UWM Student Involvement Presents:

Event Planning
Planning, Marketing,
and Budgeting

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Objectives

Today you will learn to:

- ⚙ Build Your Team
- ⚙ Create a Timeline
- ⚙ Set a Budget
- ⚙ Get the Word Out

Things to Know

#1

Event Start Up and Planning Form

Before you start planning, take a look at the Event Start Up and Planning Form in the "Files" section in PantherSync. This form may be required for on-campus events, particularly those with contracts involved. Check with Student Involvement to be sure.

#2

Union Event Services

Located on the first floor of the Union, Event Services is an excellent place to seek event planning advice. Event Services will assist you in finding the right venue and set up, as well as helping to determine cost of any equipment needed.

#3

Student Involvement Liaison

Your Liaison can assist you in event planning and ensuring your Event Start Up and Planning Form is completed correctly. They work to help make sure your event is successful.

Build Your Team

Planning an event is hard work and requires a team effort. Your first step should be to determine who is going to be a part of the event planning team. Here are some examples of roles to be filled:

Event Manager: Oversees the entire event and keeps the team on track.

Communications and Marketing: Responsible for getting the word out through advertising on and off campus and via social media.

Logistics: Handles the event venue and ensures that all day of needs are met, from large items such as sound equipment, to small items such as pens for email sign ups.

Funding and Sponsorships: Manages the budget for the event and assists in determining where funding will come from.

Volunteer Coordinator: Recruits and supervises all volunteers that are staffing an event.

Step 2

Create a Timeline

Once you have your team assembled, work together to create a realistic timeline for your event.

*Work backwards from the proposed date of the event. This ensures that you have enough time and gives you a big picture view.

*Small events take up to 3 months to plan, while larger events range from 6 months to 1 year or longer.

*Remember to factor in how much time it will take to secure funding, reserve rooms, and handle contracts.

See one example of a possible timeline on the next slide

Program Title:
Date/Time/Location:

Early Stages – 3+ Months Prior

- ☐ Plan for how you can make the event as inclusive as possible

- ☐ Reserve the space/location. Include the following details:
  - ☐ Location – 2 options
  - ☐ Date/Start-Time & End-Time
  - ☐ Type of Event – Conference, Speaker, Dance, Band, Movie, etc.
  - ☐ Narrative of event specifics/schedule
  - ☐ Number of participants expected
  - ☐ Targeted audience – campus, community, or both
  - ☐ Technical equipment needs
  - ☐ Additional resources needs (chairs, tables, etc.)
  - ☐ Complete contract(s) (if contracting a performer/speaker)
  - ☐ Create an inspiration document with design ideas for promotion
  - ☐ _____
  - ☐ _____

Six Weeks Prior

- ☐ Develop publicity timeline
- ☐ Schedule promotion tables
- ☐ Order any food needed from vending services
- ☐ Create a supply checklist for your event
- ☐ Develop a list of items that need to be purchased
- ☐ Reserve transportation and hotels if needed for presenters
- ☐ _____
- ☐ _____

Four Weeks Prior

- ☐ Confirm all audio, visual, and technical equipment required
- ☐ Confirm space arrangement details with appropriate campus office
- ☐ Seating or space set-up information
- ☐ Number of tables and chairs needed
- ☐ Other (podium, dance floor, special accommodations, etc.)
- ☐ Print banners/posters and other promotional materials
- ☐ Set up event registration
- ☐ _____
- ☐ _____

Three Weeks Prior

- ☐ Determine accessibility needs and accommodations
- ☐ Determine volunteer needs and create sign-up
- ☐ Publicity (according to your timeline)
- ☐ Determine how to assess participants (paper survey, follow-up email survey, comment box, etc.)
- ☐ Test card swipe for attendance (if applicable) or create attendance tracking sheet
- ☐ Arrange for ticket sales (if applicable)
- ☐ Create event program (if applicable)
- ☐ _____
- ☐ _____

Two Weeks Prior

- ☐ Create the "Day of the Event" Form
- ☐ Hold final planning meetings with all involved in the event (Planning Committee, Vendors/Contractors, Day-of Volunteers)
- ☐ Publicity (according to your timeline)
- ☐ Print liability waivers (if needed)
- ☐ Print event signage
- ☐ Gather all event supplies and materials
- ☐ _____
- ☐ _____

Week of & Day of:

- ☐ Send confirmation emails to all involved in the event (Planning Committee, Vendors/Contractors, Day-of Volunteers)
- ☐ Publicity (according to timeline)
- ☐ Refer to the Day of Event Details Form
- ☐ _____
- ☐ _____

Post Event:

- ☐ Clean up and put away all event supplies and materials (event space, office, etc.)
- ☐ Assess participants
- ☐ Complete program evaluation (as individuals and/or as group)
- ☐ Send thank you notes to all day-of volunteers and program planners
- ☐ Schedule wrap-up meeting with all members of the planning committee (if applicable)
- ☐ _____

Sample Timeline

This is just one way to create a timeline

Setting a Budget

Brainstorm your event needs to ensure that you are covering all things small and large.

- List items you think you will need, from pens to sound equipment.

- Give each item a priority level from "Must Pay" to "Would Be Nice."

- Determine where the money to purchase each item will come from: SAC grants, fundraising, membership fees, etc.

Item	Priority (Must Pay, High Priority to Pay, Would Be Nice, Low Priority)	Budget Source
Example One: Speaker Fees for lecturer	Must Pay	SAC Grants
Example Two: Replace organization table banner	Would Be Nice	Profits from fundraising

Step 4

Marketing the Event

Create a comprehensive plan that is sure to reach your audience.

