

Event Planning - Overview

As club and cluster leaders you will be tasked with planning receptions, conferences, meetings, and activities for your peers, alumni, staff as well as various external partners. With that, when planning an event consider three main check points – (1) Determine your audience; (2) Determine the best location; (3) Determine your budget. Use the below questions to help guide your event.

1. Audience

In order to have a seamless event you must first determine the following:

- a. Who is this event targeted to? Students, faculty, staff, alumni and what will be their role in this event be?
 - i. As a best practice, secure your speaker/panelist/presenter at least three weeks in advance and explain to them the purpose of the event, who will be there and why it's important to have them there.
 - ii. A week before the event reach back out to your speaker/panelist/presenter and provide them an overview of what the event will look like and feel like. Also be sure to ask them for any required logistical components (lavalie mics, whiteboard, etc.).
- b. How many audience members will there be at this event?

2. Location & Set-up

Space and set-up are an important part of your event flow, look and feel. With that, consider the following:

- a. Book a space that fits your audience, if your event is more intimate, a smaller room would work best. If your event is a reception, a large networking space would be ideal.
 - i. To assist with this, review your audience notes from above and determine the best space and set up for your type of event. Keep in mind the budget when doing so.
- b. Does the space require additional set-up and who can assist in this process?
 - i. In Uris Hall, Operations can assist with any table ordering, moving, and set-up and cleanup for events.
 - ii. Outside of Uris be sure to ask the approved vendor and/or caterers for their most common set-ups and let them know the structure and purpose of the event.

3. Budget

As you plan your event, cost should be tracked and reconciled, in the future this we help your predecessors determine their needs for an event, both fiscally and responsibly. Below are a couple of items to consider as you prepare and conclude your event.

- a) By determining your type of event with the above checkpoints you can then determine how much it will cost per person. As a best practice, keep in mind the approved costs per person, if an exception is require you should notify OSA at least two weeks in advance.
- b) As a best practice meet with a representative from the Financial Planning Office (FPO) to determine the best approved vendors that will meet your above needs.
- c) Lastly, ensure that allow time for the proper costs to clear on your ARC Report and discuss any discrepancies with FPO.

Event Planning - Step By Step

I. Steps to planning an event:

- a. Determine your type of event and audience
- b. Find a space that fits your needs
- c. Submit a preliminary budget and make sure they are in line with your spending guidelines as per the document. If you have questions about these guidelines, your OSA advisor and FPO can certainly assist you!
- d. Review vendor list to assess venues
 - Keep in mind the approved venues
 - It's best to reach out to venues that you know the students have worked with in the past as this is a good negotiating tactic
- e. Contact FPO to discuss contract logistics
 - Know which venues accept a voucher vs. contract
- f. Contact venue for a proposal keeping in mind the spending guidelines, alcohol policy and University guidelines in regards to blackout dates and times
- g. Connect with FPO regarding the contract approval process
- h. Send communication out to the students two weeks prior, if this works with your current calendar of events
 - Consider whether your event requires RSVPs and determine how these will be collected and tracked
- i. Submit your anticipated guest guarantee to venue three days prior
- j. Keep in mind rain back-up locations and vendor cancellation policies
- k. After your event, debrief with your team.