



Event Planning Workbook

**A guide for RSOs at the
University of Arkansas**

**Office of Student Activities
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www.osa.uark.edu**

An easy, step-by-step guide to plan events at the University of Arkansas and beyond.

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Introduction & Use

Often you hear or have said “Wow, what a great “_____” [you fill in the blank]. However, it is rare for one to take the time and think about the process involved to make an event successful. On the contrary, it is even worse, after you have planned an event, to think about all the “shoulda, coulda, wouldas” not done that could have made your event more meaningful.

This is where our office comes in. We had a request for helpful hints and guidelines for planning successful events. After reflecting on our experiences and doing some research, here is a compiled, quick and easy guide to follow and resources to consider when planning your next event.

Event planning can be as simple or as difficult as you make it. The key terms to remember are the five Ws: Who, What, When, Where, and What Else. These will be used during each step of the planning process.

The Event Planning Workbook (EPW) is to be used as an interactive guide that will walk you through the event planning process. It covers the four stages of event planning: idea conception, planning, the actual event, and follow-up. The EPW also has questions to motivate your thinking and workspace to write your ideas during each step in the process. The EPW basically puts everything within reach of your fingertips.

Good luck and happy planning,

The Office of Student Activities

Idea Conception

Idea Conception is the brainstorming part of the event planning process. When you reach this section, a planning committee should already be established to think through this part logically. During this phase, be open to all ideas and write them down.

Next, go through each idea and weed out the ones that are not feasible. Of the remaining ideas, select the one that is most likely to be planned successfully given the available resources and time. The EPW will lead you through the rest. Remember, the EPW is just a guide and may not include all the nuances that make your situation special. So, keep those things that are pertinent to your event in mind.

Listed below are a few things to stimulate your thinking as you brainstorm for your event.

WHO – Determine your target audience. Who are you trying to reach? Are you trying to appeal to the general public or a particular group of people? What related concepts are more appealing to this group than others? Is it likely that these individuals will support your event? Do your research. Look at other student sponsored events for ideas.

Target Audience:

- specific population
- general public
- university community
- other _____

Related concepts:



WHAT – What is the purpose/goal of the event? Make sure the purpose of the event is important enough to merit the time and expense needed to properly prepare, stage, publicize, and evaluate the event. Are you trying to unify, educate, expose, socialize, support, or entertain? Think about the event and themes that will match your organizational goals i.e. speaker, film, dance, fundraiser, trip, food, festival, athletic event, recreational tournament. Discuss the options with your organization and make a group decision.

Purpose/Goal(s) of Event (list):

How is the event categorized?

- Unity
- Educate
- Expose
- Other _____
- Social
- Support
- Entertain

Reason this event is important enough to merit time, energy, and expense:

Has this idea been done before? Yes No

If yes, how will this event be different/better than the one before it?

If no, is the event idea noteworthy? Does it have the potential to be added to your yearly calendar of events?

Do you have adequate resources i.e. time, money, people, availability, to successfully plan an event? Explain.

WHEN – Consider your time frame. Do you have adequate resources (i.e. time, money, people, availability) to successfully plan an event? Be sure to create a timeline to guide you throughout the process and mark the corresponding deadlines on calendars. The RSO Event Planning Checklist can be used as a guide for the items that need to be done given the adequate timeframe. Using this checklist helps you realize why you need to plan at least two to three months in advance.

What's your timeline?

3 wks

6 wks

2-5 mo

6-9 mo

10-12 mo

Date option(s) for event:

opt 1:

opt 2:

opt 3:

Time option(s) for event:

opt 1:

opt 2:

opt 3:

Proposed Location & Contact Information:

opt 1:

opt 2:

opt 3:

Possible Theme(s):

RSO EVENT PLANNING CHECKLIST

SIX WEEKS OR MORE BEFORE EVENT:

- Develop a master plan and set the event date. Check the Campus Calendar for open dates that suits your group.
- Determine your co-sponsors and invitees.
- Reserve a room and/or facility. Reference RSO Campus Resource List.
- Prepare budget.
- Contact speakers or participants and discuss time, date, place, mode of payment, dietary requirements, travel arrangements, and media venue.
- Schedule an **Event Planning Consultation** with OSA for events in which ASG has funded \$1000 or more. Consultation must take place before submitting budget request to ASG RSO Financial Affairs Committee
- Select menu and order catering. (For Union: Only Chartwell's)
- Apply for ASG Funding.(Check asg.uark.edu for timeline)
- submit budget for approval to sponsoring groups or departments

- Have speakers sign Appearance Agreement release forms. These must be filled out **prior** to the event starting.
- Book travel arrangements and/or send travel reimbursement guidelines to speaker as necessary.
- Establish a publicity plan for the event and order professionally printed materials such as brochures or posters; mail printed invitations. (See Resources.)
- Fill out a Trademark/Licensing form if using U of A trademarks

TWO WEEKS OR MORE BEFORE EVENT:

- Contact facility location to ensure adequate equipment, cleaning supplies, furniture, etc. is available for event.
- Send event notices to media. (See Resources.)
- Send draft of program to speakers.
- Contact University of Arkansas Police Department and/or another security agency to discuss a security assessment if security is deemed necessary for your event.
- Submit fundraising request to OSA if charging a fee for an event or accepting donations.

