

SAMU STUDENT GROUPS

**EVENT PLANNING 101**

Information & Resource Guide

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**Introduction**

Event planning is a positive way to engage, inspire and connect students to the University of MacEwan community. Group events range from educational, academic, professional, spiritual, and social. We hope that this information guide will assist you in planning successful events on and off campus. The key to a successful event is thoughtful planning and communication from the beginning to the end of the event. The Student Group’s department is here to help you do that.

Keep in mind all group events must be approved by the Student Groups Department. Groups are not allowed to book space, sign contracts, or confirm any sponsorship details until their event has been approved. Groups have a responsibility to ensure that their events adhere to SAMU and MacEwan University rules and regulations. The SAMU Student Groups department is available to assist you with any questions or concerns you may have regarding event planning. We act as your connection to University services such as conference services, facilities, and security on campus.

**SAMU and Student Groups Events**

SAMU supports groups hosting events on and off campus by employing 2 full-time staff members, as well as admin staff. It's our job to provide support and resources to you. SAMU also provides financial support via the $2000 Event Grant for groups. This funding is available year-round and a committee reviews these grants. The Student Groups department will notify the event organizer by email how much they have received or if additional information is required. For more information on this grant go to [www.samu.ca](http://www.samu.ca) and click on “Governance” and search for “Student Group Grants”.

**Planning for On-Campus Events**

An on-campus event means that you are planning on having your event in one of MacEwan Universities’ classrooms, or special event spaces. Please note that there are conditions upon which must be followed by a group to use this space. The spaces themselves are free to our groups to use, except Allard Hall, but there are conditions that the University places on us in order to use that space for example, using the onsite food catering company Aramark. Hosting an event on campus may save you money; you will not need to purchase an alcohol license, or event insurance. MacEwan is registered to serve alcohol so make sure your guests know to bring their government issued photo identification. Student ID is not acceptable for any events where alcohol is served**.** Here are some points to consider if you are having alcohol at an event.

* Ensure that you have received the approval to hold your event by completing the Student Group Event Approval Form
* Ask the Student Groups department to help you book your venue
* Make sure that your venue is accessible
* Create a reasonable and realistic budget
* Once you have booked your venue, the Student Groups department will arrange to connect you to the University’s facilities department. Facilities prefer that you have diagram of how you want a room set up, if you need a stage (size), if you need draping, and if you require whiteboards. If you are having an event past regular university hours you will be charged an hourly rate to keep the building open past regular operating hours. Discuss this with facilities so you will know roughly how much it will cost you. Note that if there are any cleaning requirements, your group will be charged for that.
* Events with alcohol require that the Student Groups Department contacts Security to determine appropriate event support. You may be required to pay for security services and will be informed by the Student Groups Department if this is required.
* Events with alcohol require that you contact Aramark to arrange for alcohol service. Your group will be charged for this service. It's important that you discuss this with the catering manager. Ask for a quote and have it emailed to you.
* Events not in the SAMU building requiring food service must use Aramark. All MacEwan special event spaces require you to use Aramark for example, Paul Byrne Hall, Heart of the Robbins, MPR, CN Theatre, Atrium. The only place that a group can bring in its own food is the SAMU Building. Groups can also host potlucks in classrooms for small gatherings.
* Book your audio-visual needs. This is a cost to groups so make sure that you know what you need. For example, a dedicated technician for an event starting at 7pm and ending at 9pm will cost roughly $300. Make sure that you book AV requirements early enough because if you don’t, you won’t have technical support for your event or you will end up paying the late booking charges. There is a section on the event approval form that deals with this issue. The Department arranges for technical support on the group’s behalf.
* Meet with the Student Groups Department to keep them informed and updated on changes to your event. Email is another option for you to use. The better informed we are the more successful your event will be.
* Advertise your event to the rest of the group and membership. Make sure you reach out to the Student Groups departments so they can ask Marketing to post it on our Student Groups’ Facebook, and Twitter accounts. Also feel free to reach out to the griff, the student newspaper to advertise your message. There is a cost for groups to advertise in the griff.
* Ensure that you have sufficient group executives and volunteers for your event. Ensure that they are trained and recognized for their contribution.
* Ensure that all applicable University policies and procedures are followed. If you are not sure, check in with the Student Groups Department

**Planning for Off-Campus Events**

Off-campus events are usually organized to make money for groups, but keep in mind that the costs and liability greatly increase when you plan these types of events. Read all contracts thoroughly so there are no surprises at the end of the night. Contracts and sponsorship agreements should be submitted to the Student Groups Department for review before signing. Its good practice to allow for a bit of extra time for planning and processing time for off campus events.

