



STATE UNIVERSITY OF NEW YORK AT NEW PALTZ

Student Activities and Union Services

Student Union Building, Room 211
(Phone) 845-257-3025; (Fax) 845-257-3695

STUDENT CLUB/ORGANIZATION EVENT PLANNING TIMELINE

To better assist you in planning your event, please complete this checklist. Please bring this checklist with you to your scheduled event consultation with a staff member in the Office of Student Activities and Union Services. Please note that this is a general guide and additional tasks may be required (particularly for big events).

Preferred Event Specifics:

PROGRAM TITLE:	_____	DAY OF WEEK:	MON	TUE	WED	THU	FRI	SAT	SUN
PROGRAM DATE:	_____	PROGRAM LOCATION:	_____						
PROGRAM TIME:	_____	STUDENT CLUB HOST:	_____						
STUDENT CONTACT:	_____	STUDENT NP E-MAIL:	_____						
STUDENT PHONE:	_____	STUDENT SIGNATURE:	_____						

Part 1 - Things to Consider when Planning an Event:

- Is this event for us?
 - Is this something that will be of interest for the audience the group hopes to attract or does it appeal only to a few members of the group?
 - Is this an event that will enhance the group's image?
 - Do we have enough members in our group to run the event and is everyone committed to this project?
- What about our finances?
 - How much will it cost to put on this event?
 - Will there be a fee for a speaker or performer?
 - What will we have to pay for (use the attached budget worksheet as a guide)?
 - Do we have enough money in the budget to cover all expenses (even if we don't make a dollar on ticket sales)?
- How will we publicize and market the event?
 - Who is our target audience?
 - What is the projected attendance?
 - How will we advertise to reach our target audience?
 - Have we reviewed the campus advertising policy?
- Will we be able to do this event?
 - If this is something other than a meeting, have we met with the Director of Student Activities and Union Services (or designee) to get approval for and assistance with this event; did we turn in a FUSE form and obtain a room confirmation?
 - Are there other events on campus that day/night that could adversely affect our attendance?
 - Who will be responsible for completed service orders and other applicable requests?
 - Who will assure the event cleaned up and what is our duty in cleaning up the event?

Part 2 - 2-4 Months Out - Starting the Process:

- Look at Your Budget - what do you have for the event _____
 - Use the attached Budget Worksheet as a Guide
- Meet with Organization Advisor and/or Executive Board to discuss plans and ideas
- Complete a (typed) FUSE Form, drop off to the office of Student Activities and Union Services in SUB 209
- Identify what portions of the event will need to be contracted (DJ, Performers, Sound, Security, etc...)

Part 2 CONTINUED - 2-4 Months Out - Starting the Process:

- Make an event consultation appointment with a member of the Student Activities and Union Services staff
 - Room Reserved - Location _____ Time _____
 - Confirmation Number: _____
- Identify what other services will be needed
 - Food /Catering/Refreshments/Snacks YES NO
 - Additional Parking/Expecting Outside Guests YES NO
 - If yes, How many outside guests are expected _____
 - Event set-ups (Room Layout/Floor Diagram) YES NO
 - AV/Tech & Multimedia Support (SUB, IMS, or Outside Service) YES NO
 - Selling Tickets at the Door YES NO
 - Are you showing a movie, film or video clips YES NO
 - If yes, did you secure the movie/film rights? YES NO
 - Are you selling items at the door or hosting a vendor YES NO
 - Porta-toilets for events outdoors YES NO
- Complete a SUB Cost Assessment for services in Student Union (this can be done in your event consultation meeting)
- Contract all performers and event services
- Obtain biographies and backgrounds on each performer - this will be needed to assess security at your event
 - Get references from other schools, if required, by Student Activities and Union Services

Part 3 - Minimum of one Month Out:

- If not yet done so, complete a FUSE Form, drop off to the office of Student Activities and Union Services
- If not yet done so, make an event consultation appointment with a member of the Student Activities and Union Services staff
 - Room Reserved - Location _____ Time _____
 - Confirmation Number: _____
- If not yet done so, Complete a SUB Cost Assessment for services in Student Union
- Once you meet with Student Activities, complete the Event Consultation Worksheet provided to you by Student Activities and get required signatures from other campus departments and services
- Do an initial logistics meeting with essential individuals of your student group
- Book hotel (if applicable) - Hotel _____ Confirmation Number _____
- Book sound support (if applicable)
- Review Performance Contracts (if applicable). Are there additional services based on the contract to negotiate and/or provide
- Confirm and order services as per advisement of Director of Student Activities and Union Services
- Develop a timeline for night of events
 - Doors Open _____
 - # Workers Needed _____
- Develop marketing/advertising campaign
- Process contract for payment (through Student Association, if applicable)

Part 4 - Two - Four Weeks Out:

- Purchase any additional needs from performance contracts _____
- Have all advertising started on campus. List three advertising methods below:
 - _____
 - _____
 - _____
- If tickets are being sold. When _____ Where _____ Cost _____
- Obtain volunteers
- Review budget. Is the event coming in on budget?
- Submit Budget Request to Student Association for approval
- Turn in completed EVENT CONSULTATION WORKSHEET (with any additional required paperwork/forms required) to Student Activities, have follow-up meeting with Director of Student Activities and Union Services, if required or if you have questions.
- Identify if any equipment is being dropped off early. If so, do you have a storage place and/or approved early arrival in your reservation? If early drop off expected, whom from the student group is meeting the supplier of the drop-off?

Part 5 - Two Days - Two Weeks Out:

- Refresh all advertising methods
- Call performers/agent to finalize all arrangements
 - Arrival Time _____
- Exchange Emergency Contact Info with any speakers, performers, or service providers:
 - _____
 - _____
 - _____
- Anything else performer mentioned of note

- Develop a tasklist/checklist/timeline for day of event
- Verify all contracts have been processed for payment with Student Association
- Gather all requests/work orders into one central location for easy access (a clipboard or folder with all communication is recommended)
- Gather any supplies, decorations, other things you need to take with you to the event (a box is a good way to keep all things together for a quick pick up and go)

Part 6 - The Day of the Program:

- Check in with Student Activities and Union Services - last minute questions
- Pick up check(s) for performers (Student Association) or verify that Student Activities and Union Services will bring the check to the event for you (typically only for outside security services)
- Do a walk-through of all locations (dressing room/performance/event areas)
 - Room arrangements set
- Meet performers/contracted performers. Get them situated. Do they need anything?
- Double check all service orders and verify completed (introduce yourself to custodial, police, etc...)
- Complete Sound check if necessary
- Obtain an introduction from performer, review the event with the speaker/performer step-by-step (any special requests or logistics that may need addressing)
- Meet with Volunteers - do a run-through of event (clarify roles)

Part 7 - During the Program:

- Introduce the performer (s)
- Have a runner by performance area for last-minute performance needs
- Do a sweep of the venue area - make sure everything looks good
- Keep a birds-eye view of the event - it is important to not forget you are still in charge of the event

Part 8 - After the Program:

- Pay the performer (s)
- Return the venue back to the way you found it (clean-up, etc...)
- Thank your performers, service people, volunteers, etc...
- Complete post-event evaluation for future years - what worked well, what needs improvement, etc.
- Complete a budget review of event, reconcile budgets
- Count and deposit monies into a safe place (through Student Association or the Office of Student Activities and Union Services)
- Submit any budget/follow up paperwork to Student Association
- Follow up with Student Activities and Union Services - let us know how it went.

Attachments

Use the attached documents for helping you coordinate aspects of planning your event. These are resources so you know what to consider/ask when booking a speaker or performer, a guide for helping you consider any aspect of budgeting for your event, etc.