ONE WEEK BEFORE EVENT:

- Confirm with all participants and vendors; remind speakers to keep boarding passes if they will seek reimbursement from the RSO. (Note: ASG funded events will be paid in advance—no reimbursements given.)

RSO EVENT PLANNING CHECKLIST continued

ONE WEEK BEFORE EVENT continued:

- Prepare name tags, speakers' table tents, and any other materials to be distributed at the event.
- Schedule a media demonstration if media is provided.
- Meet with all involved event staff to discuss logistics for the day of the event.
- Be sure U of A Campus Calendar reflects any changes from the original entry.

DAY(S) BEFORE EVENT:

- Send a reminder e-mail to invitees.
- Buy food, drinks, ice, tablecloths and utensils not supplied by caterer.
- Obtain parking passes for speakers.

DAY OF EVENT:

- Check room to make sure it is clean and holds the necessary equipment and furniture.
- Post directional signs to the room, if event is open to the public.
- Have catering and/or prepared food items in place at least one hour prior to event.
- Place water and a glass at the podium for each speaker.
- If there are pre-event preparation activities, have staff in place at least four hours before the event.

ONE TO TWO WEEKS AFTER EVENT:

- Send the speakers thank-you notes; copy the coordinator of Communication and Outreach on notes to alumni speakers.
- Submit expenses for payment and prepare a list of all expenses incurred for the event.
- Plan follow-up session with staff to discuss event and possible improvements in the process.
- Submit ASG Funded Event Evaluation Form no later than one week after the event to the ASG Office.

Other considerations:

Modified from: Duke Law School Event Planning Checklist
<http://www.law.duke.edu/communityinfo/eventplanning/checklis.pdf>

WHERE – Is the location suitable to the theme of the event? Is it conducive to the activities being held? Can it hold the expected crowd without violating fire code (maximum occupancy)? Is the building accessible to everyone? Is security provided?

As the event draws near, you will get to know the building manager very well. Have him/her provide you a tour of the location and pay close attention to details. S/he will know the exits, exit strategies (in case of emergencies), and locations of: restrooms, electrical outlets, and water sources. Plus, many other important building particulars. Be sure to ask questions!

Listed below are common crowd ranges. Remember there is a big difference within the number range. If you do not have a concrete crowd expectancy, there is a big chance you can have either more or less than you anticipated. In addition, security needs increase with the size of the crowd. Also note that the smaller the crowd, the greater the difference in space.

Expected crowd: _____ Maximum Occupancy: _____ Range of Attendance:

1-10, 15, or 25 25-50 51-75 76-100 100-125 126-150 150-175 176-200
201-225 226-250 251-275 276-300 301-325 326-350 351 +

Is the location:

- Conducive for the activities being held?
- Able to hold the expected crowd without violating fire code?
- Accessible to everyone?

Do you have an alternative location in case this place is no longer available?
Or rain location if the event is outside?

Possible Activities:

Planning

Throughout the planning process, the ideas for the event are likely to expand like a balloon, growing bigger and bigger. Try your best to keep the ideas and planning for the event in check by thinking of its feasibility. The purpose of the planning section of the EPW is to connect the event ideas to the allotted resources i.e. money, people, and other important tangible factors. Whenever possible, put concrete data with the idea or plan—something to make the goal real and keep the ideas within the range of your budget.

WHO – Who are you getting involved to help prepare the event? Are you only thinking about the usual group of people—executive members, club members, etc.? Have you considered collaborating with another RSO? Teaming up with other organizations with similar interests doubles the resources and often saves time and money.

Contact list of RSOs or other community groups with similar interests:

Name	Common Interest
1.	
2.	
3.	

Another thought for consideration is forming a centralized team of people to assist with the planning process. It is always helpful to create committees and subcommittees to delegate and divide tasks. Remember the principal “divide and conquer”.

Proposed list of committees needed:

1.	2.	3.
4.	5.	6.

