

## Step-by-step event planning checklist for grad student organizations

### Develop the Event Concept

- Start earlier than you think necessary. Event planning takes time!!
- All of your events should have a specific, detailed goal/purpose.
- Make sure the event you plan actually meets the goal.
- Keep it simple!
- Develop a budget (see budget worksheet handout)

### Before the Event – 8 weeks out

- Recruit co-sponsors
- Choose potential dates, need to be coordinated w/ space availability, speaker availability, etc.
- Line up speakers / entertainment. If your event includes an important public figure, notify the Office of Student Affairs.
- Reserve space and arrange for a/v equipment
- Decide on the attendance policy: Grad students only? Grad students + guests? Any member of the Penn community? Is the event free or is there a cost? How many tickets can each person buy? Etc. Make sure these restrictions are noted in all of your publicity.
- Take registration for free events (if you don't, you run the risk that no one shows up or too many show up. Use Google forms or other online tool.)
- Create and print tickets, if needed. Include event title, date, time, and location on ticket.
- Make arrangements to sell tickets (in school, on Locust Walk, in Grad Center)
- Order food if needed -- be aware of the many dietary restrictions on campus
- Arrange transportation if needed
- Arrange for photography if needed
- Walk through the event both as a participant and as the event coordinator
- Arrange for thank you gifts for speakers, volunteers, etc.
- Monitor sign-ups (renew publicity efforts 7-10 days in advance if necessary)
- Create program booklets for your event if needed

### Publicize your Event – 2-4 weeks out

- All materials should include title and description, date/time/location, ticket price, how to register, who can register, co-sponsors, etc.
- Be sure to promote a positive, inclusive message about your organization and the event.
- No advertisement of alcoholic beverages shall be permitted, either directly or indirectly, in any booklet, program, periodical, brochure, circular, or other similar publication, published by, for, or on behalf of any educational institution.**
- Post on organizational web site
- Post on organizational calendars
- Create flyers
- Post on Facebook/Twitter/etc
- Ask GAPSA to post on their weekly email: <http://form.jotform.us/form/22408960563153>
- Ask school government to post on their email
- Frequently check on ticket sales/sign ups and adjust publicity efforts accordingly. If you wait until the day before your event to realize there are only 8 tickets sold, you won't have time to fix things!

## Step-by-step event planning checklist (page 2)

### Day before the Event

- Send out reminders to registered students, speakers, volunteers, caterers and any other vendors

### Day of Event

- Be at the event location in time to accept food deliveries, greet speakers, handle early arrivers (at least 45 minutes before start of event)
- Bring list of registered students
- Bring phone numbers for vendors, speakers, volunteers, etc.
- Check in students as they arrive
- Begin the program with welcoming remarks, in which you introduce yourself then the speaker/entertainment/etc.

### After the Event

- Send letters or emails of thanks to your speakers; send thank you gift or honorarium
- Send letters or emails of thanks to volunteers; send thank you gift or honorarium
- Email participants with a quick survey to get some feedback on the success of your event
- Update budget

See <http://www.vpul.upenn.edu/osa/manual/eventplan.html> for more event planning tips.

## **Penn Guidelines**

There are lots of policies, rules, regulations, and guidelines at Penn that your organization needs to follow. We can't possible list them all, but here are the big ones. Whenever you are in doubt about a policy, consult the student affairs staff in your School, the Office of Student Affairs, or Anita Mastroieni in the Graduate Student Center.

## **Funding**

You can seek funding for your events from a variety of sources:

- GAPSA Student Group funding for registered student groups:  
<http://gapsa.upenn.edu/grants-funding/grants-funding-student-groups/>
- Your school receives an annual funding allocation from GAPSA based on the number of grad/professional students in your school. This funding comes from your student fees, and is yours to spend! Most schools allocate the funding through the school-wide grad government.
- Co-sponsorship: Determine if other Penn student groups and/or University offices would be interested in co-sponsoring your event, and ask them to pitch in! Remember to \*always\* recognize co-sponsors on publicity materials.
- Corporate sponsorship: Be aware of restrictions on promoting alcohol vendors, etc.

## **Contracts**

- No student may sign a contract on behalf of his/her organization! If you do, you are personally responsible. If you are a University-wide student organization, send your contracts to the Office of Student Affairs. If you are a school-based student organization, send your contracts to a BA in your school. Send contracts at least two weeks before the event!
- All speakers, performers, etc. must have a contract. If they do not supply one of their own, get a generic contract from the Office of Student Affairs.

## **On Campus Room Reservations**

- Perelman Quad: [www.perelmanquad.com](http://www.perelmanquad.com)
- Grad Center: [www.gsc.upenn.edu/facilities/](http://www.gsc.upenn.edu/facilities/)
- Your home school

General rule: the more you need, the more it costs. While many campus facilities will waive location fees for student events, there are other fixed or external costs that facilities will pass on to your organization. The more extensive or specialized your needs – or the more people involved – the greater the cost. (Just to consider when you're discussing the fog machine.) Typical costs include:

- Facility Rental (often waived for student events)
- Facility Set-Up (including podium, chairs, tables, tablecloths, decorations, unique configurations, etc.)
- Technology (microphones, audio/visual systems, projectors, screens, etc.)
- Security
- Catering
- Housekeeping

## Penn Guidelines (page 2)

### Alcohol policies

If you host an event with alcohol, your organization is responsible for adhering to all State and University regulations. You are liable for what happens, legally and according to the University.

***Your organization cannot exchange money for alcohol in any way, shape, or form.*** This is a state law, not Penn policy. You cannot sell alcohol at an event. You cannot sell tickets to an event if the ticket price includes alcohol (i.e., you cannot charge students to get into a happy hour). Basically, your organization always has to provide the alcohol for free or else go through a vendor who has a license to sell alcohol (like a bar or restaurant).

If you are hosting an event with alcohol on campus, you must:

- Provide non-alcoholic beverages (and not just water)
- Provide appropriate amounts of food
- Have a system for ensuring that only people aged 21+ have access to drink alcohol
- Hire a university-approved bartender
- If your event involves alcohol in an open location (i.e. outdoor plaza), you are required to pay for security. If your event is in a controlled location (i.e. a room with only one access point), security may not be necessary. Something to consider as you plan your event location.
- No advertisement of alcoholic beverages shall be permitted, either directly or indirectly, in any booklet, program, book, yearbook, magazine, newspaper, periodical, brochure, circular, or other similar publication, published by, for, or on behalf of any educational institution.
- Service of alcohol at on-campus events must end no later than 1AM; events may continue until 2AM
- The organizers of events must properly dispose of partially filled and empty alcohol containers at the conclusion of the event.
- NO kegs on campus!
- Think carefully before serving hard liquor. We really discourage it
- Have a plan for dealing with intoxicated persons

See <http://www.gsc.upenn.edu/resources/alcohol.php> for all of the rules around hosting an event with alcohol on campus.