



Simon Fraser Student Society Events Planning Toolkit

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About the SFSS

The Simon Fraser Student Society is a student-led organization that represents and advocates for the interests of the 25,000+ undergraduate students at SFU. We are your not-for-profit support network and voice at SFU and provide services and support to make your student life better.

Events Terms of Reference

The purpose of the Events Terms of Reference is to help you in planning, organizing and executing your event goals as an SFSS Student Organization.

[The SFSS Events Terms of Reference can be found here.](#)

SFSS Resources

The SFSS provides many resources to approved student groups. As an SFSS organization, you have access to the following services:

- Room & space bookings
- Audio visual equipment
- Facilities
- Catering
- Contract signing
- Waivers
- Health/Safety guidelines, forms, procedures and permits
- Grants and event funding
- Club email access

For more information regarding club and student union resources can be found on the SFSS website in the [Clubs 101](#) and [Unions 101](#) sections.

Starting to Plan an Event

→ Planning, Implementation, Coordination

Where to start

When starting your event planning, ask and answer the following questions:

Why	Why are you running the event? Why will attendees attend?
What	What is the purpose? What type of event is this for? What will attendees get out of it? What resources do you require?
Where	Where will you be hosting the event?
Who	Who is needed to run the event? Who is your target audience?
How	How are you going to make this event happen?

Determining your Event Type

It is important to determine what type of event you want to host. Below are several event types you may want to consider depending on your group's goals.

Sample Event Types	
Networking	Provides guests with the opportunity to connect with each other for mutually beneficial relationships
Fundraising	Raising funds or awareness for a cause
Socials	Socialise, mingle, have fun - can be used to help create community or stronger connections
Team Development	Building team trust, making connections, recognizing accountability
Workshops	learning from industry professionals or other experienced individuals
Competition	Opportunity to engage in activities competitively
Recognition & Appreciation	Give credit/ recognition and celebrate a person, groups of people or the team

Timeline Creation

Selecting an event date may be the most important part of your event planning. When considering when to host your event, review the following:

- Academic Calendar - is there a prime exam time?
- SFU Events Calendar - are there any other major events on campus at the same time?
- Your team's availability - when is your team available to plan and execute the event?

Set Event Goals (SMART GOALS)

Setting S.M.A.R.T goals are essential to your planning. The solution is to structure your goals by being as clear and specific as possible.

SMART GOALS	
Specific	Clear and specific event goals. Make sure your goals are effective for planning.
Measurable	Your goals should be tracked. Have a clear definition of success that helps you evaluate achievement and progress.
Achievable	It is important to set a goal that you can actually achieve with the resources you have available. Your goals should be realistic and attainable - don't stretch the possibilities.
Relevant	Your goals need to be relevant to you and what you set out to achieve. Make sure the goal has value and also matters to you.
Timely	Your goals need a deadline, and you need to give yourself enough time to plan. Set an end point that isn't too far in the future to also keep you motivated.

Project Planning

Project planning has four core components of planning, managing, controlling, and monitoring the associated activities with your event or project.

Planning	Defining clear objectives and goals, and the timeline that is needed to get there
Managing	Overseeing and supporting those working on and executing tasks within your team
Controlling	Ensuring there is control over the project and that what needs to be done can be without disruption
Monitor	Monitor the progression of tasks and actions, make sure targets are being hit and the project is moving towards the goal

Project Management Tools

Online project management tools are a great way for you and your members to organise your event planning. A few recommendations for websites include:

Google Drive:

Google Drive provides a great opportunity for all of your shared documentation for your planning. Google Drive allows users to store files in the cloud, synchronising files across devices.

<https://drive.google.com/drive/u/0/my-drive>

Trello:

Trello is an online project management application that can be used to organise responsibilities within members of the team.