- Questions to Consider When Booking A Speaker/Performer/Band
- Budget Planning Worksheet
- Event Evaluation
- Student Club Event Consultation Worksheet (You will get this when you meet with Student Activities and Union Services)



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Questions to Ask When Booking a Speaker/Performer/Band

***THIS FORM IS NOT REQUIRED FROM THE STUDENT ASSOCIATION OR THE
STUDENT ACTIVITIES AND UNION SERVICES OFFICE FOR PLANNING YOUR EVENT,
BUT IS RATHER A GUIDE FOR YOUR GROUP WHEN HIRING OUTSIDE
ENTERTAINMENT OR SERVICES.***

AGENCY/ARTIST REPRESENTATIVE INFORMATION

NAME OF ACT/ARTIST: _____

NAME OF AGENCY: _____

AGENCY ADDRESS: _____ PHONE NUMBER: _____

CITY, STATE, ZIP CODE: _____ FAX NUMBER: _____

AGENCY E-MAIL: _____ NAME OF AGENT: _____

STUDENT GROUP INFORMATION

STUDENT CLUB HOST: _____

STUDENT CONTACT: _____ STUDENT PHONE: _____

STUDENT E-MAIL: _____

EVENT INFORMATION

PROGRAM TITLE: _____

DAY OF WEEK (Circle one): MON TUE WED THU FRI SAT SUN

TYPE OF EVENT: _____ PROGRAM DATE: _____

PROGRAM LOCATION: _____ EVENT START TIME: _____

RAIN LOCATION (IF OUTSIDE): _____ SET-UP TIME: _____

LENGTH OF SET: _____ BREAK-DOWN TIME: _____

FEES AND CONTRACTUAL OBLIGATIONS

ARTIST FEE: _____

AGENCY FEE (If Any): _____

FEES AND CONTRACTUAL OBLIGATIONS CONTINUED

CHECK MADE PAYABLE TO: _____

FEDERAL ID NUMBER: _____ OR SOCIAL SECURITY NUMBER: _____

PAYMENT WILL BE (Check one):

- Given to the performer at the end of the performance.
- Mailed to the agency at the above address the day after the performance.

DOES THE PRICE INCLUDE SOUND (Check one):

- YES
 - NO
- If no, then sound will be provided by _____

DOES THE PRICE INCLUDE HOUSING/HOTEL (Check one):

- YES
 - NO
- If no, then how many rooms are needed _____

DOES THE PRICE INCLUDE TRANSPORTATION/TRAVEL (Check One):

- YES
 - NO
- If no, then how is artist arriving:
- Driving Themselves (What type/How many vehicles: _____)
 - University Provided Transportation (Check all that apply):
 - Plane Rental Car Train Picked up
 - Other: _____

TECHNICAL INFORMATION

WHAT KIND OF POWER SOURCES ARE NEEDED AND HOW MANY OUTLETS/CIRCUITS ARE NEEDED:

DO WE NEED TO PROVIDE GENERATORS OR IS THAT INCLUDED IN PRICE:

CAN THE AGENT/REPRESENTATIVE FORWARD A TECHNICAL RIDER and/or STAGE PLOT:

WHAT EQUIPMENT WILL THE ARTIST BRING WITH THEM:

WHAT EQUIPMENT IS EXPECTED THAT THE HOSTING GROUP PROVIDE:

PROMOTIONAL INFORMATION

WHAT PROMOTIONAL MATERIALS ARE PROVIDED, IF ANY:

EXTRAS OR OTHER UNIQUE INFORMATION



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BUDGET PLANNING WORKSHEET

THIS FORM IS NOT REQUIRED FROM THE STUDENT ASSOCIATION OR THE STUDENT ACTIVITIES AND UNION SERVICES OFFICE FOR PLANNING YOUR EVENT, BUT IS RATHER A GUIDE FOR YOUR GROUP WHEN BUDGETING YOUR EVENT.

I. Professional Fees	Estimated Cost	Actual Cost
Artist	_____	_____
Agent	_____	_____
Other	_____	_____
Other	_____	_____
Comments:		

II. Physical Requirements	Estimated Cost	Actual Cost
Space Rental	_____	_____
Sound	_____	_____
Lights	_____	_____
Staging	_____	_____
After Hour Charges	_____	_____
Labor Crew	_____	_____
Electrician	_____	_____
Custodial	_____	_____
Technician Wages		
_____person(s) @ \$_____ /hour	_____	_____
Misc. Wages		
_____person(s) @ \$_____ /hour	_____	_____
Other:	_____	_____
Comments:		