Also think about the manpower needed to create the vision. What number of volunteers will be needed? Will an outside company need to be hired? Or will a combination of the two be required? Again, develop an achievable timeline to implement the idea.

WHAT – What ideas do you have for an “attention” grabbing, yet relevant title? Get some input and feedback for proposed event names from people that would be interested in attending.

Title Options for Event:

Option 1:

Option 2:

Option 3:

Develop a conceivable timeline to implement the idea and, most importantly of all, **CREATE A BUDGET** or, more accurately, a spending plan. You can only pay for what you can afford and nothing more. Again, seeing numbers on paper provides a tangible limit to keep in mind as you develop your plans. (Reference ASG Budget). Submit your request to ASG as soon as the anticipated costs have been determined. Also, in case of entertainment for the event, an Appearance Agreement form (available in the ASG office) must be completed prior to the event.

Time frame to plan event:

Option 1:

Option 2:

Option 3:

Budgeted Amount to Spend:

\$ _____



Sample Budget Template

RSO Event Budget Ledger

Event: _____ Date of Event: _____
 Event Coordinator: _____ Location: _____
 Target Audience: _____ Event Budget: _____

Budget	Actual	Type of Expense	Notes
PUBLICITY			
\$	\$	Newspaper Ads	
\$	\$	Flyers/Posters	
\$	\$	Table Tents	
\$	\$	Banners	
\$	\$	Printing Costs	
\$	\$	Other:	

OPERATIONS/PRODUCTION			
\$	\$	Facility Rental	
\$	\$	Staffing	
\$	\$	A/V - Sound Equipment	
\$	\$	Decorations	
\$	\$	Other:	

ENTERTAINMENT/SUPPLIES			
\$	\$	Honorarium/Entertainment	
\$	\$	Activity Supplies	
\$	\$	Prizes/Incentives	
\$	\$	Food	
\$	\$	Other:	
\$	\$	Other:	

TOTAL EXPENSES			
\$	\$	FINAL TOTAL EXPENSES	

TOTAL INCOME			
\$	\$	Budget for Event	
\$	\$	Co-Sponsorships	
\$	\$	Admission/Entry Fees	
\$	\$	Final Total Income	

NET STANDING			
\$	\$	Net Standing (total income - total expenses)	

WHEN – Start planning at least two months in advance or as appropriate prior to the proposed event date if you plan to request funds from ASG. (Check asg.uark.edu for timeline).

Check with prominent special event calendars such as University of Arkansas Campus Calendar so there is no conflict with any other major campus or community prescheduled activities that may affect your target audience i.e. midterms, football games, holidays, etc.

Provided below is a sample meeting planning guide.

1st Meeting Scheduled (date & time) (at least 2 months in advance):
Proposed Agenda Items:

Committee Formation

Names of Committees, Committee Chairs, and Contact Numbers:

A.

B.

C.

D.

E.

F.

Committee Agenda Items:

Committee Responsibilities:

2nd Meeting Scheduled (date & time):
Agenda Items:

3rd Meeting Scheduled (date & time):
Agenda Items

Other items for discussion:

WHERE – Locations book fast. Reserve your place as soon as you know the idea and location are feasible. Also, be sure to know the policies regarding the use of campus facilities and other terms of use. Reference the University of Arkansas Student Handbook, *Code of Student Life*, *Student Organizations & Activities*, *Use of University Facilities*. (See Resources).

Event Location:

Contact Details:

Cost:

Other Rental Fees:

Will you need special accommodations? Public event location must be accessible to everyone in order to comply with Americans with Disability Standards, which are enforced by local, state, and federal regulations.

Notes:

WHAT ELSE – What other services will be needed?

