University of Windsor

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Introduction

Event planning is a wonderful way to introduce and connect students to the University of Windsor community. Whether your events are educational, academic or merely an excuse to get together for a social soiree, we encourage you to utilize this Event Planning Guide for Students during the entire event planning process.

The planning and implementation of successful events is often one of the most daunting challenges faced by student leaders each year. Given the myriad of variables that may contribute to the success or failure of any given event, we understand the difficulties and obstacles that you will face. This guide to event planning is designed to provide student event planners with some suggestions and best practices that will help you plan safe, responsible and inclusive events. We hope that it will serve as an invaluable resource as you embark upon your journey as a student leader!

Please note that all events must follow university policies and be approved in order to ensure that risks are appropriately managed and insurance coverage is in place. The protocols and requirements for events are outlined in the "Event Planning Protocol for Students".

Events must also be accessible. For more information, visit the website for the Office of Human Rights, Equity & Accessibility for A Planning Guide for Accessible Conferences: How to Organize an Inclusive and Accessible Event.

Planning for On-Campus Events

- Ensure that you have received the necessary mandatory approvals to hold your event and that adequate and appropriate insurance coverage is in place
- Create a reasonable and realistic budget
- Book your room and organize your room set-up with Catering Services (ext. 3276 or ext. 3277)

- Alcohol service is available through Catering Services (ext. 3276 or ext. 3277). Events with alcohol require that you contact Campus Community Police (ext. 1234) to determine appropriate event support (e.g. off-duty officers)
- Book your audio visual needs with IT Services
- Advertise your event to the rest of the group and membership
- Ensure that you have sufficient staff and/or volunteers (1:20 ratio)
- Ensure that all applicable university policies and procedures are followed

Planning for Off-Campus Events

- Ensure that you have received the necessary mandatory approvals to hold your event and that adequate and appropriate insurance coverage is in place
- Book the venue and organize your room set-up with the Off Campus Vendor
- Create a reasonable and realistic budget
- Book your transportation in advance and coordinate the necessary waiver forms, bus monitor and line monitor contracts
- Advertise your event to the rest of the group and membership
- Ensure that you have sufficient staff and/or volunteers (1:20 ratio)
- Ensure that all applicable university policies and procedures are followed

Dry Events

Due to the complex nature of alcoholic events and the significant number of students who are not of legal age, we encourage dry events. There are many possibilities for events that do not involve alcohol. You may contact the Student Alcohol Education Coordinator through Campus Community Police to discuss options, but some possibilities are outlined below:

- Bowling and Billiards Night
- Pizza Social
- Faculty and Staff Meet & Greet
- Ultimate Frisbee
- Haunted Hike
- Scavenger Hunt
- Winter Carnival
- Music Ensemble
- Karaoke Night
- Board Game or Computer Game Tournament
- Indoor/Outdoor Movie Night
- Grape Juice & Cheese Night
- Society vs. Society Competition
- Mini Olympics
- Amateur Photo/Art Show
- Luau Night
- Group Fitness Class

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However, even if you are opting to serve alcohol at your event (and are therefore following the required steps as outlined in the Student Event Protocol, keep in mind that a large number of people may choose NOT to drink alcohol, so alternative beverages should be available when alcohol is served. Examples include Virgin Daiquiris, Smoothies, Fruit Juices, Coffee/Tea, Bottled Water, Fruit Punches or Hot Chocolate.

Six Steps to a Successful Event

Step One: Needs Assessment
Asking yourself questions is a great way to determine what would most benefit your students. Are there any issues which are currently affecting my students? What are the needs, wants or concerns of my students? Then, using your answers to these questions, develop the goals and objectives you wish to accomplish with your event.

Step Two: Idea Formulation
Now that you know what you want to achieve, how do you select an event?
- Brainstorm ideas; write down everything you can think of
- Evaluate your ideas
- Don't forget the KISS Principle - "Keep It Simple Silly!"
- Remember to take into account the following factors:

- time	- permits/licenses
- money	- facilities and equipment
- supplies and resources	- what your students want
- scheduling	- risk assessment
- accessibility requirements	- security (if required)

Step Three: Event Planning
All events require a lot of organization. Be sure to ask the following questions:
- Who is involved?
- What is needed/required for this event?
- Where will the event be?
- When will it happen?
- How are you going to promote the event?
- Are there any policies or requirements that need to be adhered to?