* Ensure that you have received the necessary mandatory approvals to hold your event. You need to fill out the Group Event Approval Form prior to signing any contracts with vendors.
* Ensure that adequate and appropriate insurance coverage is in place. You will be notified by the Student Group Department what steps you need to put in place for your event.
* The Groups department will refer you to the samu.ca website to complete the special event insurance application forms and submit them to the Student groups Department at least 3 weeks before the scheduled event. We submit these forms to our insurance provider who will inform us how much the insurance will cost for you to hold your event.
* Book the venue and pay for any damage deposits required to hold the space after you have received approval to have the event.
* Ensure that you have contacted a caterer for your event and received a quote, so you know up front how much the food, beverages, etc are going to cost.
* If you are serving alcohol at the event ensure that the Student Group Department has a copy of the liquor license, pro-servers certificates, security contract, and event insurance.
* Create a reasonable and realistic budget.
* Advertise your event to the rest of the group and membership
* Make sure that you have the proper equipment for safe food handling (rules set out by the Board of Health)
* Ensure that you leave the venue clean, and garbage and recycling products have been handled. Often this is identified in your contract.
* Ensure that you have sufficient volunteers and that they are trained and recognized.
* Ensure that all applicable University and SAMU policies and procedures are followed
* Request cheques to pay the vendors, entertainers, and security early enough so they are ready in time for the event.

**Food and Beverage Guidelines**

**Events Without Alcohol**

Due to the complex nature of alcoholic events, we encourage dry events. There are many possibilities for events that do not involve alcohol. Here are some ideas but keep in mind alcohol can be added to all of these activities. Once a group involves alcohol in an event, extra protocols including insurance are required.

- Bowling and Billiards Night - Pizza Social

- Faculty and Staff Meet and Greet - Ultimate Frisbee

- Indoor Miniature Golf - Paintball/Laser Tap Night

- Haunted Hike - Scavenger Hunt

- Winter Carnival - Video Dance Party

- Music Ensemble - Bagel Brunch

- Student Council Introductions - Pre-Law Info Session

- Picnic in the Park

- Hot Cocoa & Cider Night - Karaoke Night

- Board Game or Computer Game Tournament - Indoor/Outdoor Movie Night

- Where’s Waldo Campus Tour - Giant Twister

- Grape Juice & Cheese Night -Society vs. Society Competition

- Early Bird Swim - Meet the Dean Event

- Mini Olympics - Amateur Photo/Art Show

- Luau Night - Group Fitness Class

However, if you are opting to serve alcohol at your event, keep in mind that a large number of people may choose NOT to drink alcohol, so alternative beverages should be available when alcohol is served. Examples include virgin cocktails, smoothies, fruit juices, coffee/tea, bottled water, fruit punch or hot chocolate. It may be necessary for you to purchase event insurance and security for these types of events to ensure the safety of your guests and prevent any legal liabilities. Best practice is to check with the Student Groups Department.

**Events with Alcohol nn Campus Reminders**

* Alcohol can only be served by Aramark. No special occasion permits are allowed on campus. If you are having an event at Towers, Paul Byrne Hall, Multi-Purpose Room, Heart of the Robbins, or the Atrium, no licenses are needed however security services may be required. Check with the Student Groups department before serving alcohol in the SAMU building.
* How will you ensure that only participants of age will be drinking? Remember using wristbands is not flawless. Underage participants must be banded.
* Do your executive/volunteers know that they are required to remain sober throughout the event?
* Is your event causing inconvenience or concern to any members of the community (loud music)?
* Have your executives/volunteers received the appropriate training prior to the event?
* Aramark will be responsible for checking student ID.

**Events with Alcohol Off Campus Reminders**

* Have you submitted a copy of, license to serve alcohol, pro-serve certifications to the Student Groups Department for approval? Individuals that have pro-serve certification check ID and have the responsibility to refuse alcohol to a guest.
* Underage participants must be banded.
* Do your executive/volunteers know that they are required to remain sober throughout the event?
* Have you hired security? This is a requirement.
* Is your event causing inconvenience or concern to any members of the community?
* Have your executive/volunteers received the appropriate training prior to the event?

