Agenda

• Strategize
• Timelines & other event details
• Location
• Feeding the crowd
• Be prepared
Strategize

• Where are we now?
• What do we want to accomplish?
• How are we going to get there?
• How do we know we got there?
Think it through

Identify your SWOT:

- **Strengths**
- **Weaknesses**
- **Opportunities**
- **Threats**
Be SMART About Your Goals

- **Smart**
- **Measurable**
- **Achievable**
- **Realistic**
- **Timely**

Focus on your attendees. They will bring in your vendors, sponsors, and other stakeholders.
Who is your audience?

- What kind of event is this?
- What level of interaction is appropriate?
- What kind of space and technology do you have?
- What kind of visuals would engage the audience during the event?
Interaction

- Apps and surveys connect event attendees.
- Use table top questions to connect guests with each other and get them talking!
- Create a video to be shown at the event.
- Be personable and hospitable.
Attracting students

• Partner with student groups on campus
• Food and freebies
• Give extra credit for students who attend
• Location
  • IUPUI Campus Center first floor atrium is great!
Getting started

- Make plans as far in advance as possible.
- Build your budget.
- Schedules matter
  - Check the campus calendar and school academic calendar for conflicts as you plan your date.
  - Check religious and cultural holidays and make sure your event doesn’t conflict.
  - Make sure that the key people you want to attend, can!
- If there is a guest speaker, gather their information early, including preferred name, title, bio information, talk name, talk description, and high resolution headshot (for promotional materials).
Timelines & other event details

12 months prior to event:

Decide event date, book location, add to calendars, develop timelines/tasks

3-6 months prior to event:

Meet with location reps to discuss room and event details; meet with IUPUI food service (if applicable) to discuss food options/details. Create promotional materials.

6 weeks prior to event:

Mail invitations; send out reminder to participants.

1-3 weeks prior to event:

Confirm food/location details; check in with volunteers/speakers. Gather day-of items.

Event day:

Bring all materials and confirmations to event. Keep contact numbers/phone with you.
Event summary

Create an event summary (planning document) that lists tasks, assigns responsibilities, and includes deadlines.

Update the list as items are completed!
Resources available to you from the Office of Development & External Affairs

- Planning
  - Event planning advice and consultation
  - Promotional support and materials (design fees may apply)
  - Alumni and donor mailing lists

- Décor
  - Liberal Arts table cloth, backdrops
  - Centerpieces
  - Promotional giveaways (fees may apply)

- Day-of assistance
  - Photography (case by case basis)
  - Liberal Arts student ambassadors
Waiver forms

• If your event is being filmed or photographed, place a sign at registration:

*By your attendance, you agree to be videotaped and/or photographed. If you prefer not to be, please let us know so we can seat you accordingly.*

• Let the photographer/videographer know which guest(s) requested to not have his/her image taken.

• Seat attendee(s) out of view.
Working with children

• See IU policies for *Programs Involving Children*:


• For programs that work with children or minors (under age 18), there are three main components:
  • Report suspected abuse or neglect
  • Complete background checks
  • Submit your program information form: protect.iu.edu
Location

- Plan to book Campus Center rooms up to a year in advance:
  http://studentaffairs.iupui.edu/campus-center/reserve-space/

- Cavanaugh Hall room requests:
  https://db.liberalarts.iupui.edu/fms/caslogin.asp

- IUPUI campus rooms are available for events.

Include maps and parking information when corresponding with off-campus guests:
maps.iupui.edu
Special events

• The IUPUI Special Event Advisory Board must be notified of all significant special events (i.e. larger crowds) being held on campus and/or utilizing any university asset or resource. A special event can be defined as requiring the services or facilities of any university department or school. Complete the Special Event Application form at least 4 weeks before event.

• Before signing or purchasing any contractual agreements for sponsorship or membership (which includes table sponsorships for internal events) units must complete the Sponsorship/Membership Data Collection Form and submit it to the Office of Public Affairs and Government Relations 7 days prior to sponsorship/membership deadlines.
IU Office of Conference and Event Registration Services (OCERS)

The IU Office of Conference and Event Registration Services (OCERS) processes the payment and registrations for all on-campus events that require payment/tickets. If your event sells tickets, you MUST use OCERS.

- OCERS provides two levels of registration and revenue collection:
  - full service, $12* per registrant plus 2.5% credit card charges
  - limited service, $6* per registrant plus 2.5% credit card charges
  *2016 rates

- To begin, contact them at: confreg@indiana.edu

- More information: ocers.indiana.edu
Campus food guidelines

• $100 or less of food may be brought in for events from off-campus vendors.

• All other food orders must be catered by IUPUI Food Service. Menu and prices are online at: https://iupui.catertrax.com

• Order food through IUPUI Food Services website, but make contact with a real person, as well. Email: catering@iupui.edu

• Print a copy of your food order for your records and to use as a reference when creating the requisition in KFS.

• Create a requisition in KFS to generate PO.
Paying for what you eat

• Complete hospitality form and have fiscal officer sign.

• The hospitality form must be attached to the requisition before your event.*

• Purchasing will fax PO to vendor (ex. IUPUI Food Service) for payment.

• If expense amount changes, put a note in the requisition document after the event.

*An attendee list is no longer required. The requisition requires an attached hospitality form before it will route for approval.
Honoraria

- Honoraria of $1,000 or less should be paid through a disbursement voucher (DV). Use code E - Compensation for Services.

- Any honorarium over $1,000 requires a Purchase Order.
  - IU Foundation funds can be used to pay for the expense, but expense must first be paid through an IU account and then reimbursed from IUF.

- Payments for services over $5,000 require an agreement signed by Purchasing and a Purchase Order. Contact Purchasing for information on preparing an agreement: purhelp@indiana.edu
Be prepared.

If anything can go wrong, it will.
• Confirm and reconfirm. ASSUME NOTHING!
• Make sure rooms are booked.
• Confirm food order and arrival time.
• Include campus maps/directions in correspondence to guests.
• Communicate location changes to guests in a timely manner.
• Keep contact information and phone with you on event day in case you need a room opened, technical help, or other last-minute requests.
Evaluating your event

• Large, recurring events: ask attendees to fill out an evaluation form to know what changes could be made for the next event.

• Debrief with the planning committee:
  • What worked well?
  • What do we want to change?
    • Keep notes and file for next event of lessons learned, adjustments to be made, successes.
    • Go back to your strategy and evaluate your strengths and weaknesses.
  • Did you achieve your SMART objectives?
Questions
Event Planning

Lauralee Wikkerink, lstel@iupui.edu
February 2017