Tip: *Plan out when you want to do your events early. If your event requires booking of facilities (internal or external to the university), book early!! There is no such thing as being too early with a facility request. Use the event programming plan (see appendix) to assist you in organizing your year/semester. This is a great way to manage your time and stay on track. Talk to members of your group or someone in student life to get suggestions and ideas. They are a great resource!*

Step Four: Publicity
This is one of the more important aspects of event planning. If you tell them they will come! Be creative to grab their attention! Think about social media, word of mouth and posters/banners/flyers. Be original and don't forget to let your team know!

Posters/banners/flyers should include:
- name of event
- day, date and time
- location
- who is running/sponsoring the event
- cost involved (if any)
- who is invited to attend
- accessibility symbol

Tip: Remember to double check all applicable policies on advertising and posters to make sure that you don't violate any!

Step Five: Event Implementation
Here are a few details to consider when getting your event ready to go. The countdown has begun ...
- Book the room and equipment in advance and confirm everything the day before
- Prepare the set-up and physical arrangements early. Don't wait for your audience to arrive
- Remember to plan for possible problems that may arise
- Have the appropriate number of trained staff and volunteers in attendance to help combat any potential problems
- Always be prepared for a large number of people
- Enjoy yourself!

Step Six: Follow Up/Evaluation
After every event, it is important to review what was successful and what could have been improved upon. Evaluating your events will only make you a better event planner. Remember, you aren't finished until you tie up all the loose ends! Here are some helpful hints:
- Clean up after the event, and return any borrowed materials/equipment
- Remove advertisements promptly from all campus areas where they have been posted
- Complete a final budget and pay any outstanding bills
- Complete an event evaluation (see appendix) to add to your file for future reference. Good evaluations help with future events!
- Complete an incident form to document any situations that occurred
- Submit all signed waivers, incident forms, contracts, etc. to the appropriate reporting authority
- Encourage honest feedback from the participants and/or presenters
- Get feedback from your executive, student group and members of other groups
- Be encouraged by all events - they are all learning experiences
- Thank all helpers and guests in writing

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Event Timelines

The following timelines are your guide to successful event planning. This is an invaluable resource to help you remain on track as well as ensure crucial details are not forgotten.

Task	Target Date	Person Responsible	Status
• Sit down as a group/executive to set goals for the year or the semester • Brainstorm various event ideas • Decide what events the group will run according to the funds available • Determine tentative event dates, times, locations and budget allocations (See Appendix A for a Budget Worksheet) • Contact staff advisors or student union reps to get feedback, assistance and keep lines of communication open • Keep group members informed of all event planning progress	Beginning of year/semester		
• Determine who the event will target (residence, off campus, etc.) • Select room/venue for event and book • Follow event approval process (see Event Planning Protocol for Students) • Determine event staff requirements (may include Campus Community Police) • Create a checklist of required items, supplies and equipment • Get quotes for any needed materials • Create a preliminary detailed budget • Determine how you will promote and advertise the event • Determine your power/electrical needs and make arrangements • Request donations or sponsorships	4 weeks before event		
• Ensure event approval has been received before continuing with planning • Arrange for transportation if required • Select food/beverages to be served • Order any items, supplies and equipment • Decide and produce publicity materials	3 weeks before event		

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Task	Target Date	Person Responsible	Status
• Request licenses/permits if required • Review and sign any vendor contracts • Review emergency procedures			
• Begin advertising and promotion • Send out invitations to all guests and group members • Begin ticket sales if required • Confirm the room/venue and set-up • Inform the media of event if applicable • Conduct a site check of the location • Determine the maximum capacity of the location • Identify all fire exits/fire equipment • Ensure a first-aid kit will be on site • Request Campus Community Police Officers if required • Organize security protocols with Campus Community Police (eg. entry/exit procedures) • Prepare any necessary waiver forms as designated through the approval process • Make rain or back-up plans	2 weeks before event		
• Finalize all event details • Finalize the number of people attending the event • Hire or recruit staff and volunteers to assist with the event • Conduct a training session for all staff and volunteers (including all bus and line monitors) • Confirm that all supplies were ordered and will arrive on time • Create a guest list for the event	One week before event		
• Purchase any last minute items • Organize supplies for the event (including any required cash float, tickets, etc.) • Ensure that staff and volunteers know what time to arrive • Create visible signage for entrance	Day before event		

Event Day Checklist

- ☐ The Primary Organizer should be first person there and the last person to leave
- ☐ Arrive a few hours before the doors open (depending on the set-up required)
- ☐ Pick-up, set-up and test all equipment
- ☐ Complete all set-up/decorating arrangements
- ☐ Have all volunteers and staff arrive early to sign any necessary contracts and waivers (these should remain with the Primary Organizer)
- ☐ Assign duties to each person, and make sure that everyone is aware of their responsibilities and where they should be located
- ☐ Establish a system of communication between all event staff
- ☐ Ensure that you know where all of the fire exits are located
- ☐ Ensure that all event staff are highly visible (red/yellow/orange t-shirts work best)
- ☐ Meet the guest speaker or performer if any (be prepared to introduce them)
- ☐ Conduct a final safety check of the room/venue before the doors open
- ☐ Have some incident forms on hand
- ☐ RELAX and HAVE FUN!!