**Excessive/Underage-Drinking Reminders**

SAMU has certain requirements that must be followed if your event includes alcohol and minors. The risk level for an event always increases when alcohol is involved. For events on campus, all alcohol must be served by Aramark. Minors who attend events at SAMU must wear a wrist band so that they are easily identifiable. If the event is held off campus the same regulations apply. A stamp is not sufficient. Following is a list of things to keep in mind.

* Student Groups volunteers should keep an eye on dangerous areas such as stairs, balconies or hallways
* If the event is held on campus the bartenders and servers will be employees of MacEwan University and will be pro-serve trained and know how to detect intoxication and what quantities of alcohol can be legally served to event participants.
* If the event is held off campus, the group must ensure that bartenders and servers are Pro Serve Certified. A copy of the certification must be given to the groups at least 2 weeks prior to the event. Also, security guards will be required for the event and the department will need to know the name of the company providing security.
* Individuals that display signs of intoxication will be cut off immediately this is the responsibility of the certified pro-serve staff.
* If an event is all-ages, those under the age of 18 are to be wrist banded
* Student Groups volunteers should monitor the behaviour of all attendees and report any problems to their team leader or the Group President who will determine further action.
* Groups must abide by the provincial liquor laws when planning events with alcohol.

**Food**

If your event is being held on campus and involves food, and you are not in the SAMU building, you must work with Food Services. The contact for catering is catering@macewan.ca. It’s helpful to have a clear understanding of what you want to serve your guests before you meet with the caterer. Things to consider when ordering food:

* Budget how much do you have to spend.
* Consider the type of food you want to serve (buffet style, formal plated dinner, appetizer bar, informal style like pizza, wraps etc.).
* Catering will work with you to create a menu based on your food budget.
* If the event is held off campus you are free to use your own catering company.
* Do your research about the company and do not pay them until they have delivered the food for your event. Some companies may ask for a deposit, read the contract carefully. It is the old adage “Buyer Beware”.
* Consider dietary needs attendees may have (vegan, vegetarian, gluten-free, allergies etc).
* You may bring your own food into the SAMU Building.
* If you are a hosting a potluck event be sure to follow the potluck guidelines available on the SAMU Student Groups website.

**Outdoor Events**

Weather is one of the hardest things to predict, and wind, rain, snow or sun can adversely affect the success of your event. Consider the following when planning an outdoor event:

* Check the weather report prior to any outdoor event
* Arrange for an alternate indoor venue if required
* Always ensure water is available when holding an outdoor event during warm weather
* Shaded areas should be created for those who want to get out of the sun
* Minimize sun time by holding the event later in the day or for shorter time periods
* Remember that people often won’t notice heat/sun stroke until it hits them
* Find someone who has basic first aid training.

**Examples of Activities and things to consider**

Making Ice Sculptures

* Are the activities to be performed clearly outlined?
* Is there going to be a mass amount of water in one area that could lead to injuries, horseplay, or electrical concerns? Have you done a basic risk assessment?
* Are there any areas that could be damaged by this activity?
* Does your event run the risk of personal property being jeopardized, such as clothing?
* Have you received approval from facilities to make ice sculptures?

Scavenger Hunts

* Do you have a list of items to be found? Has this list been approved by the appropriate people?
* Is the list appropriate? i.e. no stealing
* Have you set parameters for the event as well as a timeline?
* Do you have a group leader?

Physical Activities ( e.g. Bungie jumping, bowling,)

* Have you recruited volunteers with First Aid training?
* Have you provided, signed and collected all waivers?
* Have you provided food and refreshments for participants?
* Have you checked to see what type of insurance requirments you may need for this event?

Events With Fire (e.g. Picnic and bbq in Hawrelak park)

* Check to make sure no fire ban is in effect.
* Are park officials, campus security, and the fire department informed of your event?
* Check to make sure there is no fire ban in effect
* Is the fire contained in an appropriate container? (ex. fire pit, barbecue drum)
* Where will the First Aid Kit be located in case treatment is necessary?
* Who will be present at all times to monitor the fire?
* What will be used to extinguish the fire?
* Who will stay afterwards to ensure the fire has completely extinguished and cooled down?

