

EVENT PLANNING LESSON

Introduction

Welcome to RSO (Registered Student Organization) event planning!

Maybe you have worked on an event in one capacity or another, as a volunteer or a paid employee. Perhaps you participated in planning your high school prom or a fundraiser. When the event was over you probably thought of steps that could have gone smoother.

The goal of this handbook is to be a resource to help you schedule and run RSO events as smoothly as possible. This document will not be all inclusive, but hopefully it can be used to point you in the right direction for RSO event planning.

RSO events do not just happen by themselves; they should be well planned, specifically orchestrated, and extremely coordinated. Preparation is the key to any successful event. The most important resources you will have when planning RSO events will be the SORC (Student Organization Resource Center) and your SA & I (Student Activities & Involvement) Advisor.

The following common elements will be required in nearly every event you plan:

Vision: The main reason and focus for having the event, a combination of the goals and objectives.

Logistical Plan: An event breakdown with event details and clearly assigned tasks. Should be used to meet the event timelines.

Site Selection: Every event needs a location.

Promotion: Promoting and marketing your event are key to its success. The message could be as simple as the date, time, and location, or it could be more complex material.

Participants/Attendees: The people coming to your event, without them you would not have an event.

Event Organizer: This is the detailed outline with times of the activities. Your organizer should cover everything from hours before the event to clean-up after the event.

Budget: An event budget is a must. Without a budget it is hard to set guidelines and measure results. A budget is also required by SA&I.

Timeline: Objectives must be completed on time in order to accomplish your goals

Food & Beverage: What documents will you need to complete to ensure that catering will be provided?

Transportation: Will you need transportation for the event? Do you have a speaker who needs to get to the event?

Staffing: Will you be checking in participants? Will your event have volunteers? Who will be responsible for the set-up?

It is important that you define what your RSO wants to achieve, what your vision encompasses, and commit your intentions to paper. You do this by defining your goals and objectives, setting financial goals/limits, and identifying your participants. You should begin to envision how the event will look and feel.

The most efficient and effective way to create your defined vision is to hold a planning session with your RSO members and begin generating attainable goals and measurable objectives. After the vision is determined you can create committees, assign roles, responsibilities, and tasks. Time spent planning in the early stages will result in things running smoothly later on. Meet with your SA&I Advisor when you have questions.

What Activities Require Event Planning?

Ultimately, all RSO activities require some event planning. Everything from weekly meetings and practices to large scale conferences, dances and tournaments.

An important step in planning an RSO event is to create the event through Campus Pulse, for your SA&I Advisor to approve. All practices, meetings, and large scale events must be put into Campus Pulse. Once you have created an event on Campus Pulse, a notification will be sent to your SA&I Advisor. The event will not be posted until your Advisor approves it.

RSO meetings and practices do not require meeting with your SA&I Advisor, you can create them on Campus Pulse at any time. Large scale events such as conferences, concerts, tournaments, and dances do require that you meet with your SA&I Advisor to discuss logistics and receive approval once you have created them on Campus Pulse.

Any questions about the event planning and the use of Campus Pulse should be directed to the SORC or your SA&I Advisor.

Meeting with an Event Consultant

Once you have created a large RSO event on Campus Pulse and before you move on to further planning, it is important that you contact the SORC. You will need to set up a meeting with an Event Consultant or ECO to complete an Agreement for Service (AFS). Events will not move forward until you meet with an ECO and work through event details.

ECO's are trained to help you plan your event and follow university guidelines and meet necessary timelines.

You can make an appointment with an ECO by contacting the SORC by phone (413-545-3600) or in person. Your event coordination team and one officer with Signature Responsibility should meet with an ECO before every large event.

When you meet with an ECO you should bring the following items:

1. A budget for the event
2. Three possible locations and dates for the event
3. A list of items you will need to purchase for the event
4. A list of services that you may need, such as catering, security, and AV equipment

SA&I Scheduling Coordinator

The Student Activities and Involvement Scheduling Coordinator is a professional staff member who works with the RSOs and Advisors to schedule space for RSO events.

