

DEPARTMENT EVENT PLANNING TOOL KIT

Purpose:

To provide instructive guidance and tools to departments planning an event that is not directly supported by CAS-Events and/or CAS-Marketing. This document can not only guide event planning but serve as a task completion checklist. Supporting resource documents are accessible here: <https://usf.box.com/s/z35qdu3ln14h7a1g95lmjrhlc22l8hj6>

Timeline/Checklist: Please note these are suggested time frames and may vary based on circumstances.

9-12+ Months

- Determine Event Date
 - Establish alternative date
- Clarify Event goals, objective and purpose
- Engage supporters
 - Community
 - Graduate and Undergraduate student groups
 - Other USF departments
- Consider Event Format
 - Live/In-person
 - Virtual
 - for more information, see virtual event tool kit: <https://usf.app.box.com/file/750755360463>
 - Teams Meeting
 - Teams Live Event
- Create Budget/Secure Funding – See attached template for use
 - What are the sources of funds?
 - Grants
 - Participant fees
 - Donations/Sponsorships/Community partners
 - USF department support
 - What are the costs?
 - Live/In Person
 - Speaker Honorarium
 - Note: USF policy limits the amount spent on and style of travel and hotel accommodations. For the flexibility to allow the speaker to travel and secure accommodations as he/she chooses, negotiate an increased honorarium that covers these expenses paid directly by the speaker.
 - Travel
 - Speaker travel
 - Ground transportation
 - Venue
 - Audio Visual (A/V)

- Food and Beverage
- Parking
- Marketing Promotion
- Décor
- SWAG
- Virtual – Virtual events eliminate many of the costs listed above making funds available for (highlighted items will remain):
 - There is more information regarding virtual events in a separate tool kit
 - Production company – consider using a production company to deliver a professionally produced event
 - Delivered food/treats/SWAG
- If your costs exceed available funding, what are your options?
 - Additional sources of funds
 - Ways to reduce expenses
- Attendance
 - Number and composition
 - Faculty
 - Staff
 - Students
 - Community Members: Local/travelers
 - VIPs
 - Do any of your guest have special needs?
 - How does the number and composition of attendance affect the budget?
- Consider agenda items that impact budget, decisions, flow of the day
 - Number of speakers
 - Registration/check-in
 - Meals/receptions
- Reserve Venue
 - Considerations:
 - Capacity needed
 - Types of activity occurring in this space
 - Room set ups based on those activities
 - AV needed
 - Options
 - On Campus - frequently used options below:
 - Alumni Center/Traditions Hall
<https://www.usfalumni.org/s/861/02alumni/index.aspx?sid=861&gid=1&pgid=290>
Depending on conference purpose, there may be a fee
Full service
 - Marshall Student Center: contact varies by department
<https://www.usf.edu/student-affairs/msc/>
Full service

Fee based: may be quite expensive if event deemed off campus event

Various spaces to meet event needs

- CWY: Lori Matthews: lorimatthews@usf.edu
<https://www.usf.edu/undergrad/jmlc/cwy-event-space-rental/>
 - Fee based after business hours
 - May not be available specific days due to use as classroom
 - Full service
 - Depending on size needed up to 4 breakout rooms available
- TECO Hall:
<https://www.usf.edu/education/anchin/contact/teco-hall.aspx>
- Other campuses:
 - St. Pete Campus: <https://www.stpetersburg.usf.edu/student-life/university-student-center/plan-your-event/index.aspx>
 - Sarasota-Manatee Campus:
<https://www.sarasotamanatee.usf.edu/events/event-venues.aspx>
- Off Campus – multiple options
- Speaker: Select speaker(s)
 - Contract negotiation
 - Processing through supplier and contract management

6-9 Months

- Determine Registration Process
- Create marketing plan
 - Assets needed – consider
 - Flyer
 - Invitation
 - Program/Abstract
 - Signage:
 - Wayfinding
 - Check-in
 - Labeling
 - Tent cards
 - Timeline
 - For access to branded templates for marketing assets:
<https://usf.app.box.com/folder/115871210631?v=casrebrandrollout>
- Create Landing Page if needed
- Send Save the Date if needed

4-6 Months

- Set up registration site
 - If there is a participant fee
 - Complete EBA
- Follow Marketing plan timeline
- Determine need for and sources for volunteers