Events that involve Travel within Canada

* Complete the University’s travel forms if required (contact the Student Groups department)
* Ensure the department has a contact list of people who are travelling in your group
* Ensure that transportation have been arranged. Is the carrier legitimate?
* Ensure that you have bus monitors (2) and the group has provided appropriate training for them.
* Ensure that you have barricades for loading the bus for trips with over 200 people.
* Have you checked to ensure no one is boarding the bus with alcohol?
* Have you clearly stated to people that upon request, their bags can be checked to view their contents?
* Have you provided, signed, and collected all waivers?
* Is the venue accessible?
* Have you checked with the venue to ensure arrival and departure times?
* Have you signed a written agreement with the venue to take students onto their property?
* How will you ensure that all participants return with you from the event?

Travelling Abroad

* Complete the University’s travel forms whether you are travelling within Canada or abroad
* A signed copy of all students approved for travel *within Canada* must be submitted to the Student Groups Department 1 month prior to travel
* A signed copy of all students approved for travel *abroad* must be submitted to the Student Groups Department 1 month prior to travel
* Attend a pre-departure orientation session hosted by MacEwan International.
* Ensure the department has a contact list of people who are travelling in your group 1 month prior to travel
* Ensure that travelers have all their documentation, passports, health care card etc
* Ensure that all travelers have purchased extra insurance if required
* Ensure that all the traveler’s hotels, meals, flights etc are all arranged
* Ensure that there are 2 people from the groups who serve as go to people in case of emergency
* Adhere to all MacEwan University policy and procedures when travelling abroad

**On Campus Bakesale Events:**

Bake-sales are a way to help a group fundraise, but the University has very strict rules about what can be sold. It is very important to make sure that you list the items on the Group Bake-sale sections of the Event Form available on Student Groups Connect. The Student Groups department has to get approval from Hospitality Services before a bake-sale can proceed and will notify you once it has received approval. Some things to keep in mind regarding bake-sales.

* Have you reviewed the Bake-sale Guidelines Information sheet on our website?
* Have you booked the bake-sale table with our front desk?
* Have you filled out the Bake-sale Form and had it signed off by the front desk administration?

**Risk Management Practices**

A SAMU Student Group hosting an event or activity is responsible for the behaviour of its guests along with injuries that may result at an event they are hosting. Its good practice to look at all of the things that could wrong at your event and strategize how you will minimize potential risks. Here are some things to keep in mind when accessing the risk. Notify the Student Groups Department if you experience any of these behaviours at your event within 24 hours. There is an incident report form on [samu.ca/studentgroups](http://samu.ca/student) form page for you to fill out.

* Volunteer to attendee ratio should be 1:20 depending on the nature of the event.
* Consider the community surroundings. For instance, what are the city by-laws or campus rules with regard to noise? This is important to consider if you are in a building or using the grounds around a building, especially residence buildings.
* Does your event conflict with any other mandatory event or holiday?
* Have you used the correct language on your posters and other means of advertising?
* Is your advertising discriminatory or offensive?
* Are your safety and security plans clearly outlined?
* Is your event inclusive and accessible?
* Have you planned appropriately for your target group of participants?
* Is your event conflicting with any laws of the land, objectives of the University or by-laws within your organization?
* How many people are coming to your event?
* Is this event dangerous in any way (Going for a walk versus Hip Hop Dancing)

**Inappropriate Behaviours**

When an event is quite large, and alcohol is being served sometimes inappropriate/aggressive behaviour may result. Here are some things to consider if/when it occurs:

* Look to your team for support to diplomatically handle the situation
* Don’t be condescending or aggressive. Hostility will only make the situation worse
* If you feel uncomfortable in any situation, ask for help or contact Campus Security (497-5554), 911 or the security staff at the venue.
* Give someone a chance to stop what they are doing, forgive and forget, or sober up
* Individuals who continue to be a problem should be removed (Campus Security should remove the person causing the altercation from the area). If your event is off campus contact, the security guard at your event. They will contact police
* Ensure attendance does not exceed building or room capacity
* Once capacity has been reached, stop admitting people immediately
* Ensure the entrance is accessible for all participants, keeping in mind various accessibility requirements and needs (e.g wheelchair access)
* Ensure that your group completes an incident report and submits it to the Student Groups department.

**Removing Belligerent Guests**

Removing event patrons should only be done by Campus Security and only as a last resort, as per below.

