



SA's event planning guide:

This is a very basic and generic guide on how to plan an event as a SA club. Every event is different, and most will require actions that are unique to the event. However, this should give a basic outline of the steps needed to get started. At any point, you can schedule a meeting with the SA Entertainment Event Planners and they will help you out.

Every event will vary, but typically you will need at least 8 weeks to properly plan and execute a large club event. Below is a Generic Timeline of what you will probably need to accomplish.

First Month				Second Month			
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
M T W Th F Sa S	M T W Th F Sa S	M T W Th F Sa S	M T W Th F Sa S	M T W Th F Sa S	M T W Th F Sa S	M T W Th F Sa S	M T W Th F Sa S
1 2 3 4 5 6 7 8	9 10 11 12 13 14 15 16	17 18 19 20 21 22 23 24	25 26 27 28 29 30	1 2 3 4 5 6 7 8	9 10 11 12 13 14 15 16	17 18 19 20 21 22 23 24	
Develop event goals & objectives							
Req. venue dates							
Contact vendors for quotes							
Create/Refine: Operations Plan, Schedule, Check-list							
Submit contracts for review		Estimated contract review process time (2 week minimum, can be longer)					
Budget & request funds		Estimated fund request process time (2 week minimum, can be longer)					
Submit major requests (Insurance, Alcohol, Transportation, Security, Promo, etc)				Requests are processed			
Setup ticket request		Ticket office processes request		Tickets onsale			
Create Marketing Plan & Materials			Promote the Event				
							EVENT DATE
							Assemble AAR

Develop Event Goal and Objectives: The very first step is to establish tangible goals and objectives. (e.g., why are you organizing this event and what do you hope to achieve?)

- a. Who is the audience?
- b. Why does the club want to hold this event?
- c. How large will the audience be?

Budget, Quotes & Request funds: The first step is to create a budget and see if the club can afford to host the envisioned event.

- a. Reach out to SA, the campus service providers and the vendors that are needed to accomplish the event, including:
 - Activity Vendors (Inflatables, face painters, photo-booths, etc.)
 - Artists/Performers
 - Caterer
 - Requesting SA Resources such as:
 - [Booking Flights](#)
 - [Bussing](#)
 - Insurance
 - [Photo/Video documentation of the event](#)
 - [Promote the event on the SA Website](#)
 - [Van Rentals](#)
 - [SA Production \(Sound/Stage/Lights/etc.\)](#)
 - Security
 - Venue
 - Any other vendors necessary
- b. Explain to these vendors the vision the club has for this event and they will provide you with quotes. Put together a basic budget ([sample budget link](#)), and see if the club has sufficient funds to accomplish these goals.
- c. Make sure that all of the vendors accept “[Direct Billing NET-30](#)” terms from SA. This is a normal method of payment in the business world. It refers to a vendor giving SA an invoice directly following the event, and SA pays this invoice within 30 days of receipt.
- d. Our Finance and Entertainment department can help you find vendors that we use regularly for basic event resources
- e. When you speak with the vendors, work out a few viable dates for the event.

- f. Assume an additional 15% in miscellaneous unknown costs in the budget, in case something changes. Never budget down to the last dollar in the club account.
- g. Request all of the Funds through [SAFE](#). No other requests (contract reviews, alcohol requests, insurance requests, etc.) will be approved before you submit a request in [SAFE](#).

Request Date & Space: Once the budget is viable, settle on a date that works for the vendors, venue and the club.

- a. Request that date from the venue.
 - If the venue is outside of the University, they may issue you a contract. We prefer that all artists, performers, vendors and other contracted entities use our form contracts. Please try to negotiate this.
 - All contracts will need to be reviewed through the [SA Website Contract Review system](#).
- b. The date might already be pre-set for a reoccurring event, but if this is a new event, be sure to consider the following before firming up the event date:
 - **Give everyone involved enough time!** Ideally, you should have 2-3 months to plan (depending on the nature of the event)
 - Be aware of statutory and religious holidays
 - Avoid school break time periods (e.g., winter, spring and summer breaks)

Request all of the event's needs:

Once a date and budget are set, it's time to start submitting request(s) for support.

SA provides a wide variety of resources to assist clubs. SA is available to contribute in the planning process, arranging logistics and providing information about how to best accomplish the goals for this event. These resources include but are not limited to arranging for transportation, insurance, promotional assistance, production materials and security arrangements to name a few.

The SA Website has online forms to handle all of the major requests:

- [Booking Flights](#)
- [Bussing](#)
- [Photo/Video documentation of the event](#)
- [Promote the event](#)
- [Van Rentals](#)

Submit these requests with ATLEAST 2-3 weeks to process them, this should be 6 weeks prior to the event. This will allow you plenty of time to promote your event and distribute tickets.

Any requests that have a cost associated with it, must have a request for funds submitted in [SAFE](#). If you have all of the information necessary to submit a request, there is no reason to wait. The earlier you submit, the better off the club will be.

Brand the Event: There are always dozens of events happening at UB, you need to make this one stand out. Choose an original theme that sets this event apart from the competition.

- A unique name that catches people's attention is always a good idea.
- Contact our SA Media/Marketing department and they will help you create a marketing plan, graphics, social media and any other promotional needs you may have.
- Make sure you get marketing started at least 4 weeks before the event date.






Create a Master Operations Plan:

- This plan should encompass all aspects of the event, including:
 - Venue, logistics & catering management (contracts, permits, insurance, etc.)
 - Speakers/presenters (identifying, confirming, logistics & management)
 - Activities/entertainment
 - Publicity/promotion (online & off-line, e.g.: web page & online promotion; events calendars; printed programs; media relations; signage; social media, etc.)
 - Ticketing info
 - Sponsor/partner management
 - Volunteer management
- This plan will help you:
 - Stay on top of all of the different aspects of the event logistics
 - Delegate responsibilities
- Ensure that substitute club members can take over if you are unable to get to the event for one reason or another.
 - [Template Operating Plan](#)
 - [Sample Checklist download](#)

Determine Evaluation Process:

- How will you determine if the event is a success? Do you measure success by the number of registrants or attendees or is it dependent on you breaking even or raising a target amount of money for the club?
- Did the event accomplish the goals you set forth when you planned the event in the first place?
- What notes will you leave for the next planner of this event? How could it have been better? What worked well?
- We highly recommend clubs fill out an After Action Report to document the things that went well as well as those items that can improve in the future. This document will serve to inform future club members during their planning process as well. You can [download an AAR Template here](#).

You can click these links to download the tools you need:

1. [Event Planning Guide \(this document\)](#) 
2. [Example Budget](#) 
3. [Template Schedule \(DOS\)](#) 
4. [Template Operating Plan](#) 
5. [Event Checklist](#) 
6. [AAR Template](#) 