

EVENT PLANNING HANDBOOK



GRADUATE
STUDENTS'
ASSOCIATION

UNIVERSITY OF CALGARY

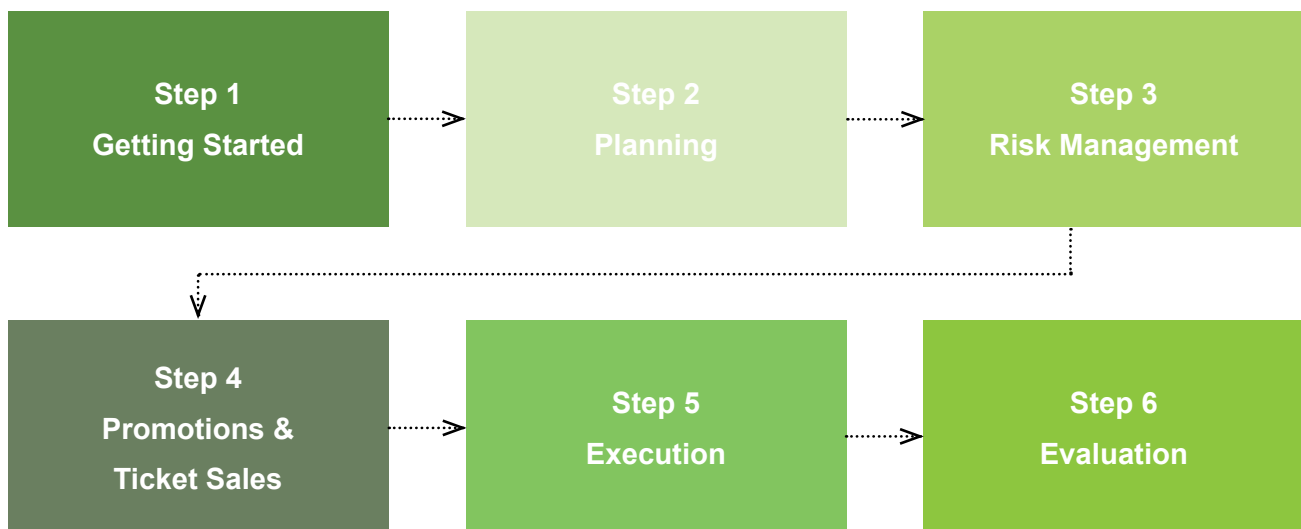
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Welcome to event planning with the Graduate Students' Association (GSA). Planning an event is crucial to Departmental Graduate Associations (DGAs), Graduate Student Groups, and GSA Committees. In this handbook, you will find important instructions, tools, and requirements of the GSA that require your attention when planning events.

All graduate student events are required to complete an [Event Submission Form](#) and receive formal approval from the GSA's Events Coordinator in writing prior to the event taking place in order to be insured under the GSA's general liability insurance coverage. Failure to do so will result in the organizer(s)' personal liability for any property loss or damages to third parties occurred during such event.

GSA Events Coordinator's contact:
Email: events.gsa@ucalgary.ca
Phone: 587.889.1521

Event Planning At A Glance



Definitions

Active Members • all persons registered as graduate students in the Faculty of Graduate Studies or as credit certificate and diploma program students at the University of Calgary who pay full- or part-time Association fees.

GSA-affiliated event • a gathering of Active members and their guests organized by another Active Member or group excluding the Association's staff, Board members, or Committees.

GSA-approved event • an event that has been approved formally by the Association's designated staff with the proper process.

GSA-funded event • an event that is partially or fully funded by the Association and not organized by the Association's staff, Board members, or Committees.

Departmental Graduate Association (DGA) • a graduate student organization composed of Active Members in a Department at UCalgary and officially recognized by the Association.

Event • a gathering of Active Members and their guests organized by the Association's staff, Board members, or Committees for certain purposes including, but not limited to, academic, mental health and wellness, social, sports, competition, and networking purposes.

Event Organizer • the main person who is in charge of an event or is the representative of the event from a DGA/GRN/ student group.

University Events • are those events that are hosted by the University, funded partially or completely by the University and for which a Department Head, Dean, Director, Vice President or other Executive Member have taken responsibility.



