

EVENT PLANNING/PROJECT MANAGEMENT

Modified from a presentation by

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The planning cycle has 5 stages.

1. **Assess the needs:** Assessment is a means of assisting the committee in determining the needs of those for whom the program is planned. "The best way to have a good idea is to have lots of good ideas." Brainstorm. Ask yourselves, "**Why** are we going to do this?"
2. **Goals and Objectives:** Goals- the direction to go. Objectives - the means to achieve. Ask yourselves, "**What** is the overall purpose of doing this program?"
3. **Program Plans:**
Ask yourselves, "**How** am I going to do this?"
 - A. **TIME, DATE**
 1. Does this event conflict with other campus activities? If it does, is that OK or not OK?
 2. Does this event conflict with other major community events? Is that OK or not OK?
 3. Is this time convenient for the intended audience?
 4. Is the date convenient for the intended audience?
 5. How long should the event last?
 - B. **PHYSICAL ARRANGEMENTS**
 1. What room or area should be used? Consider size, location, and access to bathrooms, noise, how many people will be attending, other factors, etc.
 2. Has the facility been reserved? Don't forget to plan for set-up and breakdown time. Check with the facilities scheduling office at your college to determine proper timelines and procedures. **Requests should typically be submitted at least 2 weeks before your event.**
 3. Have the maintenance arrangements been made? Attach a room diagram of your set-up when necessary.
 4. What equipment will be needed at the event? Consider chairs, tables, trash cans, audio-visual equipment, cashbox, etc....
 5. Has any necessary audio-visual equipment or event taping been arranged for with the Media Department? Has the proper paper work been turned in and approved?
 6. If you want a cashbox, have you made arrangements for it with the Fiscal Office?
 7. If food is needed, have you made arrangements with the campus food service provider and initiated the proper paperwork? Consider not just the food, but serving dishes, punchbowls, plates, napkins, cups, utensils, etc....
*For luncheons, meetings, and any other time college money will be used to buy food for consumption (not resale), an **Official Function Form** must be completed.
 8. What decorations are needed, if any? Who will buy or make them, when will they be put up and taken down?
 9. Has a school vehicle been arranged for, if needed? Have the appropriate forms been filled out and approvals been received?
 10. Have you coordinated your plans with the Student Life and Leadership Office and Campus Safety? They will need to know which rooms and areas you will be using, when you need rooms unlocked (don't forget to plan for set-up time), when you need the rooms locked

again, which bathrooms should be opened, where event participants will be parking (if applicable), how many people you are expecting.

*The **Facilities Request Form** will take care of much of the reservations for the above needs, but it is important to double check or confirm with the individual offices as well to ensure a successful event.

C. PUBLICITY, INFORMATION

1. What audience are you marketing the event to? What methods are best for reaching the audience?
2. Have flyers, posters and other materials been designed? Who, what, where, why, and how much -- include the important facts in your materials. *Note that all publicity should contain the College and MCCCDC logos, especially on external publicity. The Student Life Office or Institutional Advancement departments can review your materials for appropriate use of the logos.
3. Have invitations been printed and mailed out in a timely manner? If inviting administrators such as board members, the college President, Vice Presidents or Deans, they often need at least a month notice to attend.
4. Has the information been given to the Institutional Advancement department for inclusion in the faculty and staff publications, for the website or a news release?
5. Has the information been given to Media Services for inclusion on the campus televisions (if available)?
6. Has the information been given to the switchboard operator, the information center, the Student Life Center and other offices on campus that may be asked questions about the event?
7. Has a memo been sent to teachers for classroom announcements?

D. FINANCIAL

1. What is the budget for the event? Consider guest speaker fees, decorations, refreshments, publicity, printing costs, etc.
2. Who will pay for the event? Are the sources of funding firm?
3. Will there be an admission fee?
4. Have Requisitions, Official Function Forms and Petty Cash forms been filled out, coded to the proper budget, and approved?
Note: Fiscal forms must be turned in a minimum of 2 weeks in advance.
5. Have Contract for Professional Service forms been filled out, signed and approved (see the Fiscal Agent to determine if this is necessary for your contracted service or performance)? Several weeks of lead-time are required for contracts. This form is required for most DJ's, speakers, bands, etc.
6. Have Certificates of Insurance been requested from the vendors? Note: Certificates of Insurance are required from most vendors/people/services coming on campus. The Student Life Office, Facilities Scheduling Office, and the Fiscal Office work together to determine if a certificate of insurance is needed. The certificate is needed prior to the event. Your event may be postponed/cancelled if an insurance certificate is not received. To determine the risk associated with your activity, complete the MIRA Smart Tool on the MCCCDC Risk Management website.

E. PEOPLE, ASSIGNMENTS, APPROVALS

1. Has someone been put in charge of each of the major tasks? Consider decorations, publicity, finances, equipment, clean-up, etc....
2. Have chaperones (advisors) been arranged for, if needed? Do they know what times they are needed and what their responsibilities are?
3. Have the necessary campus departments been notified? Have all arrangements been coordinated?

4. Has the Student Life and Leadership Office been notified of all arrangements and given approval as applicable?

4. Implementation of Plans

- A. Follow through. Follow through. Follow through.
- B. Back up plans. Identify problems as they arise and the cause.
- C. Brainstorm alternatives and select the best solution.

5. After the Event/Evaluation

- A. Has cash been counted and turned into the Cashier's Office?
- B. Has the room/area been cleaned-up?
- C. Has the audio-visual equipment been returned?
- D. Have all borrowed items been returned?
- E. Have bands, guest speakers, and other contracted people or services been paid?
- F. Have thank you notes been sent to appropriate people?
- G. Have you written a press release describing the event and submitted it to the Marketing department for publication on the website, newsletters, etc.?
- H. Has the event been evaluated -- what went right, what went wrong, what should be changed for next time? Has a written summary been left in your files to make planning easier next time?

I. Accountability

- 1. Was each participant aware of his or her obligation to the organization?
- 2. Did each individual know the specific tasks for which he was accountable?
- 3. Have the participants kept their agreements as to their obligations?
- 4. Have the participants developed skills to follow a task through to completion?
- 5. Was the original goal met?

J. Consequences - Beyond the immediate goals of this activity.

Consequences will arise which may or may not be desirable, but which will be the inevitable results of your actions and will be directly tied to the quality of work you have dedicated to the project.

Positive

Good feelings, future support
Positive social change
Respect for commitment made
Campus connection improved
Campus involvement increased
Total success
Increase in school spirit
Awareness of what works

Negative

Disappointment
Inability to meet goal
Inability to keep one's word
Buck passing
Laying blame on others
Loss of trust, respect
Loss of reputation



Event Planning Worksheet

Activity: _____

1. Assess the needs: Assessment is a means of assisting the committee in determining the needs of those for whom the program is planned. The best way to have a good idea is to have lots of good ideas. Brainstorm. Desired Results:

2. Goals and Objectives: Goals - the direction to go. Objectives - the means to achieve. "What's the purpose of having this activity/program?"

3. Program Plans: including details, problems and alternatives, and a planning diary.

Time, Date: _____

Physical Arrangements: _____

Publicity, Marketing: _____

Financial, Resources: _____

People, Assignments, Approvals: _____

Accountability: _____

Consequences: _____

Problems/ Alternative Solutions: _____

Keep a Planning Diary of when tasks are began and completed. This will help separate the tasks according to months, weeks, or days for future reference.

4. Program Evaluation:

