
EVENT PLANNING GUIDE

7 Steps for a Successful Event



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INTRODUCTION

Planning an event is an exciting process! There are many pieces that go into the planning and developing process that lead to a successful event. This guide will go through many of the steps in coordinating an event for your organization. There are many aspects to consider depending on your event; this guide will go through many of them, though some events may require additional guidance from your Student Activities Advisor! One of the most important notes is to begin your planning as soon in advance as you can! Happy planning!

STEP ONE: GENERATE AN IDEA!

- Before beginning to plan your event and working out the details and logistics, it is important to reflect and consider *why* you want to plan this event and *what* you hope to accomplish.
- Questions you may ask yourself are:

- What is the purpose of this event?
- What are your goals?
- Who is your target population(s) for this event?
- How will this event help you meet your goals and missions?

- Assessing your audience's needs and interests can help guide you and create a sense of direction for your event.
 - Identifying these needs and interests *before* designing your event may increase the likelihood of it being successful and well-attended!

- The last step for generating an idea, but arguably one of the most important, is to determine the date and time of your event along with any other needs for your event.

- Examples of some of these needs are tables, chairs, stage, podium, audio/visual equipment, and lighting.
 - When this is determined it is crucial to begin the room reservation process!
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- Many of the previously mentioned equipment needs are included with your room reservation, but it is still helpful to consider which rooms may best meet your needs.

STEP TWO: RESERVE CAMPUS SPACE & CHOOSE EVENT DATES CAREFULLY

- As mentioned in the previous section, **reserving your event space is a highly critical step before proceeding in the event planning process.** Even if you are not sure about all the logistics of your event, make sure to reserve the room now as it may not be available later.
 - Without this, you may not even have an event or be forced to change the date or location due to rooms potentially not being available!

- **You can always cancel your on-campus room reservation without incurring a charge before the date specified on your reservation quote.**
- **If you are applying for funding from ASUW, GPSS, or the Student Activities Office, a space reservation must be made beforehand.**

- When thinking of a space to hold your event in, you can check space availability through the venue reservation system to see if a certain space is available on a specific date and time.

- **You can find a list of spaces your RSO can reserve at the Student Activities Office [Website](#)! Simply head to the “SAO FAQs” section and click on the “Where can RSOs reserve event/meeting space on campus?” subsection.**

- Along with the location of your event, another thing to consider in more depth is the date and time of your event. There may be times when the University or other groups host major events. This may lead to less spaces being available or even less attendance for your event.
 - **The Student Activities Office recommends checking the [RSO Directory Calendar](#), the [HUB Calendars](#), and the [University Calendar](#) for any potential conflicts.**

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- The final step in this section is to finalize your equipment needs. As mentioned in the previous section, there is certain equipment that may be needed for your event and now you can finalize all your equipment needs.
 - As mentioned, your space reservations often cover most of these needs, though additional needs may be provided by the [Student Technology Loan Program](#) and the [RSO Resource Center](#).
 - If you are not sure which space may meet your event's needs, you can always meet with your Student Activities Advisor for advice, suggestions, and facility contact information.

STEP THREE: CRAFT THE EVENT!

- Now that you have determined your event's goals and purpose along with the date, time, and location, you can proceed to flesh out the details for your event!
 - It may be helpful to begin with a brainstorm of ideas for the event format, structure, and out outline.
 - As this is just the brainstorming phase, it is helpful to keep comments on ideas to a minimum and instead contribute to ideas and build off of them or contribute other new ideas.
 - When done brainstorming, the next step is to go through your list of brainstorm ideas and determine what is feasible and will help in meeting your goals.
 - As you are developing your ideas, this may be an appropriate time to come up with an event name. This can be something catchy or straight to the point, relating to the event.
 - You can also start determining what else you will need for the event. Depending on your event, these can be things like guest speakers or musical acts, parking and transportation, or general event supplies - things like pens, scissors, etc. can often be overlooked, but can make a huge difference in the event functions.
 - It may also be helpful to think about how you will assess and evaluate your event. What are some signs that the event is successful? How will you determine areas for growth?
 - There are also several other potential factors to take into consideration:
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- University Use of Facilities Request (UUF): Will there be non-university participants in attendance? Are you reserving an outdoor space? Will there be outdoor amplified sound? Is the event political in nature? If you answered yes to any of these questions, you will need to submit a UUF. Meet with your Student Activities Advisor to go over UUF guidelines and form submission.
 - Fundraising Form: If your event is a fundraiser, contact your Student Activities Advisor to go over fundraising guidelines and form submission.
 - Temporary Food Service Permit: If you are serving food on campus (e.g. food that is cooked, prepped, chilled, warmed, etc.) you may need a temporary food permit through UW Environmental Health and Safety.
 - Security: If your event will have 300 or more people, you may need to have security present. UWPD can also determine any needs for security staffing. Contact your Student Activities Advisor to help arrange for security or police staffing.
 - Parking: If you anticipate that you will need to reserve parking for your event, you can coordinate with Transportation Services to order special parking lots, parking passes, and event signage.
 - Special Guests, Speakers, or Performers: Contact your Student Activities Advisor to go over details and contracting. Policies do apply for special guests so your Student Activities Advisor *must* be a part of the process. You can also apply for some forms of funding to pay for your special guest!
- Be sure to finalize event details at the very least one week before your event to make sure everything is ready!