General Steps

Step 1: Getting Started

The basics:

- ▶ Determine the goals and objectives for the event(s)
- ▶ Answer the questions “who, what, when, where, why, and how”
- ▶ Research similar events that were hosted in the past to learn best practices; this may also surface partnership opportunities
- ▶ Look for potential partnerships
- ▶ Form a team to help out with event organization
- ▶ Research venues, transportation, entertainment, and food and beverage options

Tips: Collaboration with other student groups is a great way to increase participation and optimize limited resources.

Step 2: Planning

The basics:

- ▶ Seek approval from the GSA Events Coordinator (please complete and submit the Event Submission Form [here](#))
- ▶ Seek approval from your faculty if applicable (only applied to University events – see definition [here](#))
- ▶ Set a date and time
- ▶ Prepare an agenda and roll out schedule for the event – DO NOT FORGET ABOUT SET-UP AND CLEAN UP
- ▶ Draft a budget to include all sources of anticipated revenue (ticket sales, sponsorships etc.) and anticipated expenses (venue charges, transportation, decorations etc.) It is advisable to get quotes from multiple venues that meet the requirements of the event to ensure you are paying a competitive rate. Include in your budget any miscellaneous and unexpected items (e.g. insurance, printing, linen rentals, paper products, parking). Include a 10% contingency fund to cover unanticipated expenses
- ▶ Prepare funding proposal (if necessary)
- ▶ Contact the chosen venue to finalize room set-up, food, décor, and itinerary
- ▶ Sign venue contract (if applicable) and pay upfront costs
- ▶ Recruit volunteers and assign tasks
- ▶ Update the venue on the number of attendees regularly

Tips:

- ▶ When you are given a contract from your chosen venue, read it carefully and ask questions over email so correspondence is documented – keep all emails on file until the event has concluded and all parties are happy as this provides a paper trail if things go wrong
- ▶ Make sure you know:
 - The cancellation policy of the venue;
 - When you have to provide the venue with final numbers of attendees; and
 - When the final food order is due – it is always good to see if you can add to the food order the day of the event in case more people show up than what has been planned; this may happen if you are selling tickets at the door
- ▶ Learn how to plan a green event following the UCalgary's Green Events Guide [here](#)

Forms:

- ▶ Event Planner Template [here](#)

Step 3: Risk Management

The basics:

- ▶ In order to be insured by the GSA, the Event Organizer must obtain formal approval prior to the event taking place
- ▶ **IMPORTANT:** The Association may cover costs through the Association's insurance, excluding costs associated with negligence, which the Event Organizer might become legally obligated to pay as damages to a third party as defined in the Association's Insurance Policy arising from an incident, excluding negligence, that was pre-approved in writing by the GSA for any of the following reasons:
 - Bodily injury; and
 - Property damage
 - NOTE: The GSA's commercial general liability insurance does NOT apply to "bodily injury" to any person practicing, instructing, or participating in any physical training, sport, athletic activity, contest, or exhibition
- ▶ Depending on the size of the event, a Risk Management Plan may be required as directed by the Events Coordinator. If so, the Event Organizer shall draft a risk management plan and risk management strategies and present to the GSA Events Coordinator for approval
- ▶ Depending on the nature of the event the GSA may require the insurance certificate from the venue to name the Graduate Students' Association of the University of Calgary and the University of Calgary's Board of Governors as the additional insured(s) for the specific event

- ▶ Waivers for your events:
 - You must request the GSA's Events Coordinator to provide a waiver which must be filled out by all participants, including the Event Organizer for a GSA-approved event
 - You must follow the guidelines for administering waivers and informed consent from the University of Calgary [here](#)

Notes:

- ▶ In order to be insured by the University of Calgary's general liability policies, a University conference or event must meet certain conditions. Find more information about What Constitutes an UCalgary Event or Conference [here](#)
- ▶ Resources:
 - University of Calgary's general liability insurance coverage [here](#)
 - University of Calgary's Risk Management policies and procedures [here](#)

Tips: Waivers reduce the liability of the Event Organizer and the GSA in case of injuries and/or incidents; however, it does not prevent the claimants from filing a suit against the Event Organizer/affiliated entity.