* Determine your target audience

* Decide how you will reach that audience (Flyers, Posters, Social Media, PantherSync, word of mouth, etc.)

* Use available resources such as Union Marketing, Student Involvement, and Advisors

* Delegate tasks and decide when each piece of marketing will go out

Contact Union Marketing markdesk@uwm.edu. They'll help with event promotional design and content development for social media, advertisements, press, and strategic marketing.

Marketing the Event

Here is an example of how to keep track of your marketing.

Don't forget to consider cost for each type of publicity.

Marketing and Promotion Checklist

(Note: not all items may apply to every event)

Include on all publicity: Sponsor Name, Date, Time, Location, and Price!

Target Audience: _____

Minimum Marketing

Publicity	Person Responsible	Date Assigned	Date Completed
POSTERS			
Submit a design request to Union Marketing or design yourself			
Distribution			
Flyers			
Submit a design request to Union Marketing or design yourself			
Distribution			
OTHER			
Digital Signage (on large screens on campus)			
Word of mouth!			
PantherSync Event			
Twitter			
Facebook			
Snapchat			
Instagram			
Email			

After You Have Your Timeline, Budget, and Marketing Details :

- Double check your plan for any errors or missing items. ✔✔

- Run your plan by your advisor or Student Involvement Liason. They may have suggestions that will help.

- Start looking ahead to the day of the event. Check out 3rd event planning video for more information.

- Finally, remember to plan some downtime before and after the event to recharge. Go into the event with a full tank of energy!

Visit the Student Involvement website for more event planning tools: uwm.edu/studentinvolvement
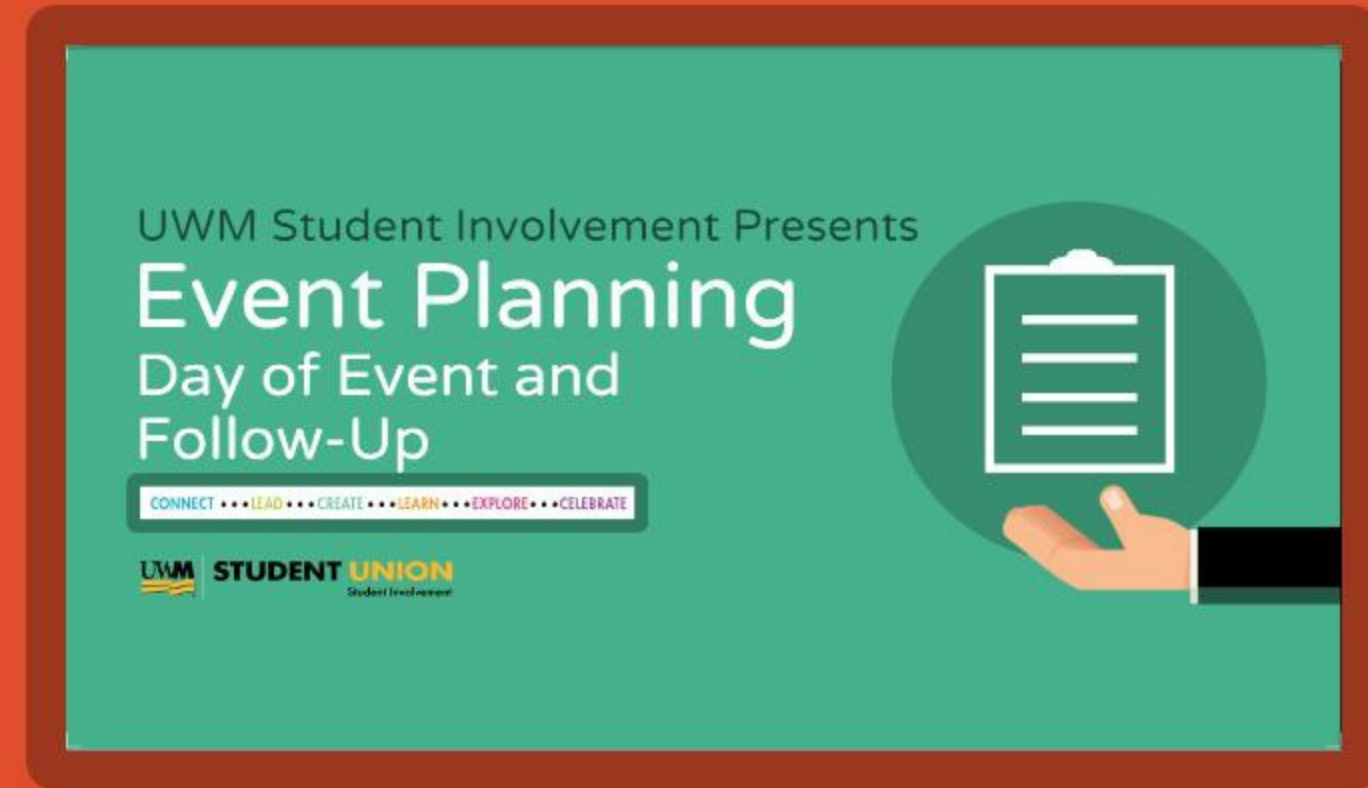
Student Involvement Resources

For more tools and resources on a wide variety of topics visit the Student Involvement Website:
 uwm.edu/studentinvolvement

OR

Visit PantherSync and check out the resources in the 'Files' section under 'All Student Organization Resources'

All Student Organization Resources
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