<https://trello.com/en>

Asana:

Web and mobile work management platform designed to help teams organise, track, and manage.

www.asana.com

Notion:

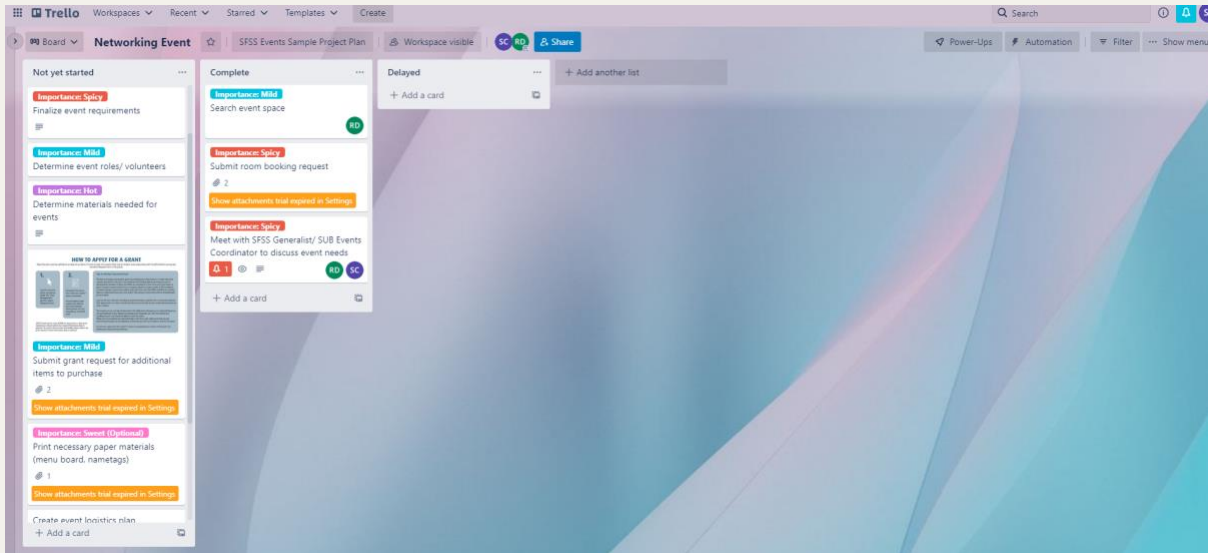
Notion is a project management and note-taking software designed to help members of an organisation or team coordinate deadlines, objectives, assignments.

www.notion.so

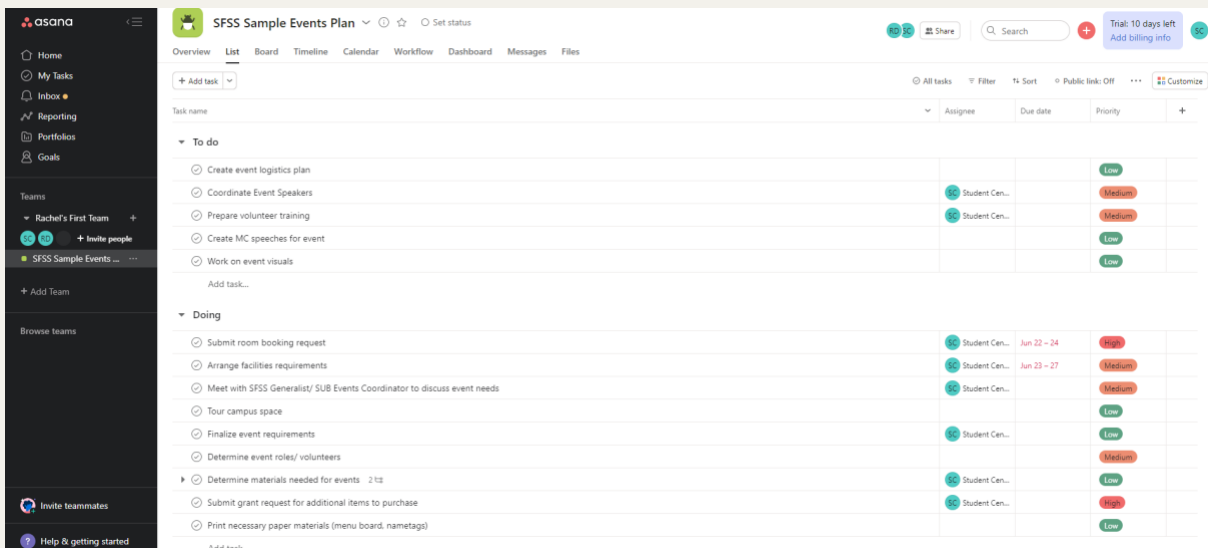
Sample Dashboards:

Trello:

<https://trello.com/invite/b/VSGVhRSW/9cb3b11ca5d5b95b1bed39a8645008ab/networking-event>



Asana: <https://app.asana.com/share/sfss/sfss-sample-events-plan/608574341509619/ca9c57bfe0b707bc2c2560ed9b0fb80c>



Notion:
<https://www.notion.so/2e5ea7ca56d441d1bc64ed7e3021d344?v=0b2290a6c91b457fa0a1d95d95de29e0>

Rachel Dee's Notion

Quick Find
All Updates
Settings

SHARED

SFSS Sample Events Page

SFSS Sample Events Page

Here's a handy template to help you with your event planning needs!

- 1) Plan out and adjust your event tasks as necessary
- 2) Figure out what deadlines you need to prioritize
- 3) Assign tasks to individuals (or teams)
- 4) Give yourself a due date for the task and update your task status
- 5) Add any notes about the task (whether it requires more action items, where it is located, etc.)
- 6) Adjust this template to your liking!

HINT: hover over a task and click "open" on the right hand side to open a more detailed task view
You can also "Sort" (far right hand side) by variables like Status, Due Date, etc.
To return to normal view, click "Sort" → "Delete Sort"

[insert more instructions]

Board View | Calendar | Gallery | Add view

Filter Sort Q ... New

Task	Status	Assigned To (1)	Assigned To (2)	Due Date	Task Notes
Venue Search	To Do		Nicolas		Research bookable spaces on campus for event
Submit room booking request	To Do		John		
Arrange AV/Facility Requirements	To Do		Nicolas		
Meet with SFSS Generalist to discuss event needs	To Do		Sam		
Meet with SUB Events Coordinator to discuss event needs	To Do		Nimra		
Tour Campus Space	To Do		Crystal		
Finalize event requirements	To Do		Crystal		
Facilities, AV, Event Security, Catering	To Do		Sophie		
Receive finalized plan from SFSS	To Do		Rachel		
Determine event roles/ volunteers	To Do		Rachel		

You are currently a guest. To see all the workspace pages, ask an admin to upgrade you to a member.

Create a workspace

NOT EMPTY 100%

Planning On Campus & Off Campus Events

SFU Spaces

- Meeting Rooms
- Open Space
- Outdoor Space
- Gym Bookings
- SFU Harbour Centre
- SFU Surrey

Student Union Building Bookings

- Boardroom Style Rooms Site-Visits
- Tabling in the SUB
- Event Spaces & Bookings

Event Extras

- Audio Visual Equipment
- Facilities Services
- Gym Additions

SFU Catering **Self-Catering**

Forms

- Waivers
- Photo Release Forms

Submission Deadlines

External Events

- Venue Contracts
- Certificates of Insurance

Online Events

SFU Controlled Space Bookings

There are several options for booking meeting rooms on different SFU Campuses.

- Requests for meeting rooms within SFU spaces (WMC, AQ, etc) can be booked through your club portal.
- The executive(s) with room booking authority must submit the request through the club portal and be responsible for any communications with the SFSS Student Centre regarding the booking.

Burnaby Campus Meeting Room: Classrooms, tutorial rooms, lecture halls.

Meeting rooms are available for bookings within SFU owned spaces and requests can be submitted through your club portal.

- Includes: WMC Tutorial Rooms, AQ Tutorial Rooms etc.
- Must be made a minimum of 5 business days prior to the booking.

Burnaby Campus Open Space: Larger SFU spaces for events that are not classrooms.

Open space rooms can be booked through your club portal.

- Includes: WMC Atrium, Saywell Hall Atrium etc.
- Must be made a minimum of 10 business days prior to the booking.

Burnaby Campus Outdoor Space

Outdoor spaces can be booked through your club portal

- Includes: Labatt Court, WMC Patio, AQ Courtyards, Strand Hall Plaza
- A full list of SFU Outdoor Spaces can be found at: <https://www.sfu.ca/mecs/outdoor-spaces.html>

Burnaby Campus Gym Bookings: East, West, Education Gyms

Gym bookings can be booked through your club portal.

- Must be made a minimum of 10 business days prior to the booking.
- SFU Rec Gyms to be booked through a portal (SFSS submits a request to SFU Rec)
- SFU Recreation follows an hourly pricing model
- Education Gym can be booked directly with the Education Department

SFU Vancouver Campuses: Harbour Centre, Goldcorp Centre for Arts, Segal Building

- Vancouver Campus bookings can be made through your club portal.
- Rooms at SFU Harbour Centre can be viewed here: <https://www.sfu.ca/mecs/vancouver-main/harbour-centre/meeting-rooms.html>

SFU Surrey Campus: Meeting rooms at SFU Surrey Central and SFU Engineering Building

- Rooms for SFU Surrey campus can be made through the club portal.
- Must be made a minimum of 5 business days prior to the booking.

Student Union Building Bookings

There are several options for booking spaces within the SFSS Student Union Building.

Boardroom Style Rooms

Boardroom style rooms are available for booking. Boardroom Style Meeting and Activity Room *requests must be received 5 business days before your requested date*

- Currently these rooms are available “as is” and are suitable for meetings and small scale activities that can be done with a boardroom style set up.
- Tables and Meeting rooms can be booked through the Clubs/SU Portal by Club/SU Executives only.
- Go to your Club/SU dashboard under Club/SU Management and look for Student Union Building (SUB) Space Bookings.
- For Sub Tenants and SFSS Affiliated Groups that do not have access to the portal please email sub.bookings@sfss.ca for more information.

Large Scale Event Bookings in the SUB

SUB Events Definitions:

An event is anything other than a meeting of group members (meetings can be for social purposes, related to the group mandate, planning, training, etc.)

- An event is anything that has people invited that are not members of your group
- Anything that requires set up by the SUB building Staff, SFU Facilities, or an external group
- **Anything with resources that are additional to what is already in the space**
- Anything with catering or food that is not snacks, pizza, individual fast food, coffee

SUB BASIC EVENT

- Little or no set up
- No catering (pizza, snacks, individual fast food are allowed)
- No outside vendor or SFU department involvement
- No extra resources to be provided by SFSS
- Only group and SFU community members in attendance
- *Requests must be received 10 business days before your requested date*

SUB LARGE/COMPLEX EVENTS

- May involve one or all of the following:
 - Set up
 - Catering
 - external vendors and/or SFU department involvement
 - additional SFU resources
 - more than one room
 - more than one day
 - guests who are not SFU community members
 - guest speakers
 - *requests must be received 20 business days before your requested date*

SUB Bookable Spaces are as followed:

- 2120 – standard set up Boardroom Style 16
- 2420 and 2440– standard set up Boardroom Style 18, video conferencing equipped
- 4200 – standard set up Boardroom Style 26, space capacity varies based on set up
- SUB Ballroom – Max capacity 220, capacity (up to maximum) dependent on set up (catering kitchen available for use by professional caterers only)
 - The **ballroom is unfurnished** and any furniture requests/set up must be included in your request and will be facilitated by SFSS or SFU departments as required
- Social Stage Lounge: across from Blenz at 3000 level entrance – centre space and stage area only (orange lounge chairs remain) capacity varies dependent on set up

Audio Visual Equipment

Audio Visual Equipment can be requested at the time of the booking submission through your portal.

Services include but are not limited to:

- Microphones
- Speakers
- Projectors
- Extension Cords

If groups require additional A/V equipment, it is recommended that they inquire to Long & McQuade services and rent themselves. There are limitations on what equipment can be used on campus spaces. If your venue(s) allows for external A/V equipment and the equipment is not available through the venue, you may be able to rent the equipment externally through a company such as Long & McQuade.

Facilities

Services include but are not limited to:

- Rolling Boards
- Tables
- Chairs

All facilities requests will require a set-up diagram to be submitted. The SFSS Student Centre will facilitate communication for your set-up diagram.

Set-up Diagrams

When submitting a facilities or AV request, the Student Centre will require a diagram of how you would like the AV or facilities to be set-up within your space. They will inquire for a diagram once your space has been confirmed.

SFU Catering

SFU's catering menus vary depending on which campus and location your event is happening at.