The Scheduling Coordinator requests space from other departments on campus. The Scheduling Coordinator will be notified automatically of all RSO activities through Campus Pulse.

Once you have created your event through Campus Pulse, a notification will be sent to the Scheduling Coordinator and he/she will contact the necessary department to request the space desired. Once space has been approved or denied the Scheduling Coordinator will notify the RSO and their SA&I Advisor.

The Scheduling Coordinator is available to consult with RSOs who are unsure which space they want, but are interested in finding the best space for their specific needs. You can also meet with an ECO to discuss space needs.

The current SA&I Scheduling Coordinator is Melinda Neilson; you can schedule an appointment with her by contacting the Resource Room at: SA&I@stuaf.umass.edu or 413-545-3600

programming Space on Campus

Space at UMass is in high demand and programming space is limited. This means that RSOs compete for the use of space with other student groups, academic departments, athletic teams, and outside organizations. It is important that you request space as early as possible, and once space is approved you can use it. Cancelling space or not using it can result in loss of the space and/or a fee charged to your RSO.

Catering spaces:

- Marriott Center (11th floor of the Campus Center)
- Amherst Room (10th floor of the Campus Center)
- Campus Center Auditorium
- Student Union Ballroom

Food is always required for events in catering spaces. Eligible events are dinners, banquets, and receptions. Non-refundable deposits are required for holding these spaces.

Cultural Center Spaces:

- Josephine White Eagle Cultural Center
- Latin American Cultural Center
- Malcolm X Cultural Center
- Yuri Kochiyama Cultural Center

Cultural centers are community spaces. While they are available to use for events, meetings and activities, preference is given to groups that are actively part of those cultural communities.

Large Spaces for Banquets and Socials:

- Student Union Ballroom
- Campus Center Auditorium
- Student Union Commonwealth Room (Earthfoods)
- Fine Arts Center Lobby
- Mullins Center Massachusetts Room
- Curry Hicks Cage
- Mullins Center

Large Spaces for Films and Lectures:

- Student Union Ballroom
- Campus Center Auditorium
- Academic Auditoria (ex. Thompson 104)
- Fine Arts Center Concert Hall
- Bowker Auditorium
- Curry Hicks Cage

Smaller Spaces for lectures, Socials, Films:

- Campus Center Meeting Rooms
- Academic Auditoria and Classrooms
- Cape Cod Lounge
- Fine Arts Center Lobby
- Massachusetts Room

Outdoor Spaces:

Outdoor Space includes lawns, such as the Library, Metawampe, and Pond Lawns; residential quad areas and routes for runs, walks, and bicycle races. Athletic fields are considered Athletic Space not Outdoor space.

Sports and Recreation Spaces:

- Boyden Gymnasium
- Boyden Wrestling Room
- Boyden Pool
- Boyden Squash Courts
- Rec Center Gymnasium
- Rec Center Activity Rooms
- Mullins Ice Arena
- Totman Gymnasium
- Totman Pool
- Curry Hicks Cage
- Athletic Field Space:
 - Garber
 - Boyden
 - Gladchuck
 - Football Stadium
 - Southwest Basketball Courts

Expectations When Using University Facilities

Any time an RSO has reserved a facility, it should be used. If an RSO cancels a meeting, practice, game, banquet or any reservation, an officer should contact their SA&I Advisor no later than 24 hours before the reservation is in effect. If the cancellation is a last minute cancellation, your SAI Advisor should still be informed. Failure to use a reserved area may jeopardize the RSO's ability to reserve facility space for future use. **RSOs are responsible for overseeing the set-up and cleanup of all sites.**

Misuse of equipment and facilities, as well as inappropriate conduct and actions while participating in any RSO related activity, may jeopardize the RSOs status. RSOs using a facility are obligated to clean up after the activity and leave the facility in the same conditions it was in when the activity stated.

