

EVENT PLANNING MANUAL Lesley University

This manual is designed to help those planning events on the Lesley campus. It outlines the arrangements that need to be considered and details the methods for implementing these plans. Although the manual focuses on events held on campus, the planning process for events held off-site is similar and can be adapted from this document as well.

Event Approval

Any individual employed by Lesley University wishing to hold a University sponsored event must receive approval from the appropriate Dean or Vice President. There is no rental charge for campus space used for Lesley sponsored events. Room reservations should be made directly with the Registrar's office.

Lesley University space may be rented by outside organizations. All inquiries must go through the Conferences and Events Office to determine availability and rental rates. Once an outside organization has been approved, a contract must be signed and liability insurance secured.

In general, no admission fees can be charged for events on the Lesley campus. This included both Lesley sponsored events and those run by outside organizations. However, special charges are allowed for conferences and workshops where speakers' fees and other expenses must be covered, but must be approved by the Vice President of Finance. Any fees approved must be collected through pre-registration; money may not be collected at the door.

Using This Manual

The manual is divided into five sections based on the amount of time prior to the event that arrangements need to be made. Each topic within the first two sections gives you arrangements to consider, then methods for implementing the arrangements. The final three sections assume that all of the decisions have been made and provide a "to do" checklist:

Section 1: 4-6 months prior to event (depending on size, duration and complexity of event)

Section 2: 2-3 months prior to event (depending on size, duration and complexity of event)

Section 3: 2-3 weeks prior to the event

Section 4: 1-2 days prior to the event

Section 5: 1 month after the event

Section 1: 4-6 months prior to event

(depending on size, duration and complexity of event)

Conferences and Events Office

Consider

- Contact the Conferences and Events Office to help with the planning process.

Implement

- The Coordinator is available to provide assistance in the following areas:
 - ~creating a budget
 - ~coordinating with campus departments
 - ~choosing menus
 - ~determining room set-ups
 - ~developing the timeline and "flow" of the event
 - ~solving problems specific to your event
 - ~communicating with speakers
 - ~finding and negotiating with hotels and outside vendors
 - ~developing a registration procedure
 - ~designing evaluation procedures

Space Reservations

Consider

- Date(s) of event. Set-up and breakdown time for event. Start and end time of event. Back-up date in case first choice is unavailable.
- Number of attendees.
- Number of rooms. Include space for exhibitors, registration, food, and breakouts.
- Accessibility for the physically challenged.
- Computer labs, dance studios, art studios.

Implement

- Request a *Lesley University Facility Information Guide* from the Registrar's Office. Information includes the number of people each space accommodates, a description of furniture and audio-visual equipment in the room, and accessibility for disabled participants.
- Contact the Registrar to request rooms at "rooms@mail.lesley.edu". Request specific rooms or provide the number of people that must be accommodated in

each room and any furniture preferences. Include the dates and times of use. Include name of event, sponsoring department or school, and contact name and phone number.

Allow 1 hour prior to event for set-up and 1 hour after event for break down.

- To reserve the Instructional Computing classrooms (Library 301, 401 & 403), contact the Instructional Computing Services Coordinator with the following information: date, time, hardware and software requirements, any special arrangements.
- Review your confirmation from the Registrar's Office for accuracy

* University policy dictating the order of priority for room assignments is as follows: first priority goes to classes and annual events on the academic calendar, second priority to Lesley University sponsored events, and third priority to outside organizations renting Lesley space. Within this prioritization process, rooms are reserved on a first come, first served basis. Put in your request as soon as your needs are known since once classrooms are assigned, the event requests will be filled in the order they were received.

If you cancel your event for any reason, inform the Registrar's Office as soon as possible so the space can be rescheduled.

