

# Event Planning Toolkit

For Clubs and DSU's

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# General Information

The SFSS event planner's toolkit includes brief general information on the following topics:

- Event Objectives
- Event Description
- Event Format / theme
- Event Staff
- Date and time selection
- Target Audience
- Accessibility
- Risk Assessment
- Marketing
- Budget
- After Event Evaluation
- Tool kit check list for the day of the event

If you have questions please email SFSS Events Coordinator at [Mscevent@sfss.ca](mailto:Mscevent@sfss.ca)

## Define Event Objectives

Establishing your event objectives is the first step in planning a great event and it will help you to answer some important questions such as:

- What is the event purpose?
- Why are you hosting the event?
- What is the expected outcome of the event?
- How are you going to engage with the Student Community?
- What are the benefits of hosting this event to the SFSS and SFU?

## Event Description

This is where you must highlight and provide information about the day of the event, including but not limited to:

- Venue: Where is the event going to take place?
  - Name and location of the venue
  - List directions on how to get to the venue (Bike, walk, transit, on campus directions)
- When will the event occur
  - Times of registration, event starts, lunch breaks, event ends, etc.
- What activities will take place (if applicable)
  - Ice breakers, Presentations, Guest speakers, Live entertainment, Catering, Open bar, games, Contests, Giveaways, SWAG, etc.
- Risk Assessment:
  - Include a list of potential risk and how to mitigate them
  - Report this potential situation to SFSS Coordinators, SFU Security and MECS Team
- Who will be the guest speakers (if applicable)
- List entertainment line-up (if applicable)
  - DJ's
  - Bands, performances, clubs showcasing, etc.
- Incentives
  - Giveaways, contests, first come first serve SWAG, early bird ticket prices, etc.
- Charitable giving
  - If the event is supporting an external organization please include the name of the Charity or non-for-profit as well as who and how the proceeds will benefit

## Event Format/Theme

The event format should be based on the previously established event objectives, as well as on your target audience. To set the event format is important to consider:

- Date of the event
- Food / catering options
- Topic
- Activities
- Entertainment

## Staff Team

Assign positions and job descriptions for your Staff and Volunteers

- Event Manager
- Event Lead
- Finance Lead
- Marketing Lead
- Sponsorship Lead
- Communications Lead
- Volunteer Lead
- Security Lead

## Date and Time

Choosing the date and time of your event must be done with careful consideration in order to achieve the desired outcome (Number of patrons, tickets sales, etc.).

Consider:

- Referring to the Club or DSU's record of previous events and analyze attendance, RSVP's and ticket sales
- Consult with SFSS coordinators to find out venue / room booking availability
- Potential impact to your event by weather, holidays, exam periods, reading break, conflicting events, etc.
- Schedule your event on campus after 4pm or during lunch time
- Avoid hosting your on-campus event on Mondays or Fridays unless strictly necessary

## Target Audience

Identifying your audience will help you determine the style, tone, theme and setup of your event. A common mistake is to identify your target audience as "All SFU Student Community". You must remember that The Simon Fraser University is represented by multiple cultures, nationalities, sexual orientations, interests and a wide range of ages, so be as specific as possible. Example:

### "Fall Kick Off Concert" Target Audience

- SFU Students
- SFU Staff and SFSS Staff
- 16+ age, Inclusive and accessible for people with disabilities
- Accessible for students commuting on transit / Skytrain
- EDM, Hip-Hop and Rap fans
- Non-SFU students who can provide 2 pieces of id. (Limited to 300 tickets)

## Accessibility

When planning an event you must consider efforts to make it accessible to all participants with special accommodation and transportation needs.

- Make sure the event has accessible parking
- Venue layout has wheelchair access with wide aisles and plenty of space around tables and hallways.
- Make sure volunteers are easily identified and train them about how to respectfully assist people with disabilities

## Risk Assessment

To plan ahead of time and identify the potential risks associated with the event will prevent and hopefully avoid risky situation. Once your event plan is finished please identify and list all potential associated risks. For example:

- Low ticket sales
- Forecasting miscalculations (food, equipment, ticket prices, etc.)
- Weather
  - Snow, rain, strong winds
- Identify fire evacuation routes
- Identify who will make the calls if needed to Campus Security, RCMP, 911
- Overserving: Alcohol sales or sampling:
  - Alcohol Overserving, Pre-event drinking
  - Minors drinking
  - How to deal with intoxicated people
- Risky activities
  - Make sure to ask attendants to sign waiver forms before attending an event with any risky activity
- Inappropriate behavior

- Depending on the scale of your event (potentially) you'll have to hire an external security firm to assist during the event
- SFU Security has first right of refusal to provide the service, if they decline you may ask for the second preferred security company option

### **Security plan**

Including a detailed Security Plan to your overall Event Plan will help SFSS Coordinators and SFU Staff to analyze the proposal and answer potential risk questions faster which can lead to a faster approval of your event. Contact the SFSS Events Coordinator if you have any questions or concerns at [mscevent@sfss.ca](mailto:mscevent@sfss.ca)