- **Equipment.** Are you planning to have music, dancing, or some other form of entertainment? If so, a sound system will be needed and possibly a DJ. These are expenses that will need to be included in the budget since those items are not always provided with the location rental fee. Multimedia equipment and set-up may also be an extra charge. Be sure to note all items covered in your contract and the cost of other available services.
- **Catering.** Are you serving food? If so, talk with a caterer to formulate a menu that would compliment the theme and be within budget. Food costs and availability are easily affected by environmental changes i.e. freeze and increased gas prices. Food and service taxes are also high (currently 11.25%) and must be included in your budget in addition to food costs. **Remember that all events in the Union must be catered by Chartwell's.**
- **Buy in Bulk.** Interested in getting the biggest bang for your buck? Then consider buying food and drinks in bulk rather than individually. For example, a bottle of water is 90¢/per bottle versus free water in two pitchers. Of course free is better and less wasteful since it allows one to pour the amount he/she wants to drink and no more. Another example is a gallon of punch for \$4, (serves 15 people) versus assorted sodas at \$4 per 6 pack (serves 6–8) or 26¢/person vs. 67¢/person. You do the math: more is less.
- **Volunteer.** Another money saving option is to volunteer your staff to assist the caterers if your event requires catering i.e. set-up, waiters, break-down, etc. If this option is available, you will definitely save on the labor costs.
- **Publicity.** Have you formulated a publicity plan? Decide how/when media should be contacted. Are you considering print, electronic, personal, or some other form of publicity? The RSO Publicity Checklist (see Resources) is a great guide to use as you prepare to advertise your event. All the electronic options are free and a great way to spread the word. Also, be sure to take advantage of Twitter and Facebook.
- **Evaluations.** Have measures prepared to evaluate the event i.e. attendance, amount of money raised, number of sign-ups, etc. (Reference The Follow-up: What) Have evaluations prepared for your staff, as well. These will be good tools to use as comparisons during the Follow-Up.
- **Schedule a pre-event (day before/day of event) “tie down”** which should cover all activities that will take place and will help tie up loose ends (final details).

WHAT ELSE cont.

- Trademark Licensing. If your organization is incorporating any symbols or phrases associated with the University of Arkansas to their paraphernalia, then you will need to submit a request of use to Trademark Licensing for approval. In addition, the vendor you plan to use must be licensed through the Collegiate License Commission. For more information visit <http://styleguides.uark.edu/178.php>. Trademark Licensing forms are available in the SIL and can also be accessed through their website. (See Resources).
- Fundraising. When planning a fundraiser or charging a fee for an event, there are a few things to consider. If you are collecting donations and/or a fee for entry, you must fill out a Fundraising form (available in the Office of Student Activities) two weeks prior to the event. Fundraisers may be for philanthropic purposes such as benefiting a non-profit organization(s) but cannot result in profit for individuals. **In addition, RSOs may not use ASG appropriated funds to finance and/or subsidize fundraisers.**
- Security. Security is strongly encouraged with crowds of 100 people or more. The University of Arkansas Police Department (UAPD) is available to assist with security requests for a fee, which averages between \$25-30 per hour (base pay + 10% of base pay). UAPD request that you contact them at least two weeks in advance to assist with security assessments and planning. Be aware that the people per officer count depends on the event, and that outdoor events require more officers than indoor events. Also note that if your event is in violation of the officer requirement, you will be cited and your event will be shut down. The seriousness of this matter requires that security fees be included in your budget. Contact UAPD at 479-575-2222.

Other planning considerations:

The Event

The big day has arrived, and the event is here. Now it's time to see the fruits of your labor. But before the show begins, have one last walk-through with your committees.

Prior to the event or the night before, have a team meeting with the entire committee to cover the logistics for the big day. Then have each committee and subcommittee do final checklists for their groups so that all the fine details are discussed for each group's area.

Hopefully, the day will flow as planned, but in case it does not, always have contingency plans in place and ensure the staff is well aware of these plans. Be certain to have the staff help with the creation of contingency plans to ensure buy-in and to have a broader range of possibilities.

Also, it is beneficial for the main contacts for each group to have a cell phone handy and/or a walkie-talkie available to keep communication lines open before, during, and after the event.

WHO – Have everyone in place at least three to four hours before the start of the event to confirm that all areas are fully staffed. Have each committee member have final day-of-event meetings to cover the logistics of the day.

Set meeting time & place: _____

Points of contact:

Name & cell no. _____

Committee responsibilities:

Name & cell no. _____

Committee responsibilities:

Name & cell no. _____

Committee responsibilities:

Name & cell no. _____

Committee responsibilities:

Name & cell no. _____

Committee responsibilities:

WHAT – Make sure everything is show-ready preferably a day in advance or as early as possible before the start of the event. Show-ready means that all equipment is set up, tables and chairs in place, and/or any other materials are put in “let’s start the show” position.

There are a few things to consider if there is a fee for the event. Make sure you have submitted your fundraising form to the Office of Student Activities notifying them of your fundraiser. If there is a money exchange at the door, make sure that there is plenty of cash ready to break both large and small bills. It is beneficial to have more than one person at the entrance to assist with crowd control and to ease wait time when handling money. Also be aware that all proceeds raised from the event must be deposited into your RSO checking account within a week of your fundraiser.

WHEN – Day before/day of the event, have everyone go through their checklists. Everything does not have to be perfect, but it helps to make sure things run as smoothly as possible.

