

EVENT PLANNING GUIDE COST WORKSHEET

Event Event Date

Event Planner Phone #

Budget Officer

Cost Center

- Who is the event for? Check all that apply.
- Employees
 Students
 Public
 Other
- There will be gifts, prizes, or awards
 Resources will be needed (marketing, IT, security, custodial, etc.)

Date	Item Description	Estimated Costs	Actual Costs
TOTAL:		<input style="width: 80px; height: 25px;" type="text"/>	<input style="width: 80px; height: 25px;" type="text"/>

Purpose of Event (Include relationship to CWI Mission, Vision & Core Themes if applicable):

Description of Activities (external vendors, activities, presentations, etc.):

Are there any known risks with any of the activities or events? If yes, explain below.

I understand that I am responsible for the planning, management, and execution of this event.

Event Planner: Date

Budget Officer/Dean to \$1,999: Date

EOT over \$2,000 to \$4,999: Date

VP, VP Finance, EVP up to \$99,999
(Over \$10,000 Requires President): Date

After the form is completed, please email a copy to the Event Planner along with a copy to Scheduling at scheduling@cw.edu

WHAT YOU NEED TO CONSIDER (not all inclusive):

- Please allow sufficient time for departments to process, plan and/or troubleshoot your requests (for safety, grounds, availability, staffing, etc.).
- Events Planning Committee will guide you in this at the initial meeting.

Facilities

- Tables (6' or 8')
- Chairs
- Trash Bins (sm, lg)
- Canopies
- Signage
- Rental Equipment*
- Electrical Needs
- Traffic flow/markers
- Security* (required)
- Custodial* (may be required)
- Maps of Event
- Safety Plan (see below)
- Emergency Plan (see below)

Business Office

- Budget Approval
**Refer to Business Office guidelines for more information*
- [Purchase Orders](#) (>\$1999)
- [Payment Requests](#)
- Contracts (see below)
- Cash Handling
 - [Deposit Form](#)
- Raffle Instructions

Technology

- IT (computers, personnel, projectors, etc.)
- AV (microphones, sound, video)
- Rental Equipment*

General

- Dedicated Event Manger

Marketing

- Canopies
- Swag*
- Banners*
- Advertising*
- Publicity*
 - Social Media
 - Bert's Alerts
 - Student Newsletter
- Announcements*
- Invitations*

**Additional charges may apply*

ADDITIONAL NEEDS:

Outside Services, Activities and/or Vendors (see attached Event Insurance Requirements)

- Proof of Insurance (need insurance for event? See [TULIP Insurance](#))
- Proof of Licensure
- Participation/Registration fees (booth, car, etc.)?
- Contracts/waivers indemnifying CWI required? (must go to Business Office for review & signatures)
- Vendor and/or performer agreements/fees?

Safety (see attached Safety & Emergency Guidelines for all events)

- Safety requirements addressed as noted in safety guidelines
- No** Walkways/driveways/exits may be blocked (emergency compliance required)
- Emergency guidelines reviewed and plan created
- Communication plan (everyone working the event knows their job, who is doing what, safety plan, etc.)
- Create plan for inclement weather (outdoors events)

RESPONSIBILITIES FOR REQUESTOR PLANNING

This guide is to help navigate event safety needs through the planning process.

Please allow sufficient time for Facilities to help trouble shoot any ideas that may fall outside of noted guidelines below.

- Designate a manager to be involved in planning & present for the entire event (*set up through breakdown*) to:
 - Be the single point of (*primary*) contact for all issues (*safety and otherwise*) that arise at the event.
 - Work with Security should passageways or fire lanes become blocked/congested.
 - Handle local emergency agencies should the need arise. Security will be available to assist.
- Address safety concerns (*see below*) that arise throughout planning process.
- Organize workers/volunteers giving them each specific jobs to specific time frames.
- Create a communication plan and phone contact list that all workers know.
- Create set up schedule/map (*see below*) that all entities setting up for event know in a timely manner.
- Create plan for inclement weather (*outdoor events*)
 - Move event? Change in activities? Cancel? Who makes the call? Who contacts all involved?
 - Know obligations noted in signed contracts (*cancellation fees, etc.*).
- Create an emergency plan for the event (*see below*) and brief all participants.

GUIDELINES FOR PRE-EVENT & DAY-OF REQUIREMENTS

Safety Planning

- Walks through the venue are highly encouraged toward the beginning of planning, during planning and days before the event.
- Exit & entrance pathways (*including emergency exit doors not routinely used*), hallways, corridors, sidewalks, driveways **CANNOT BE BLOCKED at any time** (*an exception can be proposed to Facilities for review well in advance*).
- Traffic flow plan (*pedestrian and vehicular*) defined with Security input (*inside and outside*).
- Electrical needs may require specific placement of activities due to circuit capacities and tripping concerns. (*Equipment must be in proper working order*).
- Ensure that canopies and other large objects are secured with weights only (*sufficient wt. required*) during outside events.
- Appropriate location and items needed for activities involving scientific demonstrations, etc. that will use chemicals, heating elements/open flames (*including BBQs*), machinery, etc.
 - Define appropriate storage for flammables/fire extinguishers, personal protective equip., etc. during event.
- Create set up schedule (*stagger vendor arrival when needed*) and accurate, detailed map with enough staff/volunteers available to assist in guiding people to appropriate places the day of the event.
 - All transport of items from parking lot must be completed 45 minutes **prior** to event start time (*inside & outside*).
 - Vehicles of all kinds must be removed from event area.
- Breakdown must wait until the event is closed/ended.

Emergency Planning

- Be familiar with [CWI Emergency handbook](#) & know Security # 208-562-3333.
- Create emergency plan and provide orientation to all CWI employees, volunteers and vendors working the event that includes:
 - Nearest exits (*and safe assembly areas outdoors*).
 - Evacuation of a localized area is required even if a small fire, etc. doesn't require full evacuation.
 - Assembly areas cannot be in hallways, roadways, or fire lanes, etc.
 - All people must remain in evacuation areas until clearance is given.
 - Identify where fire extinguishers, etc. are located.

GENERAL INSURANCE REQUIREMENTS

- **All outside service providers and vendors are required to provide a Certificate of Liability Insurance coverage. This is also true for external co-sponsors of CWI events.**
- **Minimum Requirements:**
 - \$1 million per claim/\$2 million aggregate
 - Name CWI as an Additional Insured
 - Utilize link to [TULIP Insurance](#), if they do not have their own.
- **Additional requirements as needed or as type of business of activity:**
 - Worker's Compensation, if they have employees
 - Sales License, if selling
 - Food Handler's License (*for food providers*).
 - Idaho Health Certificate (*for food providers*).
 - Waivers indemnifying CWI.
- **Entertainment/Performer Requirements:**
 - Vendor/Performer Agreements/Contracts will contain:
 - Indemnification agreements, including insurance and licensing requirements

CWI Scheduling Dept. has *designed* this Worksheet - any questions about the worksheet design, please email to: scheduling@cw.edu. If you have questions about the event *itself*, please contact the Event Planner of the specific event.