



The University of Toledo Advancement Events Pre-Planning Checklist

Strategy

- What is this event trying to accomplish?
- Who are you trying to target?
- How does it fit into your departments overall strategic plan?
- *Is this event scalable? Could it become an event series/travel for several locations?*

Date, time, location of event

- What is the date(s) of the event?
- What is the best location?
- What time of day best suits an event of this nature?

Size of event

- Ideal number for optimum guest experience and to achieve goals
- Physical capacity of space, amount of available seating, comfort of guests
- Budgetary limitations

Budget and Timeline

- Who will cover what portion of costs? Who approves?
- What deadlines must be established to ensure that event plans continue smoothly?
- How will anticipated travel and other conflicts impact those deadlines?

Guest List

- What criteria will be used to determine invitation list?
- What other units across campus might be interested in partnering?
- Who will manage all VIPs / Prospects and Donors?

Communications: Invitations, Hold the Date, RSVP

- What is more appropriate for the event - email or printed?
- If printed, what is the best 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?
- Will a Save The Date be necessary? Best "drop" date?
- Who is the contact for the RSVP?
- Is there a web link / landing page / hashtag that could be included?
- What kind of confirmation will guests receive once they register?
- Are there maps / directions that could be included?