Budget

Consider

- Possible Expenses
 - speaker expenses (honoraria / air travel / car rental / car mileage / hotel / meals)
 - programs or fliers (design / printing / mailing)
 - food
 - outside rentals (furniture / lighting / audio-visual equipment)
 - flowers
 - decorations
 - entertainment
 - transportation
 - staff compensation
 - supplies (name tags / folders / office supplies / computer software for registration/
flier design or list management)
 - photocopying (handouts / registration materials / tickets / fliers)
 - postage (fliers / registration materials / correspondence to speakers or
participants)
- Possible Revenues
 - registration fees

-exhibitor fees

Implement

- Submit budget to Dean or Department Director for approval.
- Submit final budget to Vice President, Finance for approval.

Marketing and Publicity

Consider

- Determine the best ways to get the word out about your event.
 - ~your own mailing list
 - ~buy lists from other sources (e.s. the State Department of Education)
 - ~lists of members of related professional organizations
 - ~professional magazines or newsletters where announcement can be placed, as well as calendar sections of local newspapers
 - ~Lesley Today article
 - ~newspaper/television coverage
 - ~list event on "Calendar of Events" page of Lesley Web site
 - ~create an event web page on Lesley site
 - ~list event on related Web sites
 - ~list event in Alumni Office Newsletter
 - ~invite students to attend
 - ~people in the field who can help to spread the word, and distribute fliers
 - ~attend related events where you can announce event or distribute fliers

Implement

- Contact professional organizations and journals for submission deadlines.
- Lesley Today, the University newspaper, is published electronically every other Wednesday. Call or email the Office of Public Affairs ("publicaffairs@mail.lesley.edu") with information on your event so it can be publicized.
- Media coverage is sometimes desirable for events that have interest to those outside of Lesley. Contact the Office of Public Affairs ("publicaffairs@mail.lesley.edu") to discuss a publicity strategy.
- Submit your event on the University's Calendar of Events by accessing "http://www.lesley.edu/events_form.html"
- To get information on creating an event Web site contact "webadmin@mail.lesley.edu".
- Contact the Alumni Office for a schedule of their newsletter and deadline submission dates (alumni@mail.lesley.edu).
- Contact the Office of Student Development for a publication schedule of the

Undergraduate Calendar and submission deadlines.

Brochure, Program or Flier Production

Consider

- Type of piece that will best publicize the event.
- Information that must be included.
- Design and production. Do it yourself or hire someone.
- Time frame for sending piece out (and receiving responses if applicable).
- Method for distributing pieces.
- If mailed, will they be sent bulk mail from a mailhouse or first class from the University mailroom? If using a mailhouse, talk to Lesley mailroom supervisor about requesting postage from your budget to be deposited into the University's bulk permit account at the Post Office. If mailed from campus, speak to the mailroom supervisor about the most efficient methods, size, sealing and delivery requirements.

Implement

- To hire a designer and/or printer, contact Public Affairs ("publicaffairs@mail.lesley.edu") for a list of professionals and suggestions for working with them.
- If creating your own flier, make sure to include the following information:
 - date of event
 - time of event
 - location of event
 - information on speakers
 - information on exhibitors
 - directions to campus
 - transportation options
 - parking arrangements
 - registration procedures
 - cancellation policies
 - professional development points or course credits
 - Web site address
 - contact for further information
 - Lesley logo (www.lesley.edu/logo.html)
- Contact the Office of Public Affairs to review fliers you produce and offer design suggestions.

Registration Process

Consider

- Will participants need to register or just walk in and attend. If they need to register, will it be ahead of time, or when they arrive on the day of the event.
- If registering ahead of time, consider the following:
 - ~ How will you get registration forms to interested participants? Will they be included in the event flier? Will people respond to the event flier via phone, email or fax to request a form? Will you fill this request by mail, email or fax? Will you have a form available for downloading from your Web site?
 - ~ Will you send them any confirmation of their registration?
 - ~ Will you send the necessary entrance ticket(s) ahead of time, will they pick them up when they arrive?
- If registering participants on the day of the event, consider the following:
 - ~ If the participants have choices of sessions, what will you do when a participants' choice is full?
 - ~ What will you do if more people attend than you have room for?
 - ~ Will you have enough staff on hand to handle the registration of the participants since they will all arrive around the same time?