STEP FOUR: CONSIDER THE BUDGET

- Considering all the factors that will be going into your event, what is the anticipated cost?

- **When determining costs, be sure to include taxes and fees into your budget, wherever applicable. Sales tax in Seattle is currently 10.1% (2019); be sure to note differences in city and year when planning.**

- **Make sure to get quotes for each event piece you may need in order to get the most accurate budget possible.**
- There are several funding resources on campus, including grants from ASUW, GPSS, and the Student Activities Office. Funds include:
 - **The HUB RSO Fund**: Funding from this resource can only be applied toward room reservations in the HUB.
 - **The Wells Fargo Fund for RSOs & The UW Alumni Association Fund**: Funding from these resources can be applied to equipment, rentals, and other event needs (e.g. stages, speakers, special guests, single-use supplies (e.g. napkins, utensils, etc.), etc.)
 - **The HUB RSO Travel Grant**: Funding from this resource can go toward travel costs for RSO events. **This is a reimbursement system where the RSO must first pay for the costs and later submit receipts for reimbursement.**
- Another resource available to RSOs is the UW crowdfunding page, *Together UW*. This page allows RSOs to create pages to receive crowdfunding donations. Pages must be specific with details and **should be planned at least a quarter in advance, with the actual page running for about 45 days.**

● **All funding requests should be submitted at least 3 weeks before the event. Funding is on a first-come-first-serve basis beginning in Fall and often runs out quickly.**

- Remember to be aware of your resources to potentially cut down on costs. The *Student Activities Office*, *RSO Resource Center*, and *HUB Event Services* can be helpful to your event.

STEP FIVE: ADVERTISE YOUR EVENT - FOR FREE!

- There are several ways to advertise your RSO's event at no cost! Some examples are the *RSO Directory Events page*, the *HUB Calendars*, the *SAO Newsletter*, *hanging a banner on Kane Hall*, or getting a shout out in the *Daily's RSO Update*.
 - Certain policies and limitations may apply with each resource.
- You can also use social media or the free copy options for RSO posters and flyers from the *RSO Resource Center*!

STEP SIX: EVENT TIME!

- Now that the day of the event has arrived, it is time to execute the event. Be sure to do walkthroughs of the event to make sure everything is running as it should.
- There may be times when things may happen that alter your plans. Be flexible and work to find a solution to allow the rest of the event to run smoothly.

◦ *Realistically, unforeseen situations may happen that you have no control over. Try not to stress about these as this stress may impact other parts of the event. Instead, make any necessary changes to adapt and allow the event to continue smoothly.*

- Be sure to participate in your event and have fun!

STEP SEVEN: EVALUATE AND ASSESS

- Even though the event may be over, it is helpful to perform the post-event step of evaluating and assessing the event.
 - Evaluating and assessing may help you to reflect and celebrate your successes while also informing areas for potential changes and improvements for future events.
 - It is possible that you may want to repeat this event in the future and this reflection can help you determine how to improve for the future.
 - Things to consider in your assessment may include items like date, time, and location; individual cost of items and total cost; even attendance; duties and roles (who did what).
 - This can help you determine if these items can remain the same for future events or if some changes should be made. It can also help future RSO leaders in their event planning efforts.
 - This will also allow you to reflect on yourself and the things that *you* learned about yourself as an event planner and leader throughout the process.
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A NOTE ON INCLUSION AND DIVERSITY

- The way a room is organized and set up can have an impact on how well attendees can navigate the event. Individuals in wheelchairs may require additional spacing in aisles and reserved spaces to be able to properly participate in events and view performers or speakers. Along with this, be sure to structure events and activities in a way that everyone can participate.
 - If there is a speaker, it may also be helpful to consider the multiple ways in which information can be delivered, such as videos, audio, printed materials, etc.
 - It may also be beneficial to have some of your event planning team have knowledge on how to support individuals with disabilities.
 - When using screens for presentations or videos, make sure that the contrast and lighting allow for easy viewing. Also consider using subtitles that can easily be read throughout the room.
 - Be mindful of your language. For example, when addressing groups of people, rather than saying “you guys,” try saying something like “you all” instead. Changes in language may seem small, but make a large difference in promoting inclusion.
 - Disability statements: the University is required to announce equal opportunity and information on reasonable accommodation policies on all publications and notices. This includes advertisements and announcements of events that are open to the public, employee and students. This disability statement can come in two forms:
 - For events open to the public, employees, or students:
 - “The University of Washington is committed to providing access, equal opportunity and reasonable accommodation in its services, programs, activities, education and employment for individuals with disabilities. To request disability accommodation contact the Disability Services Office at least ten days in advance at: 206.543.6450/V, 206.543.6452/TTY, 206.685.7264 (FAX), or e-mail at dso@u.washington.edu”
 - For invitations or announcements to a limited group (known invitees):
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- “To request disability accommodation, contact the Disability Services Office at least ten days in advance at: 206.543.6450/V, 206.543.6452/TTY, 206.685.7264 (FAX), or dso@uw.edu”
 - For additional guidance and information on equal access for events, visit the [UW DO-IT Equal Access page](#) or the [D Center](#).