- Determine on-site check-in process
 - Student Sign in Swiper
 - MariaJose Cardenas mariajosec@usf.edu
 - Link to form: https://usf.az1.qualtrics.com/jfe/form/SV_9tck7Ti07D3Yw3H
- Arrange event logistics
 - Food and Beverage:
 - What caterer would you like to use?
 - Aramark
 - <https://usfcatering.catertrax.com/>
 - Other
 - Contact venue for outside caterer guidelines
 - Meals, reception, are you providing? Bar (?)
 - Décor:
 - Cas-events has a décor inventory for use by checkout:
 - contact: cas-event@usf.edu
 - Is there a need for stage décor: plants, podium, etc.
 - Linen Options
 - Aramark \$8 white or black
 - Events linens \$8 for gold or spring green – see attached checkout form
 - Rental companies: Over-the-Top Rental Linens
<https://www.overthetopinc.com/cgi-bin/customers/contact.cgi>
 - Plan Centerpieces and registration or bar decor
 - Rental Services: Recommended Vendors
 - Photographer:
 - JWS Photography Jarvis Walker
 - Website: <https://www.jwsphotographystudio.com/>
 - Email: jwsphotography@outlook.com
 - Tables and Chairs:
 - On campus:
 - USF Administrative Services: see attached forms
SCM-Events@usf.edu
Wayne Wilcox at 974-5201 or Hollie Chancey at 974-7189
 - Off campus:
 - Fiesta Solutions - <https://fiestasolutions.net/>
Contact: info@fiestasolutions.net
 - Plant Rentals:
 - Plantz - <https://www.plantz.us/>
 - Contact: inbound@plantz.us
 - Other vendor resources:
 - SF Foundation Vendor list:
<https://foundation.usf.edu/here/events/helpful-links>
 - Office of Supplier Diversity: osd@usf.edu
 - Parking and Transportation
 - Tampa Campus: <https://www.usf.edu/administrative-services/parking/>

- Parking (required) Options:
 - Reserved spaces: \$10/space for up to 10, then \$5/space thereafter
 - Lot access: \$2.50 per space
 - Signage: \$10 per sign (optional)
- Bull Runner: <https://usf.edu/administrative-services/parking/bull-runner/index.aspx>
- Book Speaker Travel and accommodations, if needed
- Ground Transportation
 - Walsh Airport Service
<http://walshairportservice.com/> (813)960-3884
- Other Campuses:
 - St. Pete Campus: Randy Pogue USFSP Parking Services Supervisor poguer@mail.usf.edu
Link: <https://www.stpetersburg.usf.edu/resources/administrative-and-financial-services/auxiliary-services/event-parking.aspx>
 - Sarasota Manatee Campus:
Link: <https://www.sarasotamanatee.usf.edu/campus-life/campus-resources/parking-services/special-event-parking.aspx>
- Track Vendors through supplier management, contract management and payment processes

60 Days

- Create Day of timeline and supply lists
- Follow marketing plan timeline

10-30 Days

- Finalize floorplans and AV needs with Venue
- Ensure all forms required by Venue are submitted
- Create volunteer schedule and job assignments/descriptions
- Follow marketing plan timeline

10-Day prior

- Provide shot-list to photographer
- Determine final attendance numbers
- Communicate with volunteers to confirm attendance
- Pick up borrowed supplies
- Provide final attendance numbers to caterer

Event Day

- Pack for event
- Event Set up
- Instruct and supervise volunteers
- Meet with Venue AV and/or test AV
- Execute Event
- Event clean up

Post Event

- Complete any post event tasks included in marketing plan
- Ensure all vendors are paid
- Reconcile budget
- Return borrowed supplies
- If this is an annual event, choose next year's date and reserve venue

EVENT PLANNING BEST PRACTICES

- ✓ Be creative: create events that reflect your department's culture and uniqueness
- ✓ Be resourceful: engage with USF and community partners to improve your events
- ✓ Think Ahead: refer to this timeline, meet internal deadlines; meet external and/or vendor deadlines
- ✓ Walk through your event from your guests' perspective: this will improve event flow and details
- ✓ Communicate event details to vendors: this will help them serve you better
- ✓ Refer to event records: refer to records of prior or similar events as reference for budget information and planning details.
- ✓ Create and Monitor the budget: on a total basis and a per person basis