Planning and Executing a Successful Event

1. Once the idea is for an event is created - set a reasonable date
   - The amount of time needed for planning increases with the size/complexity of the event, so plan accordingly (minimum amount of time should be 3 weeks)
   - Double check the concert calendar and event calendar to minimize potential conflicts
   - Submit the PRF (min. 3 weeks in advance)

2. Contact all necessary parties/vendors at LEAST 3 weeks prior to the event
   - If anything is needed from Facilities, call 585-273-4567, and ask for a follow-up email reviewing everything that was discussed
   - If booking a food truck, we need the following forms:
     - A copy of the Certificate of General Liability Insurance, also evidencing Worker’s Comp and NYS Disability Coverage
     - A copy of the Certificate of Auto Insurance
     - A current Monroe County Health License for the event, which must also be displayed in the vehicle and/or in the truck’s set-up area
   - If booking a performer (musician), we need the following forms from them:
     - A UofR W9 - only applicable if the performer(s) do not already have a W9 filed with the University (TA positions DO NOT COUNT)
     - A completed/signed Performance Contract
   - If booking an independent contractor (any individual who is not a musician - photographer, massage therapist, henna artist, etc.), we need the following forms from them:
     - A UR W9 - only applicable if the performer(s) do not already have a W9 filed with the University
     - A signed Independent Contractor Certification Form
   - If having catered food, we need the following forms:
     - A copy of the Certificate of General Liability Insurance, also evidencing Worker’s Comp and NYS Disability Coverage
     - A copy of the Monroe County Issued Catering Permit
     - A copy of the Current Food Safety Certification for at least one food handler
     - Also, submit a UR Catering Waiver Application Form (through Environmental, Health, & Safety) to Peter Castronovo – if it is NOT one of the University’s “Approved Caterers” https://www.safety.rochester.edu/sanit/approvedcaterers.html
   - If alcohol is being served, we need the following forms:
     - A copy of the Liquor Liability Insurance
     - A copy of the NYS Liquor License
     - UR Bar Event Contract
   - If booking a venue, we need the following forms:
     - A completed/signed Venue Contract
   - If booking an Off-Campus event that is more than 25 miles away, we need the following forms:
     - Completed Travel Waivers for every student who is signed up/participating
   - If booking an event that involves any physical risk, we need the following forms:
     - Completed Liability Waivers for every student who is signed up/participating
   - If booking an event that involves direct contact with domestic animals, we need the following forms:
     - Complete Vaccination records for every animal
     - A completed UR W9
     - A signed Independent Contractor Certification Form
Event Planning Checklist

(AT LEAST) One month before the event
- Decide on a theme, budget, and date for the event
- Check the date with the concert *and* programming calendar
- Review past PEF forms if applicable
- Submit PRF and discuss the event with Austin
- Begin reaching out to all vendors/parties
- If the event involves outside catering from an unapproved caterer, fill out and submit the Catering Waiver Application Form
- If the event involves alcohol (Seniors and Grads ONLY) then the following forms need to be obtained from the caterer immediately:
  - A copy of the Liquor Liability Insurance
  - A copy of the NYS Liquor License

(AT LEAST) 3 Weeks before the event
- Begin preparing publicity
- Obtain all necessary forms from participating vendors/parties
- If applicable, place any giveaway orders with the Office for Student Activities

2 Weeks before the event
- If publicity materials are ready, put them up in the appropriate places (RA mailboxes, bulletin boards, school, social media, etc.)
- If Sign-ups are necessary, make sure that the office iPad has a sign-up sheet with all of the necessary information (e.g. ticket numbers, equipment rentals, etc.)
- If event requires Travel or Liability Waivers, ensure that they are prepared and printed
- If event requires ticket sales, ensure that tickets are printed/acquired, and ready to be sold
- Set up any requests within the following parameters with the Office of Student Activities
  - Bus Charters
  - Wegman’s Card Check-out
  - Facilities
  - AV Tech
  - Amazon orders
- Decide/finalize which members will be managing/attending the event

1 Week before the event
- Confirm arrival times for all vendors/parties - make sure there are no last-minute requests that need to be taken care of (extra tables/chairs, access to water, students to meet them upon arrival, etc.)
- If necessary/desired, begin tabling for the event
- Assemble all necessary items (decorations, giveaways, supplies, etc.) in one location, and coordinate which member will pick up items prior to the event
- Publicize on social media again
- Assign event volunteers - get contact information for all volunteers (if applicable)

Day of the event
- Confirm all volunteers in the morning (if applicable)
- Meet any arriving vendors/parties
- Ensure that all necessary facilities/AV tech are present and set up
- Set up any decorations/giveaways necessary

Within 1 week after
- Fill out a PEF form (due 3 business days post-event)
- Hold a post-event meeting
- Count ticket stubs and put in labeled envelop in Student Activities Office
- Make sure all invoices have been paid and submit any additional Request for Funds paperwork
- Send “Thank You” notes or e-mails to staff and vendors

** DISCLAIMER:** If any of these steps are missed or incorrectly followed then the event is subject to terminate based on the discretion of the Club Advisor and/or the Assistant Director for Student Activities and Engagement.