

Accommodations could include the following:

Persons with mobility disabilities
   Wheelchair accessible facilities, information about parking on campus (campus maps should contain this information).

Persons with visual disabilities
   Reserved seats close to the presenter (and adequate room lighting), print materials provided in alternative formats including Braille, audio, large print.

Persons with medical disabilities
   Specific meals, additional meals for personal attendants, well-ventilated rooms.

Persons with hearing disabilities
   Sign interpreters (and adequate room lighting), amplifying the presenter, reserved seats close to the presenter.