Implement

- Design a registration procedure that flows smoothly and produces all the records you need. Some of the issues to address:
 - ~ Where will you permanently record participant's name, address, phone, etc...?
 - ~ If participants need to choose from multiple offerings, what will you give them to indicate the sessions they are attending and where will you record this information?
 - ~ If a fee is charged, where will this be recorded?
 - ~ If the participants will be receiving nametags, will you make them up ahead of time and send them, have them available on the day of the event, or provide blank ones to be completed by the participants?
 - ~ If participants are registered ahead of time, will they need to register again on the day of the event? Will they need to pick up any materials?
 - ~ If participants register on the day of the event, what materials do you need to have ready to give them?
 - ~ Make sure all registration information is clearly stated in the flier and/or on the registration materials, especially cancellation procedures or refund information.

Speaker Arrangements

Consider

- Set honorarium.
- Determine hotel arrangements.
- Determine meal, mileage and transportation budget per speaker.
- Decide if speakers will pay their expenses and then get reimbursed or if you will pay expenses up front.
- Who will duplicate handouts for event, the speaker or your office?
- What audio-visual needs do the speakers have?

Implement

- Confirm in writing the day, date, time and topic of presentation.
- Confirm in writing agreements for meal, mileage, travel and car rental reimbursements.
- Confirm travel arrangements. If they are making their own arrangements, make sure you know details.
- For air travelers, arrange transportation to and from the airport.
- Confirm special equipment requests (microphones, AV equipment, flip-charts, etc...)
- Confirm whether speaker will bring enough handouts (provide amount), or your office will make them. If the latter, request a master photocopy ahead of time.
- Confirm hotel reservations, whether they were made by you or the speaker.

Exhibitors

Consider

- Determine location for exhibitors, size of space offered, furniture offered, rental fee.

Implement

- Contact appropriate exhibitors with above information and reply deadline.
- Make arrangements with Security for a place for exhibitors to park temporarily while dropping off their materials.

Housing

Consider

- Do your attendees need housing? Consider local hotels, B&Bs and University Residence Halls.

Implement

- For suggestions on hotels and B&Bs, especially those with rate agreements with the University, contact the Conferences and Events Office.

- Residence Hall space is not available during the school year, but may be during summer months. Contact the Office of Residence Life for information.

Teleconferencing

Consider

- The Kresge Center has the capability to receive (downlink) live national and international teleconferences that are broadcast by satellite. Most teleconferences invite interaction via phone or fax from the receiving site. Interactive conferences can be received and supported in the Kresge Center studio or the Marran Theatre. Non-interactive conferences can be received in most classrooms.

Implement

- Book space with the Registrar's Office. Email "rooms@mail.lesley.edu". Include 1 hour prior to conference for set-up one hour after to break down. If interested in the Kresge studio (capacity 20), reserve directly with the Kresge Center.
- Call originating organization of the teleconference to get the following information:
 - ~Registration procedure and cost to receive conference. Does fee include right to record program?
 - ~Satellite coordinates on program to be broadcast.
 - ~Advice about hosting and promoting conference, request promotional packet.
 - ~Will there be an interactive component? Phone, Fax, Email?
- Call the Kresge Center for the following:
 - ~Reserve equipment.
 - ~Provide Kresge with name, date, time and satellite coordinates of conference.
 - ~Request phone or fax to be set-up for interactive conference.
 - ~Request video recording if fee includes this right.
 - ~Arrange for tape to be put on reserve in library if you want it available to the Lesley Community. Include tape and licensing agreement.
 - ~Learn how to monitor equipment and room systems during the event.
- Submit work order to Physical Plant to deliver equipment to teleconference location.