The SA&I and University staff will be monitoring all facilities when appropriate. As employees of the University they have the authority to deny unauthorized persons or person abusing facilities or equipment access to the facility.

Alcoholic beverages are not permitted in or on University facilities. It is the RSO's responsibility to monitor all events, including spectators, to assure that alcoholic beverages are not on site.

Any violation of University policies may cause events to be delayed until the problem is corrected or cancelled if the situation is not address.

Planning Timeline

Services for events have varying timelines for providing their services. Generally you need to allow 6 weeks from the time you first meet with your SA&I Advisor to the date of your event. Below you will find a timeline for when event planning activities should be completed in relationship to the event date.

No later than 6 weeks from event:

- Create an event on Campus Pulse
- Meet with your SA&I Advisor
- Contracts for performers/vendors submitted

No later than 4 weeks from event:

- Contracts for performers/vendors submitted
- Request space
- Food waivers
- Vendor payments finalized (Purchase Orders)

No later than 2 weeks from event:

- Agreement for Services completed
- Advance the show (contact everyone that is providing a service for your Event)
- Confirm all aspects of event
- Catering finalized

No later than 2 days from event:

- SASP card pick-up

Event Budget

Each event requires different expenditures so there is no set formula for the budget. Walk through the event and write down all costs, taking everything into consideration. The more accurate the numbers are in the beginning, the better the bottom line will be at the end.

When you meet with your SA&I Advisor they will ask you about your budget and the funds that your RSO has in its Fee and Revenue accounts. Your SA&I Advisor will also help you complete the Agreement For Services (AFS) form that is required for on-campus events. The AFS details the dollar amount for each service and the account you want charged. The on-campus department providing the service will directly recharge your account after the event.

Contracts- Guest Speakers, Performers, Etc.

If an RSO wishes to have the services of an outside professional that will be charged to the RSO accounts, a Contract Request for Personal Service must be completed. All paperwork must be completed and submitted prior to service being provided. You may be asked to provide a Certificate of Insurance, if so, see your SA&I Advisor.

To complete a Contract Request, you will need to meet with your SA&I Advisor and provide the following information:

Vendor's personal contact information:

- Vendor name
- Vendor address
- Vendor telephone number
- Vendor email

Event information:

- Event name
- Event date
- Event location
- Payment amount to vendor

RSO information:

- RSO name
- RSO Dept ID
- RSO account and speedkey
- Account balance

Risk Management/Safety/Security

To provide a safe and positive experience for all participants, it is necessary to anticipate situations to prevent accidents and injuries. It is strongly recommended that every RSO develop, implement, and practice risk management procedures. Because every event is different, your SA&I Advisor will go over the specific safety and security requirements when you meet to discuss your event. In many cases you may be required to have UMPD officers, EMTs and/or an outside security company on site.

A few simple things to remember regarding safety are:

- RSO officers, members, advisors, and coaches should emphasize safety during all activities
- Inspect facilities prior to every event. Report unsafe conditions immediately, **do not use facilities that appear unsafe**

- Alcohol is not allowed at RSO events at any time

Safety and security precautions are important for every RSO event. You and your RSO members need to keep in mind that you are representing the University of Massachusetts Amherst and that you will be held responsible for anything that happens at your events. You can find a safety plan outline on Campus Pulse.

Marketing

Marketing and publicity material is imperative to promote your event. The material you create will provide information about the event and how to become a participant. Your material can be a poster, party invitation, full-color brochure, one-page flyer, radio spot, newspaper ad, or all of the above. The one thing you must do is create an event on Campus Pulse. The goal of all marketing should be to get your message out to as many people as possible.

Your marketing cost should be approximately 10% of your budget. It is important that you weigh the benefits of advertising dollars versus memorable amenities. Do you really need the four-page full color brochure or would you rather spend the money on something special for the event? Campus Pulse and word of mouth are the least risky and most effective means of promotion. They are free and require very little time. Every member of your RSO should be involved in publicizing your events.

