

Student Organization Event Planning Folder

Event Name: _____

Date: _____

Location: _____

Sponsors: _____

Event Lead: _____

Lead Phone: _____

Folder Checklist

- Purpose statement
- Copies of agreements
- Printed communications
- Marketing samples
- Agreements & contracts
- Copies of evaluation

Expense Record

	Amount Budgeted	Actual Expenses
Promotion Budget:		
Flyers # ___ x \$ ___ =	\$ _____	\$ _____
Table Tents # ___ x \$ ___ =	\$ _____	\$ _____
Posters # ___ x \$ ___ =	\$ _____	\$ _____
Banner Board Supplies =	\$ _____	\$ _____
Display Case Supplies =	\$ _____	\$ _____
_____ =	\$ _____	\$ _____
Production Budget:		
Shipping/Postage	\$ _____	\$ _____
Awards	\$ _____	\$ _____
Food Service	\$ _____	\$ _____
Photography & Recording	\$ _____	\$ _____
Tickets	\$ _____	\$ _____
Performer Travel/Lodging	\$ _____	\$ _____
Contract Fee	\$ _____	\$ _____
Rentals	\$ _____	\$ _____
Tickets	\$ _____	\$ _____
Decoration	\$ _____	\$ _____
_____	\$ _____	\$ _____
Total Expenditures		\$ _____
Ticket Income	# ___ x \$ ___ =	\$ _____
Other Income	# ___ x \$ ___ =	\$ _____

Event Planning Checklist

<u>Assignment</u>	<u>Date</u>	<u>Point Person</u>
<input type="checkbox"/> Reserve facilities	_____	_____
<input type="checkbox"/> Recruit volunteers	_____	_____
<input type="checkbox"/> Co-sponsorships	_____	_____
<input type="checkbox"/> Performance contracts	_____	_____
<input type="checkbox"/> Publicity	_____	_____
<input type="checkbox"/> Identify target audience	_____	_____
<input type="checkbox"/> Posters designed/printed	_____	_____
<input type="checkbox"/> New release	_____	_____
<input type="checkbox"/> Local newspaper ads	_____	_____
<input type="checkbox"/> Banner boards	_____	_____
<input type="checkbox"/> Table tents	_____	_____
<input type="checkbox"/> Social media marketing	_____	_____
<input type="checkbox"/> Social media postings	_____	_____
<input type="checkbox"/> Technical support	_____	_____
<input type="checkbox"/> Room setup	_____	_____
<input type="checkbox"/> Audio visual needs	_____	_____
<input type="checkbox"/> Advance w/ facility staff	_____	_____
<input type="checkbox"/> Make arrangements	_____	_____
<input type="checkbox"/> Purchase supplies	_____	_____
<input type="checkbox"/> Travel	_____	_____
<input type="checkbox"/> ID scanner	_____	_____
<input type="checkbox"/> Registration	_____	_____
<input type="checkbox"/> Miscellaneous	_____	_____
<input type="checkbox"/> _____	_____	_____
<input type="checkbox"/> Thank you cards	_____	_____
<input type="checkbox"/> Complete evaluation	_____	_____
<input type="checkbox"/> Recognize volunteers	_____	_____

UWM Offices & Resources

Student Involvement Business Office
 Union 351, 414-229-5780, si-busoffice@uwm.edu,
<https://uwm.edu/studentinvolvement/>

- SAC grant expenditures
- Contracts-Paid and Unpaid

Union Event Services
 Union 300, 414-229-4828, reservat@uwm.edu,
<https://uwm.edu/union/event-services/>

- Reserve Union room & tables/booths, classrooms, green spaces, and Spaight's Plaza
- Tickets for events (purchase and no cost)
- Food sales and distributions

Marketing Services
 Union WG50, 414-229-5538, markdesk@uwm.edu,
<https://uwm.edu/union/event-services/>

- Plan marketing
- Design and production of marketing media including social media images
- Reservations for posting on campus such as Union banners, window clings, monitors, etc.

20/20 Catering
 Union 321, 414-229-3733, 2020-catering@uwm.edu,
<https://uwm.edu/dining/options/catering/>

- Catering Services required in the Union, available campus-wide
- Exception to Catering Request process

Student Involvement
 Union 351, 414-229-5780, csidesk@uwm.edu,
<https://uwm.edu/studentinvolvement/>

- Event Planning & Registration
- Event Planning Advising
- Contracts for guests (paid and unpaid)

Campus Police
 Non-Emergency Line: 414-229-4627,
 Emergency Line: 414-229-9911
 Email on website: <https://uwm.edu/police/>

- Event Planning for security issues
- Safety issues at an event on-campus

Transportation Services
 (414) 229-4000, uwmpark@uwm.edu,
<https://uwm.edu/transportation/>

- Guest Parking

Risk Management
 (414) 229-6339, riskmgt@uwm.edu,
<https://uwm.edu/risk-management/>

- Event Planning risk assessment and management plans
- Waivers
- Certificate of Insurance requirements

Timetable

8+ Weeks Before Event

- Check availability of desired space and equipment.
- Confirm date, time, place and compensation.
- Establish budget plan for event.
- Establish a publicity plan.
- Review and develop an understanding of the sign up, registration, cash policy, and any other relevant policies, regulations, or laws.

7 Weeks Before Event

- Complete agreements with sponsor, presenters, etc.
- Arrange for compensation, if any.
- Arrange for advance ticket sales/registrations, if any.
- Begin implementing the publicity plan.
- Confirm room and equipment needs with Event Services.

6 Weeks Before Event

- Continue to implement publicity plan.
- Post any promotional flyers and social media posts.
- Revise budget as actual costs become known.
- Complete agreements, sponsorship, etc. as agreed.

5 Weeks Before Event

- Continue to implement publicity plan.
- Revise budget as actual costs become known.

4 Weeks Before Event

- Continue to implement publicity plan.
- Revise budget as actual costs become known.
- Check that all university paperwork has been completed and is being processed (bills/invoices being forwarded for payment).
- Order promotional and other printed material that will be needed.

3 Weeks Before Event

- Continue to implement publicity plan.
- Revise budget as actual costs become known.
- Send press releases and social media posts.
- Check advance sign-ups, if any.
- Confirm that the publicity plan is on time and within budget. Plan any last minute publicity that may be needed

2 Weeks Before Event

- Continue to implement publicity plan.
- Revise budget as actual costs become known.
- Implement last minute publicity.
- "Walk through" the event and double-check that everything has been arranged and requested.
- Arrange for staffing of the event as needed.
- Distribute printed publicity material.

Week of the Event

- Publicity plan completed.
- Budget revision completed
- Last-minute publicity completed.
- Be available for the unexpected.
- Final arrangements and double-checks on all aspects of the event are completed.
- Make arrangements to meet the performer, speaker, guests, etc. on arrival.

Day of the Event

- Final arrangements and double-checks on all remaining aspects of the event are completed.
- Check all arrangements early. If a change is needed, you will need time to make or request it.
- Be available for the unexpected.
- Meet and greet the participants, presenters, etc. upon arrival.

Follow-up One Week After the Event

- Thank you letters to all involved, including both groups and individuals.
- Clip and save any press coverage and other publicity
- Make final actual budget and pay all remaining bills.
- Write an evaluation of the event, outlining your process, recommendations for the future, and final budget.