Tips for Hosting a Teleconference

When hosting a teleconference, it is important to have the following procedures in place:

- A. Designate a person to serve as a contact with the Kresge Center and to learn how to monitor the equipment and manage the space.
- B. Verify with Kresge that equipment is set-up and program signal is being received.

- C. Post sign with phone/fax number and coordinate phone/fax-in questions.
- D. Publicize the event to begin 15 minutes before actual teleconference begins so there is time to introduce the conference and explain the interactive procedures.

Internet Access

Consider

- Most classrooms on campus are wired for internet access.

Implement

- Contact the Office of Information Technology ("oit@mail.lesley.edu") for policies and procedures related to Internet access.

Parking

Consider

- Parking is extremely limited on the Lesley University main campus, and there is no parking available at Porter Exchange, Porter North or AIB.
- Parking is most limited Monday through Friday from 9:00 - 5:00, when University staff is working, and Monday through Thursday nights until 10:00 p.m., when graduate classes are in session.
- Parking is most available from Friday at 5:00 p.m. through Sunday night and during school vacations when the classes are not in session.
- A shuttle bus runs between Porter Exchange and Mellen Street, and AIB and Mellen Street. Contact the Director of Operations or Security regarding the shuttle schedules.
- Parking for 8-10 speakers can usually be arranged.
- Is parking needed or will attendees use public transportation, hired bus or walk?
- Can you encourage or arrange carpooling to minimize parking needs?
- Check event date for conflicts with other events needing parking.
- Are arrangements necessary for exhibitor unloading and parking?

Implement

- Request parking arrangements from Director of Security. Include dates / times / locations / number of spaces requested.
- When directing participants to campus, it is best to direct them to one central place. Maps to the University are available on the University Web site "www.lesley.edu/dir.html" and direct people down Mellen Street.
- Schedule security guard to help with parking (1/2 hour prior to event start to 1/2 hour after event begins).

Additional Staff

Consider

- Additional staff necessary to prepare for the event.
- Additional staff during the event.
- Will staff consist of volunteers, students or paid workers?
- If staffed by volunteers, what will you offer to both attract and thank them?
(Suggestions-if event requires a fee, let them attend some sessions for free. If no fee, have an informal breakfast or post-event coffee hour to thank volunteers.)

Implement

- To hire staff, contact Lesley's Human Resources Department ("hr@mail.lesley.edu") to inquire about the temporary employee pool.
- To solicit volunteers, contact your planning committee and related professional organizations.
- For student volunteers, contact the Office of Student Development and Office of Residence Life and ask them for ideas on spreading the information to students.

Section 2: 2-3 months prior to event

(depending on size, duration and complexity of event)

Food Service

Consider

- Arrangements for meals, snacks or coffee breaks.
- Style of meal service - served by waitstaff, buffet or boxed meal.
- Special dietary considerations.
- Is space reserved adequate to accommodate food service or does additional space need to be reserved?

Implement

- Discuss your plans with the Catering Manager. Complete a preliminary requisition for each food/beverage event and deliver to the food service office. Include: date of event / time for completed set-up / time for break down (reserve room one hour prior to and after event to allow set-up and breakdown) / exact menu / style of service / china or paper / linen and skirting / estimated number of attendees (finalize 3 days prior to event) / bartender, liquor.
- *Note that outside organizations are required to pay a 50% deposit with the balance due on the day of the event.
- Make sure you have included a Physical Plant work order requesting the tables for the food to be set on. Order tablecloths from food service.

*Some large events may request that a meal be served exclusively for their group in the dining hall. This may be arranged as long as your event schedule is flexible and you can plan your meal around the regular student meal times. This needs to be discussed with the Catering Manager and the Director of Residence Life as far in advance as possible.

If you are not planning meals for your participants but suggesting they eat in one of the cafes or the dining hall, inform the Food Service Manager at least a week in advance of the number of increased diners they can expect. This will allow them to plan food and staff accordingly.

Security

Consider

- Will you need rooms unlocked earlier than normal?
- Do you have special security needs such as a guard near a bar or someone available to walk participants to their cars late at night?