"Dorm Storming" is not allowed, if you wish to market in residence halls, you must contact Residence Life and they will distribute your material. Any violation of this policy may lead to disciplinary action from the Dean of Students.

After the Event

After every event tying up loose ends and completing any necessary paperwork are important tasks. Debriefing after the event will allow you to meet with everyone involved and review the event. This is also the point where you should make an extensive thank-you list and start showing your appreciation for any help that you received with the event. You should also make sure that all expenses are paid.

After every event you should create a final report for your records. This means consolidating all the event information into one place. You can use this information to track your group's history and for planning future events. The following should be included in your final event organizer and saved in the Documents section of your Campus Pulse page:

- Event name, dates, and location
- Goals and objectives- defined vision for the event
- Number of participants
- A facility report with the number of rooms, food and beverage
- Any conclusions or information from the debriefing meeting (S.W.O.T Analysis - Strengths, Weakness, Opportunities, Threats)
- Copies of all marketing materials

- Copies of all handouts and agendas
- The event timeline and checklists
- Original budget estimate
- Actual budget
- List of all volunteers and staff
- Vendor information, including phone number, key information and if you would use them again
- Copies of all invoices
- Copies of all SA&I paperwork

Student Organization Resource Center (SORC)

The Student Organization Resource Center or "**SORC**" is located in the lower level of the **Student Union Building, Room 208**. The SORC is an office that is dedicated to helping RSOs and their members. RSO mailboxes are located in the SORC, as well as resources necessary for RSO success.

You can schedule appointments with an ECO (Event Consultant) or your SA&I Advisor through the SORC. You can also use the space for small RSO meetings and planning sessions.

Agreement for Services

An Agreement for Services or "AFS" is a document that is sent to all campus partners with the details of your event. This document is used to share information consistently and timely. An AFS should be completed for almost every event. Failure to complete an AFS will mean failure for your event.

To complete an AFS you must meet with an ECO and provide all necessary event details. The ECO will then email the AFS to you and all the necessary campus partners. The AFS will be the only valid document for event details and information not on the AFS will lead to issues with your event.

You should start an AFS 6-8 weeks before your event and a final revision is due 2 weeks before your event.

Event Development Process

Here are the basic steps involved in the Event Development Process:

1. **RSO reviews mission and re-commits to it or revises it, identifies goals for the year.**
2. **RSO develops idea for event which furthers mission and goals.**
3. **RSO meets with advisor to discuss event: budget, logistical plan, marketing plan, and institutional and legal requirements such as food waiver, tent permit, contract.**
4. **RSO submits event request on Campus Pulse according to lead times.**
5. **Advisor reviews request; allows processing of request, or gives feedback on changes needed; may require future meetings.**

6. **At this point the event is still tentative, and all marketing materials must show the venue as “TBA”.**
7. **Scheduling section secures space for event and notifies RSO.**
8. **RSO can put location on promotional materials.**
9. **RSO meets with ECOs in SORC to complete AFS if needed (i.e., event takes place in CC/SU complex, or police or EMTs will be hired), at least 4 weeks before event.**
10. **Event approved on Campus Pulse when all institutional and legal requirements met.**
11. **Full marketing.**
12. **Two weeks prior to event, RSO advances event.**
13. **On day of event group arrives early, with copy of AFS and logistical plan in hand. Each member takes care of their assigned duties to assure the safety and enjoyment of all participants. Group takes responsibility for clean-up of their materials and any excess foreign matter not part of normal custodial duties.**
14. **After event, group meets with ECOs/SAI Advisor to evaluate event and uploads to Campus Pulse any pertinent documents, such as budget, flyers, logistical plan and evaluation, to aid future event coordinators and strengthen the group’s effectiveness.**
15. **Group feeds what they learned into planning future events.**