



The  
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# The Event Organiser's Checklist.

# The Event Organiser's Checklist

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# Preparing for success

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The sort of events we're mainly concerned with are ones with a target audience that's entirely or partly external, and are often of significant importance to the University as a whole. Their purposes may include:

- Raising the profile of the University and its brand
- Publicising major new initiatives and facilities
- Cultivating potential clients/alumni/students
- Building and strengthening relations with the city and community
- Influencing and informing opinion leaders

If you're called on to organise such an event, but you're not an experienced events manager, where can you turn for guidance?

That's where the Events Team within the Development, Alumni Relations and Events Office comes in. We're unable to organise your entire event for you, as we unfortunately don't have the staff resources. However, we can provide advice, and point you in the direction of specialist skills and facilities you may need.

The best event managers are people with an eye for detail and a talent for project management, prepared to go to great lengths to get all the small but important details absolutely right.

We hope the following events checklists will give you some useful pointers to making a success of your own event. If you'd like more advice, please contact us and we'll do our best to help.

[www.sheffield.ac.uk/eventsteam](http://www.sheffield.ac.uk/eventsteam)

## Using the checklists

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A few examples of types of events include:

- Celebrity guest lectures
- Building/facility openings
- Visits by public figures
- Project launches
- Networking events for clients or supporters
- Exhibitions
- Any event that will attract news media attention as well as an audience

To keep this pack concise and easy to use, we haven't complicated matters by differentiating among different kinds of events, so in the checklists that follow, you'll see that not every point is applicable to every type of event. Which points are relevant to your own event should be pretty obvious in most cases.

There are no hard and fast rules on *exactly* how to organise any given type of event, and a lot of the decisions you'll need to make on what and what not to do are down to common sense. For example, if you plan to make follow up contact with guests you'll need to maintain an extremely accurate record of who was invited, who accepted and who actually attended (not all the same thing as accepting the invitation). However, if sheer numbers are more important than contact details, you can just count how many people turn up.

Any suggestions you may have for additions or amendments to these checklists to make them more useful will of course be very welcome.

# Before you start

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- Assemble a steering group of the key people who will make the event happen
- Set your objectives - what do you want the event to achieve, and why?
- Decide how you will measure the event's success
- Define your target audience and decide on target number of attendees
- Identify a venue and check its capacity
- Identify the best date and time to attract the desired audience
- Check the availability of key VIPs if appropriate
- Define the opportunities and benefits the event will offer your audience - this will shape the event and decide what you say in the invitation/publicity
- Decide on channels of communication with audience - eg invitation letter, leaflet mailing, advertising, media publicity etc
- Cost the event as accurately as possible, fix a budget and identify the budget holder. Make sure you include everything - venue hire, catering, postage, venue dressing, audio visual equipment hire, transport, technicians, portering services etc
- Now is the time to ask yourself, are the potential benefits worth the cost and time involved? If not, think again
- Set the date
- Set the admission charge, if any. In some cases a free event lacks perceived value, and a charge may actually draw a larger audience. If the event is free more invitees are likely to accept but fail to turn up
- Draw up a detailed project plan and timeline with clear deadlines, working backwards from the date of the event and including any post-event guest follow-up activity that will be needed
- As part of the plan, allocate responsibilities for the key tasks and make sure that everyone involved is clear about what they must achieve, and by when

# Inviting the audience

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- Draw up the guest list. A-list (most valuable guests) and B-list categories
- Send out invitations at least six weeks ahead of event - expect c. 40% acceptance *if you get everything else right*
- Consider personal phone approaches ahead of the official invitation to A-list invitees – the people you really, really want to be there
- If it's a public event, book the advertising, or order the direct mail shot, and notify press what's on columns in good time
- Draft the invitation - be very concise, focusing on the event's attractions, opportunities and benefits for guests. Double and triple check everything before it goes out – spelling, grammar, dates, times, names and titles, admission charges if any, phone numbers, correct protocol
- Include an easy response mechanism (eg. a fax back form, a web form, or email address), with deadline for reply at least two weeks ahead of event to allow time for phone chasing
- Ensure that the response form allows guests to specify any disability, special dietary requirements, spouses/partners they wish to bring etc. Check it just as carefully as the invitation itself
- Monitor responses and keep a meticulous record of acceptances/declines

- Depending on the nature of the event it may be advisable to follow up acceptances with a courteous letter thanking for acceptance and including dress code if any, directions to venue, parking details, programme information etc. Try to predict any question a guest is likely to ask, and answer it before they have to. But don't be surprised if a few ring up with simple questions to which they would know the answers if they had read the invitation. This is normal!
- Notify final numbers for catering by the deadline agreed with the caterers
- For networking or VIP events (eg openings by royalty), prepare good quality name badges (refer to The Event Organiser's Catalogue), with print large enough to read easily. Carefully check the names and titles again
- Be prepared for "no shows" at the event, and to record these as well as the attendances – useful information for post-event evaluation and for follow-up communications