* Ask the person to leave on their own. If they refuse, do not hesitate to ask Campus Security (780.497.5555) to remove belligerent, insulting, threatening, or hostile individuals.
* Report the time and description of the person ejected to the door staff and the primary organizer
* Ensure that your group completes an incident report and submits it to the Student Groups Department.

**Medical Emergencies**

A medical emergency can include everything from a bloody nose to a seizure. It is a good idea to have a First Aid Kit on site and to contact Security. In the event that a situation arises:

* Assess the situation to determine what needs to be done
* Contact Campus Security, or 911 depending on the urgency of the situation
* Keep them calm and get all the details surrounding the incident
* Be prepared to evacuate the venue if circumstances warrant

**Event Day Procedures**

There is a chance that if something can go wrong, it most likely will. Event planners who keep this in mind are usually the most prepared and best equipped to handle any situation that may arise. If an event has been well planned, and your executive and volunteers are familiar with safety and security procedures, you should be able to run and implement the safest event possible.

The following paragraphs outline some procedures to handle potential situations and emergencies you may come across during an event. In the event of any emergency or need for First Aid, contact Campus Security (780.497.5554) or 911.

**Pre-Event Procedures**

Prior to any event, there are precautionary measures that should be taken. They include the following:

* Review the fire regulation and building capacity policies for the event location
* Check the event site to ensure it is fully accessible (elevators, ramps etc.)
* Obtain a cellular phone and distribute the number to all event staff
* Design a means of communications for all staff – utilize headsets, if possible, to remain in constant contact
* Hold a training session for all staff/volunteers before their shift, reviewing the entry/exit points, safety equipment, and emergency procedures
* Create a rotation schedule for all security persons, ensuring staff have been assigned to all areas of the venue
* Place Student Group volunteers in strategic areas so they can quickly respond to all situations
* Ensure group members/volunteers are dressed so they are clearly visible
* Conduct a final venue check before the doors open to ensure everything is ready

**Post-Event Procedures**

Responsibility for event participants does not cease once they have left the event venue. Injuries or damages that occur after the event has concluded can become the responsibility of the student group and event staff. To protect the safety of event participants, you can:

* Contact Safe-Walk to walk students home or to their cars
* Call taxicabs or arrange for transportation after the event
* Campus Security should be located outside the event to prevent any damages and the consumption of the alcohol outside the event venue
* Report all outstanding event details to a staff/student advisor
* Submit waivers if you were directed to do so through the event approval process

**Entrance Procedures**

To ensure a smooth entry process for event participants:

* Stagger event entry and use barricades to avoid areas of high congestion
* Arrange for adequate entry areas to prevent long lines or have a system in place that can control the queue.
* Utilize signage outside the venue to indicate the doors that are accessible
* At least two-line monitors should supervise the entry line into an event, to keep the line calm and orderly
* Door staff should work in pairs, with one person checking identification cards/wristbands, and the other taking tickets and admission fees
* One student groups volunteer should keep track of the number of people within the venue, to ensure attendance does not exceed building or room capacity.

**Event Resources**

In this section you will find some resources for your group to use to help them with event planning. Feel free to adapt these to your groups event needs.

**Event Evaluation Feedback from Guests**

There are many ways that you can assess how successful you event was. For example you can ask participants to complete an on-line survey and offer an incentive such as a gift card. You could have volunteers roaming around with tablets asking participants to complete a survey. The key here is to keep it brief and make it easy. Don’t ask for a lot of detail. You can also leave a paper survey at the tables and remind the guests that you will be picking them up at the end of the event.

Here is a sample of an Evaluation Questionnaire you may want to use. Remember keep it to under 10 questions. Please remember to review the feedback you receive and add it into the Post Summary Event form that the Chair of the committee completes.

Evaluation Questionnaire Sample Questions

* Were the date and time of the event convenient for you? Yes or No
* Were you able to find the venue? Yes or No
* How easy was it to register for the event? Extremely, Easy, or Not Easy at all
* How would you rate this event? Excellent, Very Good, Good, or Poor
* How would you rate the cost of this event? Excellent, Very Good, Good, or Poor
* How satisfied were you with the food? Excellent, Very Good, Good, or Poor
* Would you attend this event again?
* Would you recommend this event to a friend?