Budgeting Tips

The success of your group's events can often depend on its ability to budget effectively. Long-term planning and some thrifty spending will help make sure that your group is able to host more events than ever before. Groups are encouraged to use the sample budget worksheet (see appendix) to keep track of funds spent and stay under budget.

- Make sure the event has been approved before you start spending
- Create a separate budget for each event
- Look at past budgets if available
- Try to share resources with other groups when possible
- Keep and itemize all receipts
- Have one person in charge of the budget
- Fundraise and request funds from various campus organizations
- Consider charging a small entry fee to help lower costs
- Always set aside some money for miscellaneous or emergency expenses
- Reconcile your account each week to prevent financial errors

Food Guidelines

If your event is being held on campus and involves food, you must work with Catering Services (ext. 3276 or ext. 3277).

Emergency Procedures

There is a chance that if something can go wrong, it most likely will. Event planners who keep this in mind are usually the most prepared and best equipped to handle any situation that may arise. If an event has been well planned, and staff/volunteers are familiar with safety and security procedures, you should be able to run and implement the safest event possible.

Following are some procedures to handle potential situations and emergencies you may come across during an event. In the event of any emergency or need for First Aid, contact Campus Community Police at x1234 and the Student Medical Response Team at x3940. Visit http://www.uwindsor.ca/safety/fspspecialevents for Emergency Evacuation procedures.

PRE-EVENT PROCEDURES
Prior to any event, precautionary measures that should be taken include:
- Review the fire regulation and building capacity policies for the event location
- Check the event site to ensure it is fully accessible
- Obtain a cellular phone and distribute the number to all event staff
- Design a means of communications for all staff – utilize headsets if possible to remain in constant contact
- Hold a training session for all staff/volunteers before their shift, reviewing the entry/exit points, safety equipment, and emergency procedures
- Create a rotation schedule for all security persons, ensuring staff have been assigned to all areas of the venue
- Place staff in strategic areas so they can quickly respond to all situations
- Ensure staff persons are dressed so they are clearly visible
- Conduct a final venue check before the doors open to ensure everything is ready

ENTRANCE PROCEDURES
To ensure a smooth entry process for event participants:
- Stagger event entry and use barricades to avoid areas of high congestion
- Arrange for adequate entry areas to prevent long lines
- Utilize good signage outside the venue to indicate the doors that are accessible
- At least 2 line monitors should supervise the entry line into the event, to keep the line calm and orderly
- Door staff should work in pairs, with one person checking Identification Cards/wristbands, and the other taking tickets and admission fees
- One staff person should keep track of the number of people within the venue, to ensure attendance does not exceed building or room capacity
- Once capacity has been reached, stop admitting people immediately
- Ensure the entrance is accessible for all participants, keeping in mind various accessibility requirements and needs (e.g. wheelchair access)

MEDICAL EMERGENCIES

A medical emergency can include everything from a bloody nose to a seizure. It is a good idea to have a First Aid Kit on site and to contact the Student Medical Response Team to see if they are available. In the event a situation arises:

- Assess the situation to determine what needs to be done
- Contact Campus Community Police to activate the Student Medical Response Team and an ambulance
- Bring the injured person to an isolated area for treatment
- Keep them calm and get all of the details surrounding the incident
- Have staff members coordinate crowd control
- Be prepared to evacuate the venue if circumstances warrant

CROWD CONTROL

It is important, especially when planning large events that crowd control strategies are devised to maintain control of the event and the environment.

- Event staff should rotate throughout the venue, especially within areas that hold large numbers of people
- Event staff should be located at each exit point, to keep track of the number of people that have left the event
- Exit staff should inform the entrance staff about how many people can be admitted into the event, to keep the flow of event participants relatively stable
- If staff cannot safely supervise a large number of guests, door staff should wait until the crowd thins before more people are able to enter
- Having numerous concession stands can prevent long lines and congestion problems

FIRE AND FIRE HAZARDS

Event staff should be able to identify and respond to fire or safety hazards. Should a fire occur, people will look to you and your staff for assistance.