## **Marketing**

### **PRINTING MATERIALS**

You can print your posters, banners, rollup banners with aluminum frame, invitations, tickets, flyers, handouts, etc. directly at The SFSS Copy Centre, it's easy, fast, cheap and convenient. For more information on pricing please contact [copycentre@sfss.ca](mailto:copycentre@sfss.ca)

### **SOCIAL MEDIA AND TRADITIONAL CAMPAIGNS**

If you would like The SFSS to promote your event please review the [GUIDELINES](#) and submit [YOUR CAMPAIGN FOR APPROVAL](#) . For more information you may contact [communications@sfss.ca](mailto:communications@sfss.ca)

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- <https://www.bensound.com/>
- <https://freemusicarchive.org/music/charts/all>
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## FREE IMAGES – NO ROYALTY OR CREATIVE COMMONS LICENSE

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## Budget

The first step to creating your event budget is to figure it out every single item that will potentially incur in a cost. Don't forget to consider the smaller items as everything adds up at end.

If your event is recurrent, please look up for previous year's budget and improve it by including items that were not consider in the past. Budget considerations from previous years are very valuable as it will make easier to negotiate prices with external and third party contractors and service providers.

**IMPORTANT:** Do not accept verbal pricing information given as a quote, make sure to ALWAYS request a detailed quote for services and goods.

### SOME IMPORTANT ITEMS TO CONSIDER WHEN PREPARING THE BUDGET:

- PERMITS
  - Temporary food permit, Liquor permit, gambling permit, special events permit, etc.
- VENUE SELECTION
  - The SFSS staff can provide pricing and help you choose venues for all SFU Campus
- CATERING
  - All catering in Vancouver and Burnaby campus must be done via *SFU Dining services*
- AUDIO VISUAL RENTALS
  - Consider late return fees and request information on potential damage to equipment
  - Pick-up and delivery costs

- SECURITY
  - If it's a mid to large scale event SFU Security Campus has the first right of refusal to provide service, if Campus Security declines you may ask for the second preferred option to hire
  
- STIPENDS / GRATUITIES
  - Establish well in advance if you are going to provide stipends to entertainment acts or speakers
  
- PRODUCTION SET UP
  - This may include tables, chairs, table cloths, whiteboards, roller boards, janitorial services, stage, fencing, electrician, etc.
  
- TAXES
  - Consider 12% of taxes in all items and services, if you have questions on this regard please don't hesitate to contact an SFSS Coordinator
  
- TICKETS
  - Some online tickets options charge commissions, services fees, or even a percentage per ticket sale so please make this clear before entering into any agreement, a proven affordable and reliable option for your ticket sales is *Showpass*, Please schedule an intake meeting with the SFSS events coordinator to learn more about Showpass.
  
- CONTINGENCY FUND
  - We recommend to calculate between 10% to 15% for unexpected costs and worst case scenarios and ONLY use this fund for emergencies



# Event Evaluation

EVALUATING AN EVENT IS AN OFTEN OVERLOOKED BUT IS AN ESSENTIAL ELEMENT OF THE PLANNING AND EXECUTION PROCESS. IT IS NOT SOMETHING THAT SHOULD BE LEFT TO THE END OF YOUR EVENT, YOU NEED TO THINK EARLY ON ABOUT WHAT INFORMATION YOU NEED TO GATHER FROM YOUR ATTENDEES IN ORDER TO EVALUATE YOUR EVENT AND INCORPORATE THIS INTO YOUR PLANNING.

The SFSS has an event evaluation form to assess all event requests for Student Unions and Clubs and it include the following questions:

- Name of Club / Student Union
- Name of Executives responsible for the event
- Venue / Date / Time
- Please describe the results of your project/event. How did it support your club/SU/CG mandate?
- How did your event/project advance the mission statement of the SFSS as described in your grant proposal?
- Would you say that your event/project was successful?
  - How did you measure the success?
  - What worked, and what did not?
- How many people attended your event or benefited from your project?
  - Number of SFU-Students attending the event
  - Number of Non-SFU Students attending the event
  - Number of guest speakers / presenters
- How did you measure the attendance?
- Did you work with any other groups on this event/project? Please provide details
  - Was the collaboration successful?
  - How did the other group contribute to the success?
- List all the expenses / revenue that occurred during your event/project
  - Ticket Sales
  - Sponsorship
  - Contributions

## Tool Kit

ON THE DAY OF YOUR EVENT IS ALWAYS IMPORTANT TO HAVE A KIT WITH COMMON ITEMS THAT ARE IMPORTANT TO HAVE BEFORE, DURING AND AFTER ANY EVENT.

- Venue Map / Setup (locations to washrooms, emergency exits, security, info booths, etc.)
- Print sheet with staff and volunteers shifts and duties
- Office Supplies: Paper, Pens, Notepads, Markers, Exacto Knife, Tape, notebook, iPad, laptop
- Name tags or bracelets
- First Aid Kit (bandages, aspirins, tums, etc.)
- Pay cheques for contracted vendors / service providers
- Access to a Printer
- Cash box with lock and petty cash
- Registration forms (if needed)
- Business Cards
- Batteries / battery chargers
- Zip ties
- Signage (coat check, no liability on lost items, emergency exit, washroom, etc.)
- Box for lost and found
- List with staff and volunteers phone numbers