## The venue

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- Book the venue, allowing plenty of set-up and audio visual testing time before the event and dismantling time afterwards
- Book a 'green room' for VIPs if necessary
- Decide how the venue needs to be prepared and dressed – determine the staging style and seating style (eg theatre or round tables). Make sure the necessary furniture, screens, temporary staging, table coverings etc will be available
- Order any plants required for dressing the venue
- If it's a University venue, order any repairs or making-good to décor needed to make the venue and its approaches presentable
- Take into account safety issues such as fire exits, safety of floor-laid cables, handrails, disabled access etc
- Organise a professionally designed backdrop for the speaker, incorporating the University's name and corporate identity – in pictures and on television this may be the only thing that shows our association with the event
- Plan the reception desk and arrangements, where required. Organise enough reception points and staff to avoid queues
- Plan the food and drink servery arrangements, ensuring that there will be enough space and enough serving staff on duty to avoid queues and delays to the event
- Allocate space and ancillaries for any displays – size, position, lighting, power etc – and ensure the necessary equipment is booked, and will be delivered and erected in good time
- Organise the guest cloakroom, with attendants if necessary
- Walk the access route and have whatever direction signage is necessary professionally prepared

## Booking other components

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- Book the speaker(s) and make sure you have written confirmation, plus (this is vital!) a plan B if the star speaker backs out or is ill
- Double check that the event is in the diaries of all University key players
- Order any printed publicity as soon as the programme is confirmed – having first checked and rechecked the copy, using at least three pairs of eyes familiar with the event, looking for errors and typos

- Book the catering appropriate to the timing, nature and scale of the event
- Book all necessary audio visual equipment in good time, together with a technician if required. Also remember to order hearing loops should the venue require them in case any of the attendees are hard of hearing
- Book and fully brief the photographer, explaining what shots are required in what format for what end uses
- Book the necessary parking spaces
- If appropriate, identify car/coach drop-off points and make sure they will be kept unobstructed on the day
- Book any necessary security and portering staffing
- Order the plaque if the event is an opening ceremony – having checked and rechecked the wording and spelling
- In case the weather is wet, obtain golf umbrellas to keep VIP guests dry going to and from the venue
- Book all necessary accommodation for attendees
- Notify the media team of your event in case there are any opportunities of raising its profile through the press. Not all events generate media stories but it is worth checking

## Speakers and VIPs

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- Ensure that the speaker is fully briefed in writing and understands exactly what is required. Specify the target audience for the event, the style of the event, the dress code, the type of venue and staging, the audio visual facilities provided, the length of presentation required and the theme and approach required
- Any speaker fees and/or expenses should be agreed, in writing, in advance
- Organise any necessary transport and accommodation, and inform the speaker/guest or his or her secretary
- Allocate a designated representative to look after each speaker/guest of honour and ensure that the guest is met on arrival and escorted to meet his or her host
- Designate an event master of ceremonies, and make sure that he or she knows exactly what everyone is supposed to do, and when
- Ensure that whoever is introducing the speaker is fully briefed about the speaker and his or her theme
- All movements on stage (to and from the lectern etc) should be carefully planned and choreographed. If possible hold a rehearsal for everyone taking part to walk them through the moves and check timings
- For formal events it is advisable to prepare briefing notes specific to the role of each key player, to send them out about a week before the event, and to check that each has read and understood them
- In the case of formal events or those at which a guest with ceremonial responsibilities is to be present (eg royalty, overseas diplomats and politicians etc), all University staff involved “front of house” should be briefed in matters of protocol – how to address and behave to the VIP guests.
- For formal events introduction lines (to greet the guest or guests of honour) may be required. Protocol relating to the order and nature of introductions can be a sensitive matter, so again it is best to take advice in such cases

# On the day

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- Identify an event team leader, who will be responsible for troubleshooting, briefing stewards and checking that all participants are in the right place at the right time, and know what they are supposed to do
- Make sure that staff stewards are stationed at all the key points in the venue where arriving guests might need directions
- Determine whether a dress code for stewards is appropriate for your event and if so ensure that everyone is informed in advance
- In the case of formal events, make it clear (tactfully) to all University participants, however senior, that during the event they must do exactly what the team leader tells them to, not what they please
- Have a communications system, walkie-talkie or mobile phone, that enables all members of the event team to contact each other and other key participants such as drivers and VIP hosts
- At timetabled events, develop a clearly understood signalling system for communicating with speakers and session chairs, to ensure that the event keeps to its planned timings
- Assemble an emergency repairs box including items such as scissors, stapler, staple gun (both filled with staples), Velcro, Stanley knife, marker pens, drawing pins, Blu-Tak, sticky fixers, Sellotape. It's amazing how often this saves the day
- Allow at least twice as much time as you think you need for setting up. When something big goes wrong, you'll be glad you did. Even better, do it the day before the event if that's possible