III. Contract and Rider Requirements	Estimated Cost	Actual Cost
Lodging	_____	_____
Food/Hospitality	_____	_____
Transportation	_____	_____
Special Instruments	_____	_____
Piano Tuner	_____	_____
Reception Costs	_____	_____
Other:	_____	_____
Comments:		

IV. Promotion	Estimated Cost	Actual Cost
Posters	_____	_____
Flyers	_____	_____
Campus Newspaper	_____	_____
Local Newspaper	_____	_____
Radio	_____	_____
Banners	_____	_____
Buttons	_____	_____
Comp. Tickets	_____	_____
Balloons	_____	_____
Mailings	_____	_____
Electronic Message Board	_____	_____
Other:	_____	_____
Comments:		

V. Additional Charges	Estimated Cost	Actual Cost
Freight/Delivery	_____	_____
Security	_____	_____
Police Services	_____	_____
Special Insurance	_____	_____
Program Printing	_____	_____
Tickets	_____	_____
Decorations	_____	_____
Damages	_____	_____
Other:	_____	_____
Comments:		

V. TOTAL EXPENSES	Estimated Cost	Actual Cost
Add All Lines From Above	_____	_____

VI. INCOME AND TICKET SALES REVENUE	Estimated Cost	Actual Cost
Estimated Income		
_____ students @ _____	_____	_____
_____ non-students @ _____	_____	_____
Subsidy/Group Contribution	_____	_____
Additional SA Funds Supporting Event	_____	_____
Other	_____	_____
TOTAL INCOME	_____	_____
Comments:		

VII. BALANCING THE BUDGET		
Total Expenses (From Section V)	_____	_____
Total Income (From Section VI)	_____	_____
Profit / Loss	_____	_____
Comments:		



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Event Evaluation Form

In order to help future events and students in your position, please complete this form within three weeks of the end of your program. Please return this form to the Office of Student Activities and Union Services and we will keep it on file for the future.

EVENT SPECIFICS:

PROGRAM TITLE: _____ STUDENT CLUB: _____

STUDENT NAME: _____ DATE: _____

DAY OF WEEK (Circle one): MON TUE WED THU FRI SAT SUN

TYPE OF EVENT: _____ PROGRAM DATE: _____

PROGRAM LOCATION: _____ EVENT START TIME: _____

RAIN LOCATION (IF OUTSIDE): _____ SET-UP TIME: _____

REPORT OF EVENT:

Which of the following methods of marketing did you utilize for this event (check all that apply):

- | | | |
|----------------------------------------|------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Posters | <input type="checkbox"/> Electronic Sign Board | <input type="checkbox"/> E-mail |
| <input type="checkbox"/> Table tents | <input type="checkbox"/> TV Station | <input type="checkbox"/> Radio Station |
| <input type="checkbox"/> TV Bulletin | <input type="checkbox"/> Banner | <input type="checkbox"/> Sidewalk Chalking |
| <input type="checkbox"/> Word of Mouth | <input type="checkbox"/> Novelty Giveaway | <input type="checkbox"/> Other _____ |

What services did you contract out for this event (check all that apply):

- | | | |
|--------------------------------------------|-------------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Food Service | <input type="checkbox"/> Electrician | <input type="checkbox"/> Custodial/Facilities |
| <input type="checkbox"/> University Police | <input type="checkbox"/> AV/TECH/Media Services | <input type="checkbox"/> Tickets |
| <input type="checkbox"/> Sound | <input type="checkbox"/> Lights | <input type="checkbox"/> Other _____ |

EVENT EVALUATION:

What type of learning and/or experiential outcomes were developed from this program (check all that apply):

- | | | |
|--------------------------------------------------|-------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Multicultural Awareness | <input type="checkbox"/> Educational | <input type="checkbox"/> Social and Personal Interaction |
| <input type="checkbox"/> Global Perspectives | <input type="checkbox"/> Alcohol/Drug Awareness | <input type="checkbox"/> Personal Development |
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Other _____ | |

How many people came to your event: _____

What were accomplishments and weaknesses of this event?

What recommendations would you have for future planners of a similar event?

BUDGET REVIEW:

Total Expenses: _____	Total Revenues and Sales: _____
Other Income/Funding: _____	Net Profit/Loss: _____