Implement

- If you arrive early for your event and the doors are locked, Security will open them for you. Have copy of your space confirmation to verify your reservation.
- Discuss any special security requests with the Director of Security.

Audio-visual Equipment

Consider

- Contact the Kresge Center for a list of audio-visual equipment available.
- Determine audio-visual equipment and microphone needs of speakers.

Implement

- Inform the Kresge Center of event date and reserve equipment needed.
- Request Physical Plant deliver / pick-up to/from room. Provide a diagram or description of exactly where you want equipment placed. Include extra time for set-up in your delivery request.
- Arrange to have Kresge show a member of your staff or volunteer how to use any equipment you will need.
- If you need an on-site technician, contact Kresge Center for suggestions of technicians for hire.

Outside Rentals/Purchases

Consider

- Does the University own and have available the type of furniture and equipment you need for your event? Think about the kinds of tables you need for meals (round or rectangular), lighting and/or sound in the Marran Theatre for performances, audio-visual needs for your meetings.
- Do you need flowers, balloons, bands, DJ's, t-shirts, buttons, Lesley logo items?

Implement

- Contact the Conference and Events Office to get suggestions of vendors and logo items catalogs.
- Make sure to order specially made materials at least 6 weeks in advance of your event to allow enough time for creation, proofing, printing and delivery.

Evaluation Procedures

Consider

- What information would be important for you to learn from your attendees and speakers?
- Determine how participants are going to give feedback on the event. Printed evaluation forms may be placed in registration packets or available at a central location at the event site.

Implement

- Create an evaluation form. Contact the Conferences and Events Office for sample forms or to review your document.

Supplies

Consider

- Determine what supplies you will need both during the preparation of the event and during the event itself. Below are some standard supplies to consider:

- ___ name tags
- ___ folders with pockets
- ___ computer paper, printer ink cartridges, software
- ___ envelopes with University return address
- ___ overhead projector sheets/pens
- ___ flip chart pads
- ___ scissors
- ___ masking tape
- ___ heavy markers
- ___ pads of paper and pencils/pens

- rubber bands
- stapler/staples
- paper clips

Implement

- Order supplies at least 3 weeks in advance of when you will need them to make sure the delivery is accurate.

Section 3: 2-3 weeks prior to the event

Physical Plant Work Orders

- Complete separate work order for each space to be set.
- Allow at least one hour before event to set-up and one hour after to clean up.
(Make sure the times the rooms are reserved reflect this.)
- Specify exact number of chairs and tables as well as the configuration they should be arranged in. Plan for a few extra participants.
- Include table and chair at front of room for speaker and/or table in rear for materials.
- Include tables for food or beverages and describe where they should be set.
Check room for electrical outlet locations before deciding this.
- For complicated set-up, attach a sketch on the work order.
- A limited number of flip-charts may be reserved through Physical Plant.
- Request Physical Plant to pick up media equipment reserved at Kresge, deliver it to your rooms, then return it after event.
- For exhibitor area, indicate the number of tables needed and how they should be configured. Make sure Physical Plant has enough tables and chairs, if not, additional tables can be rented. Department planning the event incurs cost.
- List directional signs to be set-up on campus pointing to various rooms being used for event. Indicate what signs should say and location for placement.
- For multiple or complicated set-ups, make appointment with Physical Plant to review work orders in person.