- Before the event, staff should know where fire alarms, exits and equipment are located
- Event staff should be assigned specific duties (e.g. crowd control) and know what to do in the event of an emergency
- If smoking is prohibited within the venue, be alert for people smoking or throwing cigarettes into trash cans
- If a fire is detected, pull the nearest fire alarm and start evacuating the area
- Staff should ensure that all patrons have left the area safely
- Keep people away from the fire and clear an access route for fire personnel
- Keep people calm and ensure medical attention is provided for those who need it
- Speak to the Police and Fire Personnel regarding all event details

EXCESSIVE/UNDER-AGE DRINKING

Certain protocols must be followed if your event includes alcohol (refer to Event Planning Protocol for Students). The risk level for an event always increases when alcohol is involved, as people are more apt to engage in unsafe behaviour. All alcohol must be served by the University of Windsor. Contact Catering Services at ext. 3277 should you wish to host an event involving the service of alcohol.

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- Staff should keep an eye on dangerous areas such as stairs, balconies or hallways
- Bartenders and servers must be employees of the University of Windsor and will be Smart Serve trained and know how to detect intoxication and what quantities of alcohol can be legally served to event participants
- Individuals that display signs of intoxication will be cut off immediately
- If an event is all-ages, a wristband policy indicating those of age and those under-age must be implemented and monitored
- All staff should monitor the behaviour of all attendees
- Event planners must abide by the provincial liquor laws when planning events with alcohol

POOR WEATHER CONDITIONS
Wind, rain, snow or sun can adversely affect the success of your event, as people often cannot withstand the elements for very long and the weather is one of the hardest things to predict or control.
- Check the Weather Report prior to any outdoor event
- Arrange for an alternate indoor venue if required
- Always ensure water is available when holding an outdoor event during warm weather
- Shaded areas should be created for those who want to get out of the sun
- Minimize sun time by holding the event later in the day or for shorter time periods
- Remember that people often won't notice heat/sun stroke until it hits them

ALTERCATIONS
Altercations can always occur, especially when an event is quite large and alcohol is being served.
- Look to your team for support to diplomatically handle the situation
- Don't be condescending or aggressive. Hostility will only make the situation worse
- If you feel uncomfortable in any situation, ask for help or contact Campus Community Police
- Give someone a chance to stop what they are doing, forgive and forget, or sober up
- Individuals who continue to be a problem should be ejected (Campus Community Police should remove the person causing the altercation from the area)

EJECTION PROCEDURES
Ejecting event patrons should only be done by Campus Community Police and only as a last resort, as per below.
- Do not hesitate to ask Campus Community Police to eject belligerent, insulting, threatening, or hostile individuals
- Ask the person to leave on their own. If they refuse, ask Campus Community Police to eject them (this should be done quickly and quietly)
- Report the time and description of the person ejected to the door staff and the primary organizer

POST-EVENT PROCEDURES
Responsibility for event participants does not cease once they have left the event venue. Injuries or damages that occur after the event has concluded can become the responsibility of the student group and event staff. To protect the safety of event participants, you can:

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- Contact Walksafe to walk students home or to their cars
- Call taxicabs or arrange for transportation after the event
- Campus Community Police should be located outside the event to prevent any damages and the consumption of the alcohol outside the event venue
- Complete an Incident Report for any major/minor circumstances that occurred
- Report all outstanding event details to a staff/student advisor
- Submit waivers if you were directed to do so through the event approval process

RISK MANAGEMENT FACTORS

ALL EVENTS
- Volunteer ratios should be 1:20 depending on the nature of the event.
- Consider the community surroundings. For instance, what are the city by-laws or campus rules with regard to noise? This is important to consider if you are in a building or using the grounds around a building, especially residence buildings.
- Does your event conflict with any other mandatory event or holiday?
- Have you used the correct language on your posters and other means of advertising? Is your advertising discriminatory?
- Are your safety and security plans clearly outlined?
- Is your event inclusive and accessible? For more information, see A Planning Guide for Accessible Conferences: How to Organize an Inclusive and Accessible Event
- Have you planned appropriately for your target group of participants?
- Is your event conflicting with any laws of the land, objectives of the university or by-laws within your organization?
- Have you accounted for where you are to safely store all cash on site and how to keep an inventory of product or tickets being sold?
- Have you accounted for the elements of nature such as long exposure in the sun, wet slippery conditions or thunder/lightning storms?

