

Columbia University  
Department of Public Safety

“Pride-Professionalism-Service”

## Criteria for Successful Event Planning

### I. INTRODUCTION:

The success of any event, regardless of its size, depends upon the effectiveness of the planning process. There are many details which are critical to the event planning process which can sometimes be overlooked by those who do not engage in event planning on a regular basis. Therefore, the items set forth below are intended to serve as a checklist of criteria which should be considered when planning events, both large and small, on the Columbia Campus:

### II. GENERAL PLANNING CRITERIA:

The following items should be determined as early as possible in the planning process as they will generally impact on the design of the event plan:

#### Nature of the Event

- Describe the specific type of event being planned (i.e., lecture, panel discussion, performance, etc.). This should include the basic format of the event and should suggest appropriate venue options.

#### Sponsoring CU Group

- Ascertain the **advisors** and/or group contact information. If the event is being sponsored by an **authorized** student group, the Student Life group advisor (for undergraduate groups) or the Faculty advisor (for graduate student sponsored events) should be part of the process, including approval of the event. For events where there are multiple sponsoring groups or organizations, some group should be designated as the primary sponsor of the event and a primary contact for the group should be identified.
- The primary sponsor/contact will collaborate with University partners in the planning and execution of the event. The primary sponsor cannot abdicate decision-making responsibilities to co-sponsors.

### **Co-sponsoring Groups**

- Ascertain the identity of co-sponsoring groups (affiliated and non-affiliated) assisting in the production of the event.
- Control of the event and decision making must remain with the primary CU sponsor, unless the event is entirely a non-affiliated rental.
- While co-sponsoring groups may weigh in on certain issues, they cannot dictate the terms of the event. This is particularly important when there are non-affiliated groups taking part in and/or supporting the event.

### **Basic Logistics of the Event**

- Ascertain the date, time and requested venue for the event (Is the requested venue appropriate for the event?).

### **Guest Speaker(s) and Performers**

- Determine the level of fame, notoriety or controversy associated with the speaker(s) and/or performer(s).
- The level of support needed at an event is not content neutral. Certain events need more support than others. The mere presence of a guest speaker and/or the topic on which they will speak may present challenges that require increased levels of support.
- There is a variety of ancillary issues associated with speakers that can impact upon the support needed for an event (i.e., whether the speaker provides his/her own security or their protection is assumed by municipal law enforcement).

### **VIP Attendees**

- The nature and scope of VIPs can dramatically alter the level of support required at an event and oftentimes presents challenges beyond the main focus of the event.

### **Expected Level of Interest in Event**

- The greater the interest in an event, the more likely increased levels of support will be needed. This could result from the number of people interested in attending the event,

especially as it relates to venue capacity. Additional support may also be required due to the sensitive or high profile nature of an event's guest speaker(s) /performer(s) or content.

#### **Audience Size and Make-Up**

- The number of people attending an event has a direct impact on the level of support required. The make-up of an audience also impacts the type of support required. For example, the University has judicial review over students attending CUID holder only events. On the other hand, the University does not have judicial review over attendees at events open to the public unless that attendee is affiliated with the University. It is for this reason that the nature of the event is so important in determining the nature of the audience, e.g., should the event be open to the public?

#### **Will the Media be Invited and/or Have Access to the Event?**

- The presence of media, CU affiliated or external to the University, can have an impact on planning for an event. The sponsoring group must first decide whether they wish media to be present at their event. If they do, the sponsoring group must determine whether it will proactively invite the media to the event. When the event is open to the media, adequate staffing from the sponsoring group, as well as a plan to address media issues such as; level of access, designated media location, and participation in Q and A portions of the event is required. **If media is not desired at an event, the event should not be open to the public because the media will have the same access as any other member of the public at such events.**

#### **Will the Event be Recorded by Affiliates and/or Non-Affiliates?**

- Video and audio taping of events can also impact on the planning process. Taping implicates additional planning logistics, including decisions on whether there will be like fixed or roving audio and video positions, focus and purpose of the taping and rules for pre and post event interviews.

#### **Event Budget and Sponsors' Ability to Pay for Necessary Support**

- Depending on the scope and magnitude of the event, levels of support (and the associated costs) can fluctuate greatly. A critical part of the planning process is to interact with all support groups to help towards informed decision-making by the sponsoring group(s) in determining their financial ability to host the event.

### **Event Staffing Plan of Sponsoring Group(s)**

- While the various support groups will determine their staffing requirements based on the details of the event, the sponsoring group must also develop a staffing plan sufficient to meet their responsibilities at any event they are hosting.

### **Will Additional Administrative Support Staff be Required?**

- Large scale, high profile and/or sensitive events may require assistance from administrative support units at levels that exceed what is normally allocated to support an event (i.e., the prudent assignment of University Delegates and additional Student Life or Departmental Advising staff).