Catering menus are as follows:

[SFU Burnaby Menu](#)

[SFU Vancouver Menu](#)

[SFU Surrey Menu](#)

For bookings on weekdays (after 5:30pm) and on weekends, catering services are unavailable.

More information regarding SFU Catering services can be found here:

<https://www.sfu.ca/ceremonies/toolkit/planning/catering.html>

Self-Catering

Self-catering is defined as bringing in your own food or pre-packaged snacks yourself.

Currently, self-catering is permitted in the SUB but subject to such things as snacks, pizza, individual fast food, coffee (coffee service by urn or take away box is allowed).

Light snacks (pre-packaged) are allowed in SFU owned spaces. However, clubs are responsible for keeping the room and floor tidy and removing all garbage after your event. Failure cleanup after your event could result in losing future room-booking privileges.

Food Permits

Food permits are required if you are serving food to the general public. One member of your club will also be required to have a valid Food Safe Certificate. The link to the Fraser Health permit application can be found [here](#).

Restaurant Operating Licences

If you are ordering food from an external company and serving it to members of your club or the public, you will be required to provide the restaurant's operating licence as proof they are an established organization with a valid operating permit.

Waivers

Waiver forms can be requested from the Member Services Coordinator - Generalist. The SFSS will provide two versions, one for minors and one for those over the age of 19. You may want to request waivers for events that involve physical activity. Examples of these events and activities may include rock climbing, hiking, and canoeing

Submission Deadlines

Activity	Required Processing Time
Meeting Room Booking	5 Business Days
Open Space Bookings	10 Business Days
SUB Boardroom & Table Bookings	5 Business Days
SUB Events SUB Basic Events SUB Complex Events	10 Business Days 20 Business Days
Grant Submissions	<\$1000 10 Business Days >\$1000 20 Business Days
AV*	5 Business Days
Facilities*	5 Business Days
SFU Catering	10 Business Days

*Set up diagrams must be submitted when your space/ booking is confirmed.

External Events

Venue Contracts

All venue contracts must be submitted and signed by the SFSS. Club Executives do not have signing authority, it is required legally that all venue contracts for the student club are signed by the SFSS.

Certificates of Insurance

Certificates of Insurance (COI) can be provided by the SFSS for external bookings that require them. COIs are likely requested by the venue at the time of the booking. Email the Member Services Coordinator - Generalist to request for a Certificate of Insurance to be provided.

Online Events

Please contact the SFSS Student Centre if you are booking a request for an online event that takes approximately 5 weeks to process.

- Platform Availability: Hopin, Zoom Webinar, Zoom Meeting
- Student groups must go through the SFSS to book these SFU services.
- [Information on Accessibility, Privacy and Technology for Attendees can be found here.](#)

Marketing Your Event

Online Strategies

In-Person Promotion

Selling Event Tickets

Selling Strategies

Marketing Your Event

When marketing your event, it is important to understand your own target market.

- Who is your audience; is the event open to all SFU students?
- What are all the communication channels for potential guests?

Brainstorm all of the possible channels and try to use as many channels as possible in order to reach a wider audience.

Online Strategies

SFSS Bi-Weekly Newsletter

The SFSS sends out a bi-weekly newsletter to all students in their membership on Fridays. Requests to be featured within the newsletter can be sent to studentcentre@sfss.ca with your event details and a marketing graphic.

Social Media

Utilising your group's social media pages provides a great opportunity to spread awareness about your event or group's presence.

Good opportunities for social media promotion include:

- Setting up an event page on Facebook or Instagram
- Inviting students to the event page
- Asking your executives and members to share on their personal accounts
- Hosting social media giveaways to increase your reach

Tip: prepare your marketing material in advance rather than creating while posting. Pre-scheduling posts and creating a content posting calendar can help with the effectiveness of your marketing.

SFSS Event Calendar

You can request for your upcoming event to be featured in the SFSS online events calendar <https://sfss.ca/calendar/>.

In-Person Promotion

Tabling

Booking a table and sitting there pitching to students presents a great opportunity for ticket sales and visibility.

