

Event Planning Checklist

Organization/Committee: _____

Event: _____ Location: _____

Admission: _____ Day, Date, Time: _____

Planning Phase:

- _____ Set goals/purpose for event (Education, Entertainment, Edutainment)
 - Set specific and general goals/purposes & target audience-bring to next meeting
- _____ Assess technical needs, request rider early if possible
 - Learn all additional expenses event will have
- _____ Set attendance expectations
- _____ Check room availability
- _____ Check sound capabilities
- _____ Check other campus events
 - Campus Calendar: <http://events.muohio.edu/>
 - Check w/ other groups (Greek Affairs, ASG, CAC, PB, AfterDark, etc.)
- _____ Check holidays (national, religious, etc.)
 - Holidays by religion, nation, etc: <http://www.earthcalendar.net/index.php>
- _____ Discuss event with agent
 - Get information for pricing, including flight, hotel, sound, etc.
 - Check available dates for event/performer, compare to our availability
- _____ Breakdown and prepare budget worksheet for next executive board meeting
- _____ Meet with Advisor/President

Contract Signing:

- _____ Discuss event again with agent.
 - Confirm earlier details
 - Discuss technical concerns if any
 - Book event if desired
- _____ Review Miami Contracting Manual
- _____ Review Processes for Student Organization Events Contracts (Attached)
- _____ Bring contract to 356 Shriver (Student Activities) for processing
- _____ *** IMPORTANT: Students CANNOT Sign Contracts**
- _____ Fill out Event Planning Form in 356 Shriver Center
- _____ Confirm room reservation (secure rain location if outdoors)
- _____ Submit for noise abatement (if needed)
- _____ Contact Bobbe Burke 9-2268
- _____ Submit event to e-calendar (<http://events.muohio.edu/>)
- _____ Attach Leadership Values Rider when returning signed contract to agent
- _____ Meet with Advisor/President

Six Weeks:

- _____ Contract must be received by this point at latest
- _____ Promotions ideas discussed
 - (Marketing): Flyers, posters, table tents, etc.
 - (Communication)-Press Release to media outlets
 - What are we doing creative to advertise? How will it stand out? See Marketing Checklist
 - Paul Allen most approve all clothing or memorabilia**
- _____ Reserve dressing rooms/supplemental space

Four Weeks:

- _____ Meet with Building Point-of-Contact about rider requirements
- _____ Marketing blitz should start.
- _____ Have at least 3 people proofread all advertising

- _____ Reserve transportation
- _____ Reserve hotel
 - (check Marcum, Climer, Best Western for Miami rate)
- _____ Review contract & Rider, make sure every detail taken care of
- _____ Plan hospitality
 - Meals (Gail King, 9-4524 for on-campus)
- _____ Order parking passes needed for performer
- _____ (*Finance*) Process payment
 - Mark "Hold for Pick-up" if you plan to pick-up payment and give to performer post performance
- _____ Fill out/Get Signed Co-Sponsorship Agreement (if necessary)
- _____ Tell building point-of-contact exact start and end times
- _____ Meet with Advisor/President

Two-Three Weeks:

- _____ Confirm room set-up with building point-of-contact
- _____ Confirm payment sent to Accounts Payable
- _____ Confirm travel arrangements
- _____ All advertising out
- _____ Confirm hospitality
- _____ Meet with Advisor/President

Day of Event (Pre-Event):

- _____ Room set-up
 - Know times, be there
- _____ Show up at event 1 hour before to confirm everything is set correctly
 - Are all needs taken care of? Tables, chairs, projector, sound, etc.?
- _____ GREET THE PERFORMER!
 - Make sure someone meets the performer at the door!
- _____ Pick up checks from Accounts Payable (107 RDBSH)
 - Business Hours 8-4:30 M-F
 - Weekend events, pick up check on Friday

Day of Event (Post Event):

- _____ Room tear-down
 - When the event is over, make it look like we were never there.
 - Clean up all trash, help w/ chairs if needed

Post Event:

- _____ Thank you notes/letters/cards sent
 - Agent
 - Performer
 - Shriver Staff
 - Sound/Light Company
 - Anyone else that went above and beyond to help
- _____ Fill out post event evaluation form (on SAL Website)
- _____ Send letter of recommendation to performer/agent (if worthy)

Budget Worksheet

Organization/Committee: _____

Event: _____ Location: _____

Admission: _____ Day, Date, Time: _____

Performer Fee: \$ _____ Transportation: \$ _____ Lodging: \$ _____

Meals: \$ _____ Tech Needs: \$ _____ Publicity: \$ _____

Hospitality: \$ _____ Water: \$ _____ Misc: \$ _____

TOTAL BUDGET: \$ _____

Income:

Ticket Sales (est.): \$ _____ Co-Sponsor: \$ _____

ASG Funding Est.: \$ _____ Other: \$ _____

Est. Income: \$ _____

Est. Total Cost: _____

Est. Attendance*: _____

Est. Price Per Person: _____

**Please fill this form out to the best of your ability! Be realistic, not idealistic. If 100 people should show, say that...if 2000, say that. Remember, the attendance estimate you give is your goal we want you to achieve!*

Marketing Checklist

(Which will work for YOUR event?)