Food Service Requisitions

- Tentative arrangements should have been made. Finalize your requests.
- Complete separate requisition for each food set-up.
- Allow 1/2-1 hour before the event for set-up depending on amount of food. Allow one hour after event to clean up. (Times rooms are reserved should reflect this.)
- Talk over your food service requirements with the Catering Manager to make sure they are workable and within budget before submitting a requisition.
- A Lesley University requisition must be submitted prior to the date of service to insure

- delivery. The requisition must be signed and include the department budget number.
- Requisitions should be detailed. Include date, location, time food should be set, time event starts, list of specific foods and beverages, service on china, plastic or paper. All food display tables will be covered in linen tableclothes.
- If skirting and tablecloths are desired, it may be ordered through the Catering office. If tables for registration, speakers, materials, etc... need to be covered with linen, it must be ordered at least 10 days before the event through the Catering office. Make sure to specify the size of the tables to be covered/skirted. Note there is an additional charge for linens and skirting.
- If liquor will be served, it must be discussed with the Catering Manager ahead of time. Liquor may only be served at a Lesley sponsored event. It may not be served at an event sponsored by an outside organization renting Lesley space.
 - ~ All liquor must be ordered and paid for directly by the event.
 - ~ The Dining Service may provide a bartender for a fee. The cost of this must be incurred by the event budget.
 - ~ Liquor can be delivered to the Dining Service for chilling and service.
 - ~ If minors will attend event, liquor may not be served unless monitored by requiring all persons requesting liquor to provide identification.
 - ~ Participants and event organizers may not bring liquor to any event.
- Off-campus organizations requesting food service may make arrangements with, and pay, Dining Services directly. Partial payment in advance is required. Credit cards are not accepted for payment.
- It is recommended that a copy of your events final schedule be given to the Catering Manager to facilitate appropriate and timely set-up.

Final Audio-visual Requests

- Tentative reservations should have been made. Finalize your requests.
- Request Physical Plant, through a work order, to pick up media equipment, deliver it to your rooms, and return it after the event. Allow time for set-up of room and equipment.
- Make sure a member of your staff is familiar with operating the equipment.
- The Kresge Center can provide training to a member of your staff or designee.
- The Kresge Center can suggest rental companies for equipment and projectionist services.

Photocopying of Handouts and Registration Materials

- Handouts and registration materials can be duplicated at the University document center. Make extra copies of all materials.

- For large quantities of copying, contact document center two weeks prior to date work must be completed to negotiate appropriate time frame. Job Request forms and Document Center Handbooks may be obtained during business hours.
- Many specialized services are available from the document center. Contact them for details.
 - Arrange for photocopies to be completed with enough time to check for accuracy and numbers.

Confirmation of Security and Parking Arrangements

- Confirm arrangements previously made with the Director of Security about parking, security guards and any security issues. Inform the Director of any changes made and follow-up in writing or by email.

Confirmation of Speaker Attendance and Travel Arrangement

- At times speakers change travel plans, develop schedule conflicts or realize they need audio-visual equipment. Contact them and confirm location, time and topic of their presentation, as well as their travel plans.

Confirmation of Exhibitors Attendance

- Confirm attendance and give instructions for unloading and parking.

Confirmation of Volunteers for the Event

- Call volunteers to confirm time, location and responsibilities during event.

Section 4: 1-2 days prior to the event

Confirmation phone calls:

- Security/parking
- Physical Plant
- Food Service (give them a final participant count in writing)
- Kresge Center
- Outside rental companies
- Volunteers

Other things to do

- Make sure handouts are ready and in packets or ready for distribution at the door or in the session. Determine who will be responsible for distribution.

- Gather supplies needed for event. Masking tape, scissors, stapler, rubber bands, paper, pens, thick markers, maps of the area, extra nametags and event fliers.
- Make copies of lists, records and materials needed the day of event.
- Inform switchboard where to direct calls. If nobody will be in your office to receive calls the day of the event, leave a detailed message on the voicemail with instructions to participants.

Section 5: 1 month after the event

Congratulations! You have now completed a successful event. It's time to tie up the loose ends and thank the people who helped make it all work.

- Write thank you letters to speakers
- Write thank you letters to exhibitors
- Write thank you letters to Lesley staff members and service departments that were involved
- Write thank you letters to volunteers
- Pay bills
- Meet with event staff (and possibly Lesley people involved in the event) to evaluate the event. Discuss things that went well and those that should be done differently next time. Make sure to record all this information.