WATER EVENTS
- Are the games/activities to be performed clearly outlined?
- How will you ensure that water guns are filled up using water only?
- Is there going to be a mass amount of water in one area that could lead to injuries, horseplay or electrical concerns?
- Are there any areas that could be damaged by the use of water, such as computers, documents, etc?
- Does your event run the risk of personal property being jeopardized, such as clothing, books, etc?
- Have you arranged for the Student Medical Response Team to be present?
- Where is your water source coming from, and who has access to it?
- Have you clearly outlined boundary lines where water can and cannot be used?

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SCAVENGER HUNTS
- Do you have a list of items to be found? Has this list been approved by the appropriate people?
- Is the list appropriate? i.e. no stealing
- Have you set parameters for the event as well as a timeline?
- Do you have a group leader?

FOOD EVENTS
- Have you worked with Catering Services if your event is on-campus and carefully read the Student Food Event Policy presented on the Catering website?
- Did you plan for enough food per person?
- Have you considered all dietary needs? (vegetarians, vegans, allergies)
- If you are having a fundraising barbeque, have you applied to the Board of Health for a permit, received a permit and presented it to Catering Services for final approval?
- Do you have all of the proper equipment for safe food handling so that the rules set out by the Board of Health are being followed?
- Have you cleaned up the extra waste and garbage from the event site?

PHYSICAL ACTIVITIES
- Have you recruited volunteers with First Aid training and/or contacted the Student Medical Response Team?
- Have you provided, signed and collected all waivers?
- Have you provided food and refreshments for participants?

OFF CAMPUS EVENTS
- Has transportation been arranged?
- Do you have 2 bus monitors per bus? Have you provided appropriate training to all of the bus monitors?
- Do you have barricades for loading the bus for trips with over 200 people?
- Have you checked to ensure no one is boarding the bus with alcohol?
- Have you clearly stated to people that upon request, their bags can be checked to view their contents?
- Have you provided, signed and collected all waivers?
- Is alcohol accessible at the event? Are all participants over the age of 19? Remember that there are bars in bowling alleys
- Is the venue accessible?
- Have you visited the venue to confirm all details?
- Have you signed a written agreement with the venue?
- How will you ensure that all participants return with you from the event?

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EVENTS WITH FIRE
- Is the fire contained in an appropriate container? E.g. fire pit, barbeque drum
- Have Campus Community Police, park officials and the fire department been informed of your event?
- Where will the First Aid kit be located in case treatment is necessary?
- Who will be present at all times to monitor the fire?
- What will be used to extinguish the fire?
- Who will stay afterwards to ensure the fire has completely extinguished and cooled down?

EVENTS WITH ALCOHOL
- Alcohol can only be served by the University of Windsor under their Catering Services liquor license. No special occasion permits are allowed on campus.
- How will you ensure that only participants of age will be drinking? Remember, using wristbands is not flawless.
- Do your staff/volunteers know that they are required to remain sober throughout the event?
- Have you hired Campus Community Police Officers?
- Have you contacted the Student Medical Response Team?
- Is your event causing inconvenience or concern to any members of the community?
- Have your staff/volunteers received the appropriate training prior to the event?

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APPENDIX A: BUDGET WORKSHEET

EXPENSES

		Supplies:	
Item	$	Item	$
Tickets		Pens/Paper/Name Tags	
Posters		Tape/Scissors	
Flyers		Photocopies	
Advertising		Decorations	
Food/ Refreshments		Cash Box	
Napkins		Table Cloths	
Utensils/Plates		Emergency Funds	
Prizes		Equipment/ Entertainment:	
Room Charge		Sound System	
Travel Expenses		Band/DJ	
		Lighting Equipment	
Total		Total	

REVENUES

Item	$
Ticket Sales	
Fundraising	
Sponsorship	
Pop/Water Sales	
Food Sales	
Total	

Total Revenues – Total Expenses = _____

Net (+/-) = _____

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APPENDIX B: EVENT EVALUATION

Event: _____

Group/Organization: _____

Name of Organizer(s): _____

Date: _____   Location: _____

Approx. cost of event: _____   How many people attended? _____

How would you rate the effectiveness of the event: 1   2   3   4   5

Would you recommend holding the event again? (yes/no) _____

Event Description:

_____

_____

_____

_____

Advertising/Equipment/Supplies:

_____

_____

_____

_____

Contacts (guest speakers/venue/transportation/sponsors/resources):
     Name   Organization   Phone #

1) _____

2) _____

3) _____

4) _____

5) _____

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How could you have improved the event?

_____

_____

_____

_____

What was successful about the event?

_____

_____

_____

_____

Please attach all event materials, advertisements, handouts, budget etc.
that were used