Form:

- ▶ Please contact the Events Coordinator to obtain an Event Waiver form for your event at least 2 weeks prior to the event taking place
- ▶ [Event Planner Template](#)

Step 4: Promotions & Ticket Sales

The Basics:

- ▶ Have a promotions strategy and plan in mind, and make sure to:
 - Define your target audience
 - Identify key messages
 - Brainstorm ways to reach your audience
- ▶ Some suggested promotional strategies include:
 - Posters
 - An online ticket sale system
 - Emails to members or subscribers
 - Word-of-mouth sales
 - Social media
 - Incentives (such as prizes, or giveaways)

Tips:

- ▶ Dedicate at least 2 to 3 weeks to promotion and advertising for the best results. Depending on the size of the event, you might want to dedicate more than 4 weeks for promotions
- ▶ Submit information about your event to be featured the GSA News and Views newsletter [here](#)
- ▶ Post events on the UCalgary's Events listing [here](#)
- ▶ Use [Canva.com](#) for free online design of your posters or social media graphics.
- ▶ Use [EventBrite.ca](#) for free event ticket sales

Step 5: Execution

The Basics:

- ▶ Check the weather forecast to take actions to minimize any risks
- ▶ Prepare necessary items, equipment for the event in advance of the event if possible
- ▶ Arrive early for set up
- ▶ Walk through the site for potential hazards. Use the Special Events Assessment Checklist from UCalgary's Special Events Policy [here](#)
- ▶ Set up and test equipment
- ▶ Check in and sign waivers
- ▶ Solve any issues or problems that arise
- ▶ Take down and clean up
- ▶ Record feedback and comments from participants

Tips: The most common problem during events is technical issues. Test equipment in advance: ensure that you have internet connection, proper cabling, and sound system for the purpose of the event.

Step 6: Evaluation

Basic steps:

- ▶ The Event Organizer must submit an [After-Action Report](#) to the GSA after each event
 - The data in the After-Action Report will be kept confidential by the Events Coordinator and can only be used by the Association for the Association's Annual Report and potential improvement for future events
 - Failure to submit an After-Action Report might result in rejection of future event submissions from the same group

- ▶ To learn how to make improvements to future events, the Event Organizer can:
 - Conduct a post-event survey
 - In a report, record feedback, finalize costs and revenue
 - Collect recommendations for future events
 - Save all contacts

Tips:

- ▶ The more information gathered from the event, the better. This will help improve future events. For example, keeping track of how much food was consumed and which food was more popular will help plan food orders in the future
- ▶ Use UCalgary's [Office 365's Forms](#) function to create forms/surveys for free

Form:

- ▶ After-Action Report template [here](#)

Special Situations

Alcohol

IMPORTANT: For any GSA, GSA-funded or GSA-affiliated events that include consumption of alcohol that are not hosted in a private residence or a licensee, if hosted:

- ▶ On-campus:
 - All alcohol service on campus, with the exception of events in MacEwan Student Centre, must be arranged and served through the University's preferred food service provider, Aramark. Find more details [here](#)
- ▶ Off-campus:
 - The Event Organizer needs to purchase a Special Events License from the AGLC. Find more details [here](#).
 - Party Alcohol Liability (PAL) insurance is available for purchase for a single or a series of events. The Event Organizer is personally liable for incidents at events where alcohol is provided without PAL insurance. Find more details [here](#).

Field Trips

- ▶ For events with arranged transportation with a bus company, the Event Organizer must ensure that all participants complete a waiver before boarding the bus. The [GSA Procedures and Guidelines for Administration of Waivers](#) must be followed
- ▶ The GSA is not responsible for any carpooling activities. It is recommended that Event Organizer ensure all carpooling drivers are properly insured

Pet Therapy

- ▶ Please follow the Pet Therapy guidelines from the University of Calgary [here](#)

Special Guests, VIP, & Government Officials

- ▶ When there are special guest(s), VIPs, or government officials attending your events, you usually need to indicate this information to the UCalgary's Conference and Events Management Staff in the venue booking form. They will follow up with you for any special requirements.

GSA Funding

- ▶ Funding may be available for DGAs, Graduate Student Groups and GSA committees to apply for. Possible funding includes:
 - Quality Money
 - Event Grant for DGAs
 - Academic Project Support Grant
- ▶ Check out the [DGA Handbook](#) and GSG Handbook for further information relating to funding opportunities.