### **III. SECURITY AND SAFETY CONSIDERATIONS:**

The following items also need to be considered in the context of the planning process once the general criteria for the event have been determined:

- **Is the venue suitable for the event?** There are several factors that go into determining whether an event can or should be held in a venue.
  - The scope and nature of the event, the sensitivity of the topic, the potential interest and audience size and the status of the guest speakers, performers or audience members are factors that should be considered in making this assessment.
- **Potential for counter programming by other groups** :There may be events on campus in which the topics being discussed and/or speakers and attendees energize other groups to engage in counter programming or protests. The counter programming/protests can be sanctioned or unsanctioned. Such potential needs to be recognized and addressed in planning for the event.
- **Access and crowd control** : The details of the event will dictate what access control devices/policies (i.e., stanchions, barriers, frozen areas, other restrictive policies, etc.) are necessary to help ensure a safe and problem free event. These access controls may be in place both inside the room and areas surrounding the venue. Proper access and crowd control are critical to the safety of every event, regardless of its nature.

- **Will bags, cameras, posters, etc. be allowed into the venue?** Depending on the nature or content of the event, certain items may present security challenges (increase the risk of disruption or disturbance inside the room) if allowed inside a venue.
- **Is there a need for a Green Room or Holding Room?** Given the fame or notoriety of the guest speaker(s)/performer(s), VIPs in attendance and/or the sensitive nature of certain events, there may be need for one or more Green Rooms or holding areas. These rooms and areas must be proximate to the event room. They should afford safe access to and egress from the room that is separate from the audience entrance, in the event of an emergency or potential threat to the performer/speaker. This is a critical factor in determining the suitability of a venue. An otherwise suitable venue may be rendered unsuitable if a required holding area is not available at the location.
- **Is there a need for separate entrance and egress for guest speakers and/or VIP attendees?** Similar to the potential need for a Green Room or holding area, another important consideration in determining the suitability of a venue is whether there is a suitable alternative for ingress/egress for high profile participants and attendees other than the entrance and egress designated for general attendees.
- **Credentials** : Credentials are important tools for ensuring appropriate access to secure areas by authorized persons while restricting those who are unauthorized. They enhance efficiency significantly by rendering event organizers and staff persons easily distinguishable from event attendees. For high profile and sensitive events, where access to certain areas will be limited to those who absolutely require it, the use of credentials is essential for a successful event. The credentials for these types of events will be produced and distributed by Public Safety. The numbers of credentials issued and the different types required for different access levels is an important part of the planning process. Also, there will always be an emphasis on limiting the number of access credentials to as few persons as possible.
- **Limits on non-affiliate access to a venue (Where are they allowed to be?):** Some events on campus, depending upon their nature, may be open to the general public. Events may or may not have entry fees. In either the case, venue access for non-affiliates is often limited to the appropriate portion of an otherwise secure building. For example, Lerner Auditorium. Considerable effort is put into access control at Lerner to make the building safe and secure for those who have legitimate access to it. If an event in the auditorium is open to the public, non-affiliate access to the building should be limited to the auditorium proper where the event is taking place. This is an important consideration in determining the level support required at an event and is a critical component of the planning process.

- **Events Involving Alcohol:** There are two types of ‘alcohol involved’ scenarios at events that must be addressed during event planning. Either scenario can impact significantly on planning/staffing requirements.
  - The first is for events at which consumption of alcohol is the stated desire of the sponsoring group(s). Sanctioned alcohol availability at events often increases the number of support staff required. While this is particularly true at events which include persons who are under the legal drinking age, there are established University policies related to alcohol that must be considered during the planning process for all events on campus where alcohol is available.
  - The second scenario involving alcohol and event planning is those events that may encourage pre-event alcohol consumption or attempts to bring unauthorized alcohol into an event (i.e., concerts, talent shows, class dinners, club dances, etc.).
  
- **Pre and post event receptions, meetings, book signings, etc.:** Many events often have component events, either before or after the main event, that require additional support. It is important to the overall success of an event, that all facets be planned for and staffed appropriately.
  
- **Ticketed Events and pre- registration lists and other forms of audience access control :** Depending upon the nature of an event, its efficiency and safety can be enhanced by using a process for determining in advance who will be in attendance. In particular, it is often advisable to use a pre registration/ ticketing system for those events that may become oversubscribed or are otherwise restricted, including those events that are limited to Columbia affiliates for one reason or another. This can eliminate chaos during the admission process by identifying ahead of time who is entitled to enter the event.
  
- **Guest Lists :** At many events, sponsoring groups or the speakers/performers may wish to invite non-affiliated guests. These guests should also be pre- identified and recorded on a guest list, in accordance with current University guest policy which speaks of limits on the number of guests that can be invited. This is true of events, regardless of the audience make-up, but is especially true of sensitive and high profile events that will include non-affiliates.
  
- **Advertisement and promotion of the event – both on and off campus :** The nature of and level of interest generated for an event can change dramatically depending on the methods used to advertise or promote it. It is important that the sponsoring CU group maintain control over the event promotion and not allow outside groups or guests to advertise an event in ways inconsistent with what was agreed upon during the planning process. The availability of internet as a promotional tool makes it critically important that the framework

for promotion agreed upon during the planning process be strictly observed. Invited speakers/performers who attempt to self-promote their scheduled appearances on campus, in violation of what has been agreed to in the planning process, can dramatically alter the nature of an event to the extent that it may become untenable. Once the information has been released on the internet, its impact cannot be undone.

#### **IV. CONCLUSION:**

This checklist is not intended to be all-inclusive. It is intended to provide a framework for the many discussions that are necessary to plan and execute events safely and successfully. In the end, communication, cooperation and mutual support are the key ingredients to successful event management. This guide, if used properly, is a good first step!

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