**Sample Event Committee Job Titles and Duties**

|  |  |
| --- | --- |
| Title | Duties |
| Chair  Name: | Call and chair meetings of the committee, liaise with various coordinators, liaise with group secretary to set agenda for future meetings, liaise with the Student Groups department, and facilitate communication with committee. |
| Secretary  Name: | Records and distributes meeting minutes including action items and persons responsible, works with chair to prepare agenda. |
| Treasurer  Name: | Maintains accounting of the event expenses and revenues, understands, and is involved in creating the budget for events, liaises regularly with the Student Groups department to ensure balances match, prepares financial statements during and after the event has ended, outlines if group has gone under/over budget. |
| Fundraising Coordinator  Name: | Prepares a funding strategy for committee and volunteer coordinator, carries out fundraising strategy with volunteer coordinator, maintains contact lists of all financial and in-kind donations, prepares thank-you letters to donors, acquires appropriate licenses/permits, liaises with volunteer coordinator on volunteer needs, develops sponsorship package to be mailed out to potential sponsors. |
| Promotions Coordinator  Name: | Prepares a publicity strategy for the event (to be approved by committee), arranges any promotional swag (ex. T-shirts) |
| Volunteer Coordinator  Name: | Recruits volunteers, maintains a list of volunteers along with keeping track of hours worked, prepares job description for volunteer positions, communicates with volunteers the day of the event to ensure they have what they need. |
| AV/Facilities Coordinator:  Name: | Ensure all AV equipment is working and has contacted MacEwan technician to ensure there is a mutual understanding of what is requested, the booking of sound and lights (if the event is off-campus), checking out the space after set-up to ensure all is done the way it was requested. |
| Catering Coordinator  Name: | Arrange for food for guests, develops a menu from a budget given by the overall committee, (again, if it is on-campus catering must be done through Aramark; You may be subject to after-hours cleaning charges for your event), the committee and the Student Groups department will need to know of caterers for off-campus events, purchases liquor license, purchases event insurance, hires security guards, arranges underage wristbands. |

**TASK PLANNER**

Here is an example of a task scheduler to help keep track of who is doing what for your event. Remember to update this as much as possible. Hint: If you want to be extra organized, create this as a google doc that all your coordinators have access to, so that when a task is finished, they can update it themselves.

Make sure that when you develop your task organizer it is clear and concise so that whoever is reading it knows exactly what is going on.

EXAMPLE TASK PLANNER:

|  |  |  |  |
| --- | --- | --- | --- |
| **Date of Event: September 1** | | | |
| ***Task*** | ***Target Date*** | ***Person Responsible*** | ***Status*** |
| Booking of Room | June 9th | Emily | Tried to book room 7-292, but was already booked. Inquired about 7-293, and they are getting back to me. They said it should be good to go, but I will know for sure by the 8th. |
| Booking of Entertainment | June 23rd | Vanessa | The Red Hot Chili Peppers said they were available, just waiting on a confirmation email! |
| Catering | July 7th | Rachel | Contacted Aramark but have yet to receive quote |

**Event Checklist Outline Form**: This will help you take a realistic look at what you are doing

**1 Pre - Planning:**

What type of event will this be? Is it public?

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Who is the target audience for this event? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What are the objectives of the event?

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What is hoping to be accomplished?

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How will you know when your goals have been accomplished?

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Have you considered collaborating with a different group? If so, how will they be involved? Will this event benefit their group as well?

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**2 Date & Time**

We have made sure that…

* A date & time has been selected
* There are no conflicting events on this day
* We have contacted the speaker/entertainment and they are available and have confirmed in an email

**3 Communication and Marketing**

* We have developed a message and a goal for our event
* We have a plan to promote this event
* We have considered and decided on which social media to promote and market our event (FB, Twitter, Instagram, Email lists)
* We have set aside times for the event team to meet

**4 Budget**

We can confirm the expenses of….