# After the event

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- If it was a success, write and thank everyone who contributed to making it so, being extremely careful not to leave anyone out.
- Make sure that all the follow-up actions that you planned before the event actually happen. This may involve writing to guests to say what a pleasure it was to welcome them and suggesting further contact, it may mean following up business leads or it may mean organising further events, mailings or meetings
- Evaluate the event against the objectives you set beforehand. How successful was it in those terms? Did it lead to benefits that you didn't expect? If so, what do you need to do next to capitalise on them?
- Report back to the stakeholders in the event. Whoever they are – whether the Vice-Chancellor, your head of department, a steering group, a funding council etc – they will want to know what it delivered. Even if it wasn't as successful as they had hoped, they will appreciate the fact that you've investigated the reasons and learned the lessons

# Useful Contacts

Service	Contact name/number/email
<p><b>Audio Visual Services</b> – provide equipment and technical expertise in support of events. Equipment includes data projectors, plasma screens, PA systems, microphones, slide projectors, poster boards etc</p>	<p>Equipment bookings  <a href="mailto:audio-visual@sheffield.ac.uk">audio-visual@sheffield.ac.uk</a>  <a href="http://www.shef.ac.uk/cics/av">www.shef.ac.uk/cics/av</a>            Ext: 29297</p>
<p><b>Catering</b> – all types of catering for events</p>	<p>Deborah Tilbrook, Functions and Events Manager  <a href="mailto:d.tilbrook@sheffield.ac.uk">d.tilbrook@sheffield.ac.uk</a>            Ext: 28991</p> <p>Katy Hinton, Deputy Events Operations Manager  <a href="mailto:k.hinton@sheffield.ac.uk">k.hinton@sheffield.ac.uk</a>            Ext: 28910</p> <p>Lindsay Wilson, Hospitality Sales Coordinator  <a href="mailto:l.l.wilson@sheffield.ac.uk">l.l.wilson@sheffield.ac.uk</a>            Ext: 28968</p>
<p><b>ConferencewithUS</b> – the University's conference office who can help co-ordinate your event requirements, specifically looking at accommodation and conference facilities within our Halls of Residence</p>	<p>Sarah-Jane Johnston, Business Development Manager, Conference Office, Accommodation and Commercial Services  <a href="mailto:sarahjane.johnston@sheffield.ac.uk">sarahjane.johnston@sheffield.ac.uk</a>            Ext: 28908</p>
<p><b>Events Team:</b>            Organise Graduation, Civic Service, Legal Service, VIP visits, prestigious lectures etc</p> <p>Provide advice and guidance on events to all departments – discuss ideas, venues, layout, protocol for VIPs, how to get the best out of your events, where to go for what etc  <a href="http://www.sheffield.ac.uk/eventsteam">www.sheffield.ac.uk/eventsteam</a></p>	<p>Wendy Hobson, Head of Events  <a href="mailto:w.hobson@sheffield.ac.uk">w.hobson@sheffield.ac.uk</a>            Ext: 28895</p> <p>Janet Taylor, Events Manager  <a href="mailto:janet.taylor@sheffield.ac.uk">janet.taylor@sheffield.ac.uk</a>            Ext: 28894</p> <p>Polly Wilson, Events Manager  <a href="mailto:p.j.wilson@sheffield.ac.uk">p.j.wilson@sheffield.ac.uk</a>            Ext: 25322</p>
<p><b>Firth Court Porters</b> – provide useful advice on room layout at Firth Court</p>	<p><a href="mailto:firth.porters@sheffield.ac.uk">firth.porters@sheffield.ac.uk</a>            Ext: 29260 or 29259</p>
<p><b>Flowers</b> – can be arranged through University Catering when required for events where catering has been ordered</p>	<p>Deborah Tilbrook, Functions and Events Manager  <a href="mailto:d.tilbrook@sheffield.ac.uk">d.tilbrook@sheffield.ac.uk</a>            Ext: 28991</p> <p>Katy Hinton, Deputy Events Operations Manager  <a href="mailto:k.hinton@sheffield.ac.uk">k.hinton@sheffield.ac.uk</a>            Ext: 28910</p>
<p><b>Media Team</b> – for help publicising your events in the media</p>	<p>Shemina Davis, Media Relations Manager  <a href="mailto:shemina.davis@sheffield.ac.uk">shemina.davis@sheffield.ac.uk</a>            Ext: 25339</p> <p>Amy Stone, Senior Media Relations Officer  <a href="mailto:a.f.stone@sheffield.ac.uk">a.f.stone@sheffield.ac.uk</a>            Ext: 21046</p> <p>Amy Pullan, Media Relations Officer  <a href="mailto:a.l.pullan@sheffield.ac.uk">a.l.pullan@sheffield.ac.uk</a>            Ext: 29895</p>
<p><b>Octagon</b> – to book the venue, discuss room layout, arrange a banner on the building, parking etc</p>	<p>Reuben Grocock, Head of Performance Venues  <a href="mailto:r.t.grocock@sheffield.ac.uk">r.t.grocock@sheffield.ac.uk</a>  <i>Continued overleaf</i></p>

