
UPEI Event Management Procedures

A resource for stakeholders

Dated: April 11, 2019

UPEI Event Management Procedures

Approved by Vice President, Administration & Finance

Approved on April 11, 2019

OVERVIEW

The following procedures are authorized by the Office