* The venue (including the room fee, security, A/V, door persons)
* Entertainment/speakers
* Décor
* Catering & beverages (either Aramark or if off-campus an external caterer)
* Event Insurance (if applicable)
* Alcohol license (if applicable)
* Gambling license (if applicable)
* Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* We can confirm the revenues of…
* Door fee/tickets
* 50/50 Sales

We have also considered aside from budget…

* Fundraising
* Having contingency funds that are more or equal to 10% of our complete budget

**5 Venue**

We have considered…

* Everything the cost includes
* Transportation to/from venue
* Parking
* Capacity of room booked
* Accessibility (wheelchair access? Elevators?)
* Loading dock
* Is there a green room or is there room backstage? (Consider this for events with hired bands and need to store instruments. If there is not enough space, you may have to ask them if they are willing to share things like amps or drums.)
* Is there is a stage/dance floor
* Is there is a soundboard/sound system and someone who works at the venue that can run it
* Is the venue will take posters/marketing tools
* Where the catering will be set up
* Is there are tables that need to be added/removed from room
* Is there is extra seating/if chairs can be removed from room
* Do you need for special/specific permits?

**Event Countdown Guideline Checklist**

12 Weeks Prior to your event

* Webpage has been updated
* Safety/Emergency at event has been discussed and planned
* Internal promotion and marketing has been planned
* Parking services has been contacted (if event is off-campus)
* Entertainment and/vendors are booked and there is a confirmation email (photographer, photo booth, speaker, music)
* Consider involving/hiring students in your event
* Marketing schedule is planned
* Contact designer for marketing
* Travel/accommodation research has begun

10 Weeks Prior

* Ensure that all AV/Entertainment is booked (sound, lighting, DJ)
* Invitations have been designed & dietary restrictions are added if applicable
* Confirm catering (in-house will be Aramark, outside caterer if off-campus. Make sure they have options available for dietary restrictions, and they know the style of the meal such as buffet or sit-down dinner, and there is water available.)
* Print all materials and have them ready to go (tickets, invites, flyers, posters, programs)
* Send out a press release if it is appropriate for event type (formats can be found online)
* Think of something special for guest speakers (flowers, thank you card, etc.)
* Order any plants or flowers needed
* Order any additional decorations
* Arrange for any additional set-up materials from facilities (coat rack, tables, pipe and draping, easels, fans, etc.)

8 Weeks Prior

* Review printed material with designer and make sure all information is correct
* Set menu with caterer
* Secure permits/licenses/insurance
* Order any promo materials
* Arrange transportation such as busses/shuttles (if applicable)
* Order gifts for speakers
* Schedule a run through with AV a day before event (to make sure all equipment is working i.e. projector use)
* Book a room to use as a green room (if applicable)

6 Weeks Prior

* Assemble invitations, make sure there is a system to track RSVP’s
* Distribute flyers, posters, emails that promote your event
* Finalize all travel agreements for speakers or VIP
* Release press announcements to local media (this would have been in the press release you sent out to local media stations)
* Signage is prepared and ready for event
* Walk through venue with event team and make sure that it meets all needs of event and everything/everyone can be accommodated
* Schedule a sound check with musicians (usually day of event - either in the afternoon if venue can accommodate it, or an hour before event begins)
* Determine liquor needs (if off-campus) and order liquor
* Purchase all decorations
* Order extra trash and recycling bins if need be (from facilities)

4 Weeks Prior

* Confirm volunteers and volunteer roles for event, assign lead volunteer
* Schedule an orientation/training session with event volunteers
* Create parking and directional signage (if applicable)
* Create a script for MC – include how long they’ll be talking, and include small intros for bands or speakers including a small bio etc.
* Confirm all travel arrangements
* Confirm security needs with the Student Group’s department
* Complete cheque requisitions for all entertainment so they can be paid day of
* Make sure all bills required have been paid
* Create name tags for VIP/special guests
* Have paper and pens on hand

1-2 Weeks Prior

* Send final numbers to caterers
* Do a final walk thru of the venue
* Hold training session for volunteers
* Create name tags for volunteers
* Confirm set-up and tear-down times with vendors
* Note emergency procedures – fire exits and first aid kits on site
* Confirm security
* Send out final information/instructions about parking to attendees (if codes are needed, where they can park, maps, directions etc.)
* Finalize number of people attending event
* Create guest list for front doors (including the names of bands, speakers, guests requiring assistance, volunteers).