<b>Octagon – Continued</b>	James Clay, Admin Assistant, The Octagon j.e.clay@sheffield.ac.uk Ext: 28877  Lesley Vernon, Admin Assistant, The Octagon Lesley.Vernon@sheffield.ac.uk Ext: 28888
<b>Parking Services</b> – deal with the management of campus car parks as well as general travel options	efmhelphdesk@sheffield.ac.uk Ext: 29000
<b>Photography</b> can be booked for your event through the Marketing Department's web pages	www.sheffield.ac.uk/marketing/help-yourself/photography
<b>Plants and flowers</b> – all types of plants and floral arrangements to dress your event	Alan Henderson, Landscape Supervisor Alan.henderson@sheffield.ac.uk Ext: 29042
<b>Plaques</b> – for opening ceremonies	Colin Barrett, Portering Team Leader central.portering@sheffield.ac.uk Ext: 29245
<b>Portering Services</b> – for jobs involving porters, eg, furniture moving for venue layout, portable cloak rails with hangers, tables/chairs for events	central.portering@sheffield.ac.uk
<b>Room Bookings</b> – deal with the booking of University "pool rooms". Check availability and book any rooms	www.shef.ac.uk/cics/roombookings roombookings@sheffield.ac.uk Ext: 29060
<b>Security</b> – help and advice on VIP visits or any event where there may be any risks involved	Richard Yates, Security Services Manager r.yates@sheffield.ac.uk Ext: 29232  Nev Hamilton, Security Operations Manager Nev.Hamilton@sheffield.ac.uk Ext: 29075
<b>University maps</b> – to obtain hard copies of University maps for invitees for events	Richard Lomas r.lomas@sheffield.ac.uk Ext: 21231
<b>University Print Services</b> – can help with all the design and printed material you need for your events	Paul Tetley, Print Manager p.tetley@sheffield.ac.uk Ext: 21221  Tom Goodall, Print Estimator t.goodall@sheffield.ac.uk Ext: 21225  John Jones, Print Estimator j.jones@sheffield.ac.uk Ext: 21229

Do you need advice on how to organise your event? If so, please contact The Events Team.	www.sheffield.ac.uk/eventsteam
<b>Bidding to host or organising a conference in the city?</b>  Support is available from the Sheffield Convention Bureau (part of Sheffield City Council) no matter how large or small your event. Their services are complimentary and they have excellent links with conference and dinner venues across the city region and all hotels. They also work closely with the University Conference Team.	For further information or to arrange a meeting contact Gemma Tissington: gemma.tissington@marketingsheffield.org Telephone: 0114 223 2403

# Event planner

Name of Event:	Date & Time of Event:
Venue:	Budget vs cost of event:
Contact(s) at UoS:  External Contacts:	Objective:
Target audience / No. of attendees:	Type of event: (dinner, lunch, visit, poster session, seminar etc)
Room Layout:	Catering: YES/NO Details:
VIPs/Speakers: YES/NO Details:	Briefing for VIPs/speakers:
Type of communication: eg. Invites, brochures, maps, letter etc.	Audio Visual: YES/NO Details:
Name Badges: YES/NO	Transport: YES/NO
Media Opportunities: YES/NO Details:	Accommodation: YES/NO
Additional Requirements: Photos/ Flowers/Decoration/Signage/Parking Details:	Publicity on website: YES/NO



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### **Events Team**

Wendy Hobson, Head of Events  
[w.hobson@sheffield.ac.uk](mailto:w.hobson@sheffield.ac.uk)  
Ext: 28895

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[janet.taylor@sheffield.ac.uk](mailto:janet.taylor@sheffield.ac.uk)  
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Ext: 25322