Checklist thoughts workspace: _____

WHERE – Have special guests arrive early and their certificates and/or thank you gifts ready to go after the presentation. The entertainment for the event needs to arrive early, as well. The performer(s) will need to do a sound check to test the sound system and to get a feel for the venue. Also, all media and technological equipment should be tested day of the event to verify that all needed items are performing as specified.

Guest arrival time:

Number of certificates and/or gifts needed:

Entertainment Arrival time:

WHAT ELSE – Evaluations, Preparations & Planning, & Batteries

When developing the evaluation, consider questions that ask about the event experience: Did you enjoy the event? Did it meet your expectations? Was the location suitable for the activities being held? Other comments and suggestions. Have evaluation forms to rate the event experience ready to hand out prior to the event. Have a clearly designated location available where evaluations are to be returned after the event.

The action really starts once the show begins. All the preparation and planning will be put to the test. It is easy to run around like a chicken with its head cut off so guarantee that your staff knows the plan, their roles within it, and how to properly do their jobs. It's the little things that are overlooked that can spoil the plan. Make sure people know what they are doing so they can do their jobs well. Again, this is where having a detailed list comes in handy. It also helps when people are given tasks that support their areas of expertise.

As stated earlier, it is helpful to have cell phones and walkie-talkies handy throughout the day...so have plenty of charged batteries available.

Also, be sure to have a designated cleaning crew, although it is beneficial to have everyone help with that endeavor. The more people, the better but be certain that the efforts are organized so that the work does not have to be done twice.

Other considerations:



Follow-Up

Now that the event is over, you think that all is finally done and complete...well, not quite yet. There is still a little more work to do. Not to worry—it's for the betterment of the next event.

Often people end the event planning process at the close of the event. But this strategy does not allow for reflection and evaluation of the planning process and for assessment of how the event met the needs of the intended audience. The Follow-Up lets the group discuss the successes, failures, and areas for improvement in the event planning process. In addition, the follow-up allows for recognition of all those that contributed to the event i.e. sponsors, volunteers, and most importantly, the organization.

The initial follow-up should occur as soon as possible — no later than two weeks after the event. You want to have everyone meet while the memories are still fresh in their minds. It would be beneficial to have participants reflect on the process prior to the follow-up discussion meeting. This technique gets members to really think about their experiences throughout the process. Plus, the pre-thought activity adds value to the follow-up discussion and keeps the session moving on a productive path.

There can be multiple follow-up meetings since it can take some time to finalize all expenses associated with the event. Having follow-up dialogue adds closure to the current event and sparks fresh birthing grounds for the next event.

WHO — Acknowledge and thank all parties involved. A hand-written thank you note and/or public recognition of service goes a long way. Be sure to send a thank you letter to all sponsors of gifts, services, and monies. In addition to showing your appreciation, this provides a chance to display how their contributions were used in reaching the group's goal(s) and is likely to secure a sponsorship for future collaborations.

List of sponsors to send "thank you" notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

WHAT — Expenses and Evaluations.

Prepare financial statement of expenses. Save all event related receipts and file them by category of expense. If possible, return all unused items for a refund if the items are of no use to your organization. Review remaining expenses and pay any unpaid debts. Also, be sure to make copies of receipts since the originals are due to ASG for funded events.

Review program evaluations of attendees and committees. Evaluations are vital to the Follow-up process. This is where you see the program through the audience's eyes which allows you to compare the group's expectations of the program to the experience of the audience. The comparison, whether good, bad, or indifferent, is a tool that helps the program to grow. The program evaluations from the audience combined with the program planning evaluations from the staff are powerful resources that help everyone to learn how the experience was, how it could be, and methods to make it better. The gaps can be fixed and/or improved and new ideas can be created with the assistance of the evaluation.

Also, if you received funding from ASG, an ASG Funded Event Evaluation form must be submitted within one week after your event.

WHEN — Hold follow-up meeting to tie up all loose ends as soon as possible. It's a good idea to de-brief with your advisor after any major event.

Proposed date (within 2 week after event):

Agenda Items:

A.

B.

C.

WHERE – Have a follow-up correction of errors discussion and “walk-through” at event location or another designated area.

WHAT ELSE — Take a deep breath. The event is over...now its time to plan for the next one!

Resources

University of Arkansas Campus Calendar
events.uark.edu

University of Arkansas Student Handbook
handbook.uark.edu

Code of Student Life, Student Organizations & Activities, Use of University Facilities.

The following resources are listed on the OSA website for Registered Student Organizations: Event Planning and Publicity Information Portal.

<http://www.osa.uark.edu>

- RSO Publicity Checklist
- Building Reservations Contact List
- RSO Event Planning Checklist
- Fundraising Request
- Trademark Licensing Request
- ASG Funded Event Evaluation form

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