1-2 Days prior to the event

* Create a final to-do list to determine that all tasks are complete
* Create an events day contact list
* Ensure all equipment is in working condition and prepared to go
* Re-confirm schedule with caterer
* Set up registration ahead
* If there is access to venue, decorate ahead of time
* Put out directional signs
* Pick up liquor
* Organize float and cash box
* Ensure volunteers know when to arrive, and what to wear (usually something that is easily visible i.e. Red/orange/green t-shirts work well)
* Establish a way of communication between all staff/volunteers at event
* Have banners, banner bugs, printed materials prepared

Day of Event

* Arrive early and do one last walk thru
* Ensure volunteers arrive on time and sign necessary contracts/waivers (these should remain with the primary organizer)
* Make sure all volunteers are aware of their assigned duties (or assign them at the time) and is aware of their responsibilities
* Go over communication procedures with staff/volunteers
* Ensure that everyone is aware of where the fire exits are and the safety procedures
* Meet guest speaker(s)/bands, make sure they know where to go and when, and ensure that you have their cheques for them, so they are paid.
* Hand over the float money/cash box to the person who will be at the door
* Oversee set-up
* Ensure all VIP materials are in place
* Ensure there is water accessible for attendees, and water on podium/for entertainment (if applicable)
* Complete decoration set-up
* Have incident reports on hand
* Bring extra clothing pieces as needed for volunteers who forget
* Conduct final safety check before doors open
* RELAX and HAVE FUN!!!

**Budgeting Tips**

The success of your group’s events can often depend on its ability to budget effectively. This means taking a serious look at what want and what you can afford. It’s to your advantage to come in under your budget. If you go over, it is the group’s responsibility to pay for any costs that are not budgeted for. Here are some budgeting tips:

* Make sure the event has been approved before you start spending
* Create a budget for the event
* Look at past budgets if available (contact the Student Groups department)
* Try to share resources with other groups when possible (ie book the Improv Group for entertainment or host the event with the Enactus Group)
* Keep and itemize all receipts. Only original receipts will be reimbursed from grant money. If you lose a receipt you will need to fill out paperwork to get reimbursed from your groups regular account.
* Have one person in charge of the budget
* Fundraise and request funds from various internal and external resources (faculty, sponsorship, donations etc).
* Consider charging a small entry fee to help lower costs
* Always set aside some money for miscellaneous or emergency expenses
* Reconcile your account each week to prevent financial errors (group treasurer)

**Sample Budget Worksheet Form**

|  |  |  |  |
| --- | --- | --- | --- |
| Expenses | Cost | Suppliers | Cost |
| Items |  | Office Supplies |  |
| Ticket printing |  | Tape/scissors |  |
| Posters |  | Name tags |  |
| Handbills |  | Cash box |  |
| Flyers |  | Tablecloths |  |
| Advertising |  | Prizes |  |
| Food |  | Gifts |  |
| Alcohol |  | Sound system |  |
| Licenses (raffle) |  | Photo Booth |  |
| License (liquor) |  | DJ/Band |  |
| Pop/Water |  | Lighting |  |
| Event Insurance |  | Gas mileage |  |
| Decorations |  | Meals |  |
| Entertainment |  |  |  |
| AV costs |  |  |  |
| Facility Cost |  |  |  |
| Damage Deposit |  |  |  |
| Napkins, paper plates, cutlery |  |  |  |

Total Expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Possible Revenues

|  |  |
| --- | --- |
| Item |  |
| Ticket Sales |  |
| Bottle Drive |  |
| Bakesale |  |
| Sponsorship |  |
| 3rd party revenue |  |
| Donations |  |
| Alcohol Sales |  |
| Silent Auction |  |
| Raffles |  |

Total Revenue\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TR\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ - TE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Revenue minus Total of Expenses will give you your net. If you are in the negative, you either need to increase your revenues or decrease your expenses.

**Handling Floats**

Some groups may have no choice but to keep petty cash or a cash ‘float’ readily available to make change for things like bake-sales, ticket sales at the door, or to pay for things like tape, ice, and office supplies. Any money paid out should be replaced with a petty cash voucher made out to that amount. Petty cash vouchers should be signed for by the person taking the money and then authorized by someone else. Always get receipts for any purchases using petty cash. If your group is hosting an event off or on campus-, the group treasurer needs to collect money from sellers. It’s a good idea for collections to be recorded on a summary sheet signed by sellers to confirm the amount of money collected. In certain circumstances, it may not be practical for money to be counted at interim stages during an event; however, keep record of all collections made, evidenced by signatures from both collectors and sellers. Of course, all takings, including floats, should be collected, and recorded from all locations at the end of an event. You can borrow cash boxes from SAMU.