

Yale *Conferences & Events*

OFF-CAMPUS EVENT PLANNING GUIDE

Planning an off-site event requires thorough organization and attention to detail to ensure everything runs smoothly. Here are a few helpful tips for planning a successful off-site event.





FINANCES

Budgeting

- Discuss spending expectations, especially considering that costs may vary in different cities.
- Consider adjusting the per-day limits for food and beverage expenses based on the event's location.
- Obtain necessary approvals or allowances for expenses related to food and beverage, accommodations, etc.

P-Cards and Payments

- Evaluate whether P-Card limits, both per transaction and monthly, need to be increased to accommodate expected charges and make necessary adjustments to ensure smooth financial transactions.
- Ensure that suppliers are set up as Yale Vendors if payments will be made via invoice.

Tax-Exemption

- Check the tax-exempt status in other states where applicable.
- Complete any necessary applications for tax exemption.

Compliance

- Adhere to Yale finance policies regarding expenses such as per meal costs, regardless of the event location.
- Seek exceptions from the controller's office as needed.



LOGISTICS

Site Visit

- If possible, conduct a site visit to familiarize yourself with the off-site venue and surrounding area.

Local Assistance

- Alternatively, work with the local Convention and Visitors Bureau (CVB) for guidance and assistance.

Transportation

- Research city traffic patterns for the time you'll be moving the group between locations.
- Allocate sufficient travel time to avoid any delays between Point A and Point B.

Shipping

- If materials need to be shipped in advance, plan accordingly to allow ample time for delivery.
- Ensure all shipping arrangements are made in accordance with Yale policies.
- Obtain approval from the controller's office for shipping arrangements, especially if items are being shipped directly to the venue.

Vendors

- In addition to the CVB, ask your venue or meeting host (if applicable) for recommendations on preferred vendors for food and beverage, AV, décor, etc.



GUEST EXPERIENCE

Communication

- Prepare to send informative emails to guests either the night before or the day of the event.
- Clearly communicate event details, including location, schedule, dress code, and any items they should bring.

Connectivity

- Confirm the availability of guest Wi-Fi at each location to ensure seamless communication and connectivity.

Diversity, Equity, Inclusion and Belonging

- Be sure to look at your event through the eyes of inclusivity, accessibility and sustainability. This can include initiatives such as hiring local casual staff, offering a hybrid option, and opting for online materials instead of print.

Food and Beverage

- Note any specific preferences or dietary requirements of guests.
- Ensure favorite snacks and beverages are available, considering regional preferences.

By following these steps and staying organized, you can ensure a successful and well-executed off-site event for Yale University.

Not sure where to start?

Visit yale.edu/meet to learn more and submit your event inquiry.


MAKE YOUR NEXT OFF-CAMPUS EVENT EXCEPTIONAL

Yale Conferences & Events' unmatched event planning expertise has you covered every step of the way.

Contact us for more information on our individualized services and learn how we can help make your next off-campus event exceptional.

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