- Possible locations on SFU Burnaby Campus include Convocation mall, inside or outside of the Student Union Building, and inside West Mall Centre.
- In preparation for your tabling, it is good to come prepared with the following materials:
 - Club Banner
 - Event posters, handouts
 - Laptop for in-person sign-up/registration
 - Cashbox & change if you are collecting ticket sales
 - Swag/candy for to incentivize people to chat with you

- Props
- Tips: Know your pitch! Make sure all members who are pitching with you know all the necessary event facts.

Selling Event Tickets

When selling virtual tickets for the event, it is necessary to set up a secure method for people to purchase tickets through systems.

- Possible event ticketing platforms include: EventBrite, Bounce
 - Keep in mind that there are service fees and credit card processing fees that you need to take into account.
1. Connect your ticket sale system to your event website.
 2. Promote ticket sales for your event through social media, email, posters, and table/booth.
 3. Have a system in place to be able to accept cash payment, as many students may prefer to pay this way so they don't have to pay for service fees.
 4. Ensure there is a safe place to keep the cash.
 5. Set up a float and schedule for when people can buy tickets in person.
 6. You can set up separate early bird ticket prices or day-of ticket prices, but make sure you account for these differences in your budget and set a cap on the number available.
 7. If you allow people to register online and pay in person, ensure that you set up a way to collect payment prior to the event. If you leave it to the day of the event, plan for the possibility of the person not showing up and not paying. It is highly recommended that you do not leave payment collection until the day of.

Selling Strategies

Ensure you have a maximum number of attendees set prior to opening ticket sales.

- Confirm the capacity limit with the venue.
- Consult with your event caterer your expected number of attendees.
- Calculate your break even point for ticket sales.

Pricing Strategies

Using pricing strategies at the beginning of your ticket sales can help increase the number of total tickets sold, and tickets sold with the special promotion.

- Early bird: special purchase price offered to those who purchase at the start when sales open.
- Bring a friend: buy two tickets at a discounted price or certain percentage off

Logistics

Logistics are the key to your event running smoothly and on time! Logistics are used to keep your whole team on schedule and to have a clear understanding of each member's responsibilities.

1) Create a draft and consider:

- How long will your event be?
- Will it occur during the morning, day-time, or evening?
- Where are your guests going to be and at what time(s)?
- When and where do you want to schedule breaks?

2) Adjust your schedule based on your planning needs:

- As you confirm your numbers, room bookings, venue arrangements

3) Finalise your schedule prior to printing it.

Tip: When planning an event, last-minute changes are common. Your guests may want to know ahead of time what the day looks like, you might want to have general guidelines but leave room for adjustments to be made or include a line "*subject to change*" for some breathing room.

Other Event Considerations:

- On-site staffing requirements
 - List out all on site staffing requirements such as:
 - Registration staff
 - Runners
 - MCees
- Inventory & Materials
 - For inventory that your group already has on-hand, create a transportation plan for which executives or club members will be bringing it
 - If you require materials to be shipped to your venue site

Risk & Mitigation

When planning an event, last minute changes are common and force you to be adaptable to changing circumstances. Look at your event day by day, listing out all the tasks and everything that could possibly go wrong. An important part of planning is reviewing your event and considering what risks are involved with hosting the event.

Provide a safe and secure environment and experience to ensure an event will be remembered positively!

- Sample risks that may occur:
 - Participant gets injured
 - AV equipment does not work
 - Lost items at coat check

Having a contingency plan in place can assist you during your planning and during the event to answer - what will you do if your original plan fails? In contingency plans, prepare for the unexpected and plan ahead of what you would do if your original plan fails.

Event Communication

Confirm if the event venue has on site communication tools that you can use such as the Internet, computer, printer etc. If unavailable, plan accordingly.

Ensure everyone has the contact information needed to reach the key people during the event. On the day of your event, it is key to have a plan for communicating with the rest of your team to stay updated on any changes or updates that occur.

The following platforms are recommended for communication:

- Whatsapp
- Slack
- Discord

Effective run-throughs

Event run-throughs should be scheduled prior to your event to ensure all those involved in running it understand their responsibilities for the event.

- Set realistic goals during meeting
- Line by line read through of logistics plan
- Understand the flow of the event
- Record and make changes right away to the logistics plans if errors occur