Sponsorships & Partnerships

- ▶ Sponsorships are important, and can help subsidize the cost for an event. The GSA must be notified of, and approve all potential sponsorship/partnership opportunities or relationships prior to sponsors and/or partners being approached
- ▶ Check out the Guide to Sponsorships from University of Alberta [here](#)

Emergency Response Plan

- ▶ For any on-campus emergency situations, please follow the procedures outlined in the UCalgary's Emergency Response Plan instructions [here](#)

Other Resources

Free Equipment Rental from the GSA

Please fill out the equipment booking form for the GSA's portable speaker and projector. The request for these equipment is included in the [Event Submission Form](#).

Venue Booking

*Please be advised that some conditions are applied to venue bookings on campus. Please coordinate with the venue to learn about these restrictions.

Name of Space	Charges	Booking References
Vitruvian Space	Usually no	ucalgary.ca/fsc/vitruvian/book_space
Class rooms on main campus	Usually no	ucalgary.ca/cem/
Downtown campus	Usually yes	ucalgary.ca/downtown/events-conferences/meeting-rooms-event-spaces
Foothills campus	Usually no	ucalgary.ca/instructionalresources/bookingservices
Green spaces	Unsure	ucalgary.ca/cem/our_spaces/green_spaces
Rozsa Centre	Usually yes	scpa.ucalgary.ca/theatre-services/facilities
The Loft	Usually no	Please contact GSA Events Coordinator for details
Grad Commons	Usually no	Please contact Jaya Dixit, FGS Student Advisor for details grad.advisor@ucalgary.ca
Nickle Galleries	Usually no	Please contact Marla Halsted ,(403) 210-6201, marla.halsted@ucalgary.ca
Community Hub	Usually no	ucalgary.ca/wellnesscentre/node/938
Kinesiology gyms, spaces	Usually yes	Please contact Karen Delaney, Facility Booking Coordinator delaney@ucalgary.ca

Classroom and Green Space Booking

A [Policy](#) for booking classrooms, tables and green spaces for Departmental Graduate Associations (DGAs) and Graduate Student Groups (GSGs) has been established between the Graduate Students' Association and Conference and Event Management (CEM), University of Calgary. This policy grants DGAs and GSGs 2 free classroom rentals and four 4 table booking reservations per calendar month for your meetings and social gatherings.

It is up to the DGAs and GSGs to familiarize themselves with this Policy and other University Policies for CEM and take advantage of the benefits as a student group under the GSA.

The current registered Presidents of each DGA/GSG shall serve as the designated booker for CEM space. If you would like to make a change to your designated booker, please email kmldgre@ucalgary.ca. Only those designated may book space through Conference and Event Management. The designated booker shall act on behalf of their members and it is their responsibility to ensure all club members are aware of the rules and adheres to them whether in attendance at the meeting or event or not.

For general booking information, please visit: ucalgary.ca/riskmgmt/events/booking-information

Conference Centres

- ▶ MacEwan Events and Conference Centre - macewancentre.com
- ▶ UCalgary Conference and Event Management - ucalgary.ca/cem
 - **Tips:** These conference centers are resourceful usually have contacts for any external rental services. You can meet up with their Events Coordinator, discuss your event and your needs, and they will help make your event happen.

Transportation Providers

- ▶ Within Calgary:
 - First Canada Charter (\$209 and up – round trip) - firstcharterbus.com
 - Willco Transportation (\$235 and up – round trip) - willcobus.com
- ▶ Outside of Calgary:
 - First Canada Charter (\$1,100 and up –round trip – school bus) - firstcharterbus.com
 - Willco Transportation (\$1,100 and up – round trip – school bus) - willcobus.com
 - Brewster Canada (\$1,250 – round trip – charter bus with washroom) - brewster.ca
- ▶ Tips: Fill out the request form on these websites and a representative shall follow up on your inquiry.

Equipment Rentals on Campus

- ▶ UCalgary's Com Media Services – Main Campus. Their services include:
 - Classroom equipment booking
 - Conference and event support
 - Technical Services
 - Videoconferencing and Videography.
 - Visit their website [here](#)

- ▶ AV Services - Foothills Hospital Campus. Their services include:
 - AV equipment and technical support to over 100 classrooms and theatres within the UCalgary Foothills Campus
 - Facilitated video conferencing.
 - Technical Support
 - Visit their website [here](#)
 - Call 403.210.3839 for assistance with the operation of audio visual equipment.

Contact the GSA Events Coordinator for any other inquiries, resources, and consultation for your events.

GSA Events Coordinator's contact:

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Phone: 587.889.1521