- | | | | |
|--------------------------|--|--------------------------|----------------------------|
| <input type="checkbox"/> | Posters | <input type="checkbox"/> | Amusement Calendar |
| | Academic Buildings | <input type="checkbox"/> | Student Calendar |
| | Residence Halls (give to
Res Life Office) | <input type="checkbox"/> | events.muohio.edu Calendar |
| | Administrative Buildings | <input type="checkbox"/> | Bookmarks |
| | Recreational Buildings | <input type="checkbox"/> | Newsletters |
| | Local Businesses | <input type="checkbox"/> | E-mail lists/list-servs |
| <input type="checkbox"/> | Flyers | <input type="checkbox"/> | Puppies/babies |
| | Academic Buildings | <input type="checkbox"/> | Easels w/ Foam Board |
| | Residence Halls (give to
Res Life Office) | <input type="checkbox"/> | Organization Mailboxes |
| | Administrative Buildings | <input type="checkbox"/> | _____ |
| | Recreational Buildings | <input type="checkbox"/> | _____ |
| | Local Businesses | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | Table Tents | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | Coffee Sleeves | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | Pizza Boxes | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | A-Frames (need special
permission) | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | Shriver Showcase | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | Sheet Banners | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | 3-D Promo Items | <input type="checkbox"/> | _____ |
| | Stand-ups | <input type="checkbox"/> | _____ |
| | Cut-outs | <input type="checkbox"/> | _____ |
| | Show Related Items | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | 3-D "Gimmick" Handouts | <input type="checkbox"/> | _____ |
| | Stress Balls | <input type="checkbox"/> | _____ |
| | T-Shirts | <input type="checkbox"/> | _____ |
| | Others (in catalogues) | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | Hub/Slant Walk/Shriver Rally | | |
| <input type="checkbox"/> | Channel 17 Commercial | | |
| <input type="checkbox"/> | Shriver Plasma Screens | | |
| <input type="checkbox"/> | WMSR | | |
| <input type="checkbox"/> | Amusement/MQ/Student Ad | | |
| <input type="checkbox"/> | Amusement/MQ/Student Article | | |
| <input type="checkbox"/> | Tri-Pod Displays | | |
| <input type="checkbox"/> | MiamiBuddy1809 | | |
| <input type="checkbox"/> | Facebook Groups | | |
| <input type="checkbox"/> | Facebook Ads | | |
| <input type="checkbox"/> | Organization Website | | |
| <input type="checkbox"/> | Door Hangers | | |
| <input type="checkbox"/> | Stick Signs | | |
| <input type="checkbox"/> | Miami Student Insert | | |
| <input type="checkbox"/> | Press Release | | |

Spaces provided so you can be creative and come up with your own innovative PR ideas (i.e. Rent a costume, walk on stilts, get in a staged fight, etc.)

Co-Sponsorship Agreement

Program Name:

Event Date:

Event Time:

Location:

Total Cost of Event:

Program Description:

Primary Sponsor:

Address:

City: State: Zip:

Phone:

Account #:

Co-Sponsor:

Address:

City: State: Zip:

Phone:

Account #:

Primary Sponsor Responsibilities:

Co-Sponsor Responsibilities:

We have read and agree to the conditions listed above regarding this co-sponsorship. We understand that as the official representatives of our organization, we are responsible for meeting the criteria listed above and for any payments or reimbursements involved. At least one representative (student or advisor) must sign this agreement.

Primary Sponsor Representative: _____ Date: _____

Primary Sponsor Advisor: _____ Date: _____

Co-Sponsor Representative: _____ Date: _____

Co-Sponsor Advisor: _____ Date: _____

Post Event Evaluation

Organization/Committee: _____
Event: _____ Location: _____
Admission cost: _____ Day, Date, Time: _____
Co-Sponsors: _____
Pre-Event Estimated Attendance: _____ Actual Attendance: _____

Description of program:

Goals of program:

Were these goals met? (Explain)

Resources Used:

Equipment: _____
Supplies: _____
People: _____

Assessment:

	Poor	Fair	Good	Very Good	Excellent
Quality of Presenter/Performer	1	2	3	4	5
Cooperation of Presenter/Performer	1	2	3	4	5
Publicity	1	2	3	4	5
Set-Up	1	2	3	4	5
Clean-up	1	2	3	4	5
Audience Reaction	1	2	3	4	5
Planning Process	1	2	3	4	5
Overall Evaluation	1	2	3	4	5

What could have been done to improve the quality of the program?

Should this program be repeated? Why or why not?

List specific problems, frustrations, or concerns:

Person preparing the evaluation: _____ Date: _____

Contract Instructions for Student Organizations

First, and most important, **no student may sign a contract**. If a student signs a contract, that student is financially liable to pay for the fees in the contract. All contracts have a routing procedure that must be followed. Below is an outline of the procedure.

The typical contract procedure takes 3-4 weeks, but including processing of payment can take as much as six weeks. Because of this we encourage students to take advantage of the Event Planning Checklist (available in the resources section of the Student Activities & Leadership website) and plan ahead.

The Office of Student Activities & Leadership also has a blank contract that may be edited and used if the speaker/vendor/performer/etc. you are using does not provide a contract. This may also be downloaded in the resources section of the Student Activities & Leadership website. The rules and regulations for contracting for the university are also available online.

The student organization accounting code must be present with sufficient funds to cover the request. If the present fund balance does not cover the cost of the contract, an explanation of anticipated funding sources must be included. The space for the performance must be reserved before the contract is processed.

The following steps should be taken for all contracts for student organizations.

- ___ Contract Reviewed by the Office of Student Activities & Leadership (Shriver Center)
- ___ Contract Reviewed by Building Point of Contract/Physical Facilities (if necessary)
(If space reserved through registrar's office, a print-out of reservation confirmation should be attached)
- ___ Contract Reviewed by Miami University Police Department (if necessary)
- ___ Contract Reviewed by Division of Student Affairs (Warfield Hall)
- ___ (if performer/speaker/etc.) Contract Reviewed by David Creamer in Finance & Business Services
- ___ (if service/purchase/etc.) Contract Reviewed by Bill Shawver in Purchasing

After all signatures are present on the routing form, the student organization is responsible for contacting the artist/company to finalize the contract and initiating payment for the services.