

FRANKLIN & MARSHALL COLLEGE

Event Planning: Step by Step

Pre Event Planning: Brain Storming

- a. What event would you like to have? _____
- b. When and where would you like to have your event? _____
- c. What would it take to make your event the best? _____
- d. What materials would you need for your event? _____
- e. How much would you estimate it will cost to put on your event? _____
- f. How many club members would it take to run your event? _____

You now know what you want your event to be, have answered all of the above questions, and are ready to begin your planning below!

Create a Budget.... Talk with your Club's Treasurer

- o How much was your club allocated for said event: \$ _____
- o Think about the following expenses:

Food/ Catering	\$ _____
Decorations	\$ _____
Supplies	\$ _____
Performer Fee	\$ _____
Transportation	\$ _____
Marketing/ Advertising	\$ _____
Total Event Cost	\$ _____
- o Will there be a fee to attend or participate in your event?
 - If yes, how much are you charging? \$ _____
 - How many people do you anticipate will attend? _____
 - Will you be tabling or conducting pre-registration? _____
 - Is the admission/participation fee being donated or will it be used to cover the cost of the event?

- o Note: **ALWAYS** make sure your clubs budget is fiscally able to support the event you are trying to have before you start ordering or contracting for your event

List Materials Needed

- o Think about all of the materials you might need, but don't necessarily have to pay or budget for
 - Technical needs from ITS or the place you are looking to reserve: _____

 - Tables and chairs from SWAT or the place you are looking to reserve: _____

 - Any other materials needed? _____

Make Reservations

- Where will the event take place? _____
- What date will the event take place? _____
- Is there a rain date? _____
- What time will the event take place? _____ AM/PM to _____ AM/PM
- Submit the “[Register Students Events](#)” form at least two weeks before your event if possible to ensure your reservation for the space will be approved
- Make sure to include those materials you need for the location you are reserving
 - Example: If your event is in the atrium of the SCC, you might request the stage, a microphone, an aux cord, and 50 chairs set up OR if your event is on Hartman Green you might be looking for 5 rectangular tables, 20 chairs, and a stage

Submit a SWAT or ITS Work Request if needed

- SWAT/ Event Services Work Request
 - Submit this at least two weeks before your event if possible to ensure you are able to get everything you are requesting
 - Copy and paste what you listed in your reservation for your SWAT needs
 - Make sure to be very specific!
 - Be aware that SWAT may have to contact an outside vendor to get what you have requested, which comes with a fee
 - Fill out your request for your event here: <https://repairs.fandm.edu/helpdesk/WebObjects/Helpdesk.woa>
- ITS Work Request
 - Submit this at least two weeks before your event if possible to ensure you are able to get everything you are requesting <https://helpdesk.fandm.edu/helpdesk/WebObjects/Helpdesk.woa>
 - Copy and paste what you listed in your reservation for your ITS needs so you don't forget!
 - Make sure to be very specific!
 - If you need a speaker, microphone, computer, DVD player
 - Who will be responsible for picking up, using, and returning the equipment? _____
 - Make sure whoever will be operating the equipment knows how to actually operate the equipment
 - Call or stop by ITS to make your request for your event

Tabling

- Make sure to reserve your table!
 - If you are reserving one for the SCC, make sure you put the attendance as 2 people, otherwise the table will not show up; only 2 people max can sit at a table at one time
 - If you are tabling and need a change fund/ cash box make sure to fill out this form: https://jfe.qualtrics.com/form/SV_ey9T2d4Z4Y2TtpX

Dealing with Performer or Vendor Contracts

- Are you working with a performer: comedian, DJ, speaker, food truck, outside company? _____
_____ If so, you will be working with a contract.
- NEVER sign a contract that has not been approved by the College
- Ask the vendor for a copy of the contract they have and their W-9

- Note: You might need to make up a contract. Not to worry, you can visit this website <http://www.fandm.edu/finance-administration/purchasing-and-contracts> and use a premade College contract template
- Get in touch with someone in the Office of Student Engagement & Leadership <http://www.fandm.edu/osel/contracts> to look over the contract and send it where it needs to be sent contracts@fandm.edu and or riskmanagement@fandm.edu

Begin to Leave A Record

- Use your club's Google Drive Folder
 - Create a Folder for the Event
 - Place all of your receipts, marketing/ advertising materials, contracts, reservation confirmations, copies of waivers, etc. in the folder

Waivers!

- Does your event have any inherent risk? _____
- Is there transportation involved? _____
- If you answered yes to the either of the above questions, you will need to and have your participants' complete waivers; to protect the students who come to participate, your club, and the College
- Waivers can be found here: <http://www.fandm.edu/insurance>
 - Unsure of which waiver to use? Check in with someone in the Office of Student Engagement & Leadership or the Office of Compliance & Risk Management and they will be happy to help!

Marketing/ Adverting

- You want to make sure that all of the hard work you have put into making your event a success continues, by getting people to show up to your event!
- You can use social media, make a banner, posters, chalk, etc.
 - Banners and posters must have the date, time, location, and email of a contact person for the event
 - Chalk can be taken out from the Office of Student Engagement & Leadership
- Who is making posters and or a banner? _____
- Who is responsible for advertising on Social Media? _____

Payment & Reimbursement

- You've spent a lot of time planning your event, but don't forget to make sure you are sticking to your budget!
- If a member of your club bought something for the event and needs to be reimbursed, send them to the 2nd floor of the SCC with their receipt(s) and the Office of Student Engagement & Leadership, Office Coordinator will gladly help them be reimbursed
- If you are looking to pay an outside vendor or performer; once your contract comes back as being approved and the W-9 has been submitted to the business office the payment process can begin
 - Please visit the Office of Student Engagement and Leadership to start this process
 - All paperwork for checks to be cut must be in by the Thursday before noon in order to have the check to be issued by the following Thursday at 4:30 pm.
 - Your check for the vendor or performer can be picked up from the Business Office before your event or it can be mailed after your vendor once the event is completed
 - Check to see how the vendor or performer would like to be paid
- Note you should ***NEVER*** pay a performer or vendor before services are rendered

Gather Members & Volunteers

- How many people do you need to help? _____
- Will there be shifts set up? _____
- Make sure your volunteers or members helping to run the event know what is expected of them
- They also need to know when and where to show up
- Hold them accountable!

Your Event is Completed! Congratulations you have completed a successful event!

Evaluate

- Make sure to evaluate your event, figure out what you could have done better or what you did well to remember for next time
- Fill out this form to evaluate your event: _____
https://fandm.co1.qualtrics.com/SE/?SID=SV_2ajjL3k6J2zPHlr

Thank People Who Helped

- Chances are you didn't do this all on your own, so reach out those who helped and let them know you couldn't have done this event without them!
- Send them an email or write them a thank you note!

Leave A Record

- Use your club's Google Drive Folder
 - Create a Folder for the Event
 - Place all of your receipts, marketing/ advertising materials, contracts, reservation confirmations, event evaluation, etc. in the folder
- Leave this as resource for whomever comes after you and wants to plan a similar event to the one you just successfully planned

