EVENT PLANNING 101

GUIDELINES FOR GRADUATE STUDENT ORGANIZATIONS
Limitations to note

• Maximum amount each organization is eligible to request from the GSG in an academic year = $3000

• Food limitations:
  • One off-campus event with food per semester
  • Amount may not exceed $20/person or $600 total (for off-campus events)

❖ Please refer to the GSG website for a complete description of their funding guidelines (www.neu.edu/gsg/)
  ❖ The funding application can be found of OrgSync here: https://orgsync.com/29643/forms/60862.
Event Planning: Initial Steps

• Meet with your Center for Student Involvement Program Manager
  • All graduate organizations work with Steph Pierce (s.pierce@neu.edu; 617-373-2642)
  • She will want to learn all about your vision for your event, and will work with you to determine a way for your event to occur within the funding limitations and Northeastern policies in place

• General Rules of Thumb:
  • Events with no contracts can be planned with about one month’s lead time (with approval from your Program Manager).
  • Events that require contracts can take up to 8 weeks to execute, so the funding application should be submitted well in advance of the event date (to allow time for GSG review and contract negotiation).
Event Planning: The Details

• Some of the following items may be applicable for the event you have in mind:

  • **Space Requests**: Most events will need a room and/or table to host them. If you have a particular space in mind, talk to your Program Manager so they can guide you through the process of requesting that space.

  • **Contracts**: To begin the contract process, you must fill out the appropriate Pre-Contract Form in OrgSync.
    
    - **Zero-Based**: This contract is used whenever you have a member from outside the Northeastern community participating in your event (i.e. as a guest speaker), but they are not being paid for their services. The lead time to complete this contract is about 1 week. *(Complete the Performer/Service Provider Pre-Contract)*
    
    - **Facility**: This contract is used whenever you are contracting with a venue to host your event off campus. The lead time to complete this contract is at least 8 weeks.
    
    - **Performer/Service Provider**: This contract is used whenever you are contracting with an individual, or vendor, who will provide services to your organization. The lead time to complete this contract is at least 6 weeks.
Event Planning: The Details (cont.)

• Some of the following items may be applicable for the event you have in mind:
  • **Ticketing**: Some events may require the use of the Box Office and the ticketing system (i.e. events held in major event venues, such as Blackman Auditorium). Talk to your Program Manager about what is appropriate for your event.
  • **Event Management Staffing Charges**: If you will be holding an event in a major event venue, you will likely need Event Managers to assist with your event. These costs can range from <$100 to upwards of $1000, so talk to your Program Manager about what may be required for your event.
  • **NUPD**: Some events will require a NUPD detail(s). Talk to your Program Manager to see if it will be needed for your event.
  • **Catering**: You may want food at your event. Needs can vary widely, so discuss your plans with your Program Manager to see what policies are applicable for your event.
    • On-campus vendors: No contract/insurance required (faster turnaround)
    • Off-campus vendors: Contract/insurance is likely required (depends on the size of your event). May require 6+ weeks lead time prior to your event.
Event Planning: The Details (cont.)

- There are other components that may be applicable for your event. Please refer to the Student Organization Resource Guide for further information.
  - An electronic version of this document can be found here:
    - http://neu.orgsync.com/policies

- Whenever you are unsure about an event planning detail, please reach out to your Program Manager for advice and guidance. They work with many student organizations throughout the event planning process, and as such, are an excellent resource for any confusing components of event planning at Northeastern.
GSG Funding Application (Part 1)

- Once you have worked with your Program Manager to craft a plan and determine all costs associated with your event, you are then ready to compile the GSG Funding Application.
- Be as specific as possible when compiling and writing your application. The GSG will want to know why you need $XX amount of funds, how the funds will be spent, etc, so the more detail that is included, the stronger your application will be.
- If possible, include quotes/invoices to support your reasoning behind the need for a specific amount of funding.
GSG Funding Application (Part 2)

• Please note that the GSG is responsible for allocating the funds generated by the Graduate Activity Fee. When determining how to best allocate these funds, they look for the following:
  • Does this event enhance Northeastern graduate student life by bringing together members of the NU graduate student community?
  • Does this event correlate to the mission of the organization proposing the event?
  • Does this event enhance the academic environment and/or provide professional development opportunities for Northeastern graduate students?
The GSG Funding Application is now available electronically via OrgSync. The form can be accessed here: https://orgsync.com/29643/forms/60862.

Please note that the GSG is comprised of graduate students (just like you), so it may take a week or so to hear back regarding the status of your request. If you have not heard back after one week, feel free to send a follow-up email requesting an update about the status of your application (gsg@neu.edu).
Fundraising

- Sometimes the scope of your event may be greater than what the GSG is able to financially support. In these cases, you may need to fundraise to support your event planning needs and efforts.

- All fundraisers must be pre-approved by the Center for Student Involvement before they are permitted to occur. Guidelines regarding fundraising can be found in the Student Organization Resource Guide. Once your organization has reviewed these policies, you are then ready to submit the Fundraising request form, which can be found on OrgSync here: https://orgsync.com/22998/forms/21201.

- This form will be reviewed by your Program Manager. If approved, you will receive a confirmation email with instructions about how to go about successfully executing your fundraiser.
Receiving Your Funding

• If the GSG approves your application, the next step in the process is transferring the funds into your organization’s budget account.
  • Please note that this account is separate from your organization’s cash account, and the funds do not roll over from year to year. So if your organization does not utilize all the funds awarded for the event, the remaining amount will return back to the GSG’s account.

• The VP of Finance will submit appropriate paperwork to the GSG advisor for review. Once approved by the advisor, SABO will be notified to execute the transfer.
  • As you can tell, there is room for delay in the process, which is why it is suggested that your organization submit their funding application well in advance of when the funding would need to be accessed.
Reimbursement

- It may be easier to purchase items for your event on your own, and then proceed through the reimbursement process.
  - Please note that the GSG must have already approved your funding application prior to your event/reimbursement – they will not approve funding for events/expenditures that have already occurred, in which the group decides after the fact to try to obtain funding from the GSG to support it.
- Reimbursement paperwork can be picked up in SABO (in 434 CSC J). When you submit the paperwork, you will need to include all itemized receipts (credit card slips are not sufficient).
- Note: You will NOT be reimbursed for sales tax. To avoid issues, please provide the University’s tax exempt certificate to the vendor at the time of sale (an electronic copy of this document can be found here: [http://www.northeastern.edu/ap/pdfs/Massachusetts_ST-5_T.pdf](http://www.northeastern.edu/ap/pdfs/Massachusetts_ST-5_T.pdf)).
  - An exception to this rule is the tax at a restaurant – SABO WILL reimburse for this because restaurants do not always accept the University’s tax exempt certificate.
Don’t be overwhelmed!

• We know this can be overwhelming if you have never gone through the event planning process at Northeastern. Please know that there are resources out there to assist you with this process!

• Don’t hesitate to reach out to your Program Manager from the Center for Student Involvement, Steph Pierce. She can be reached at:
  • s.pierce@neu.edu
  • 617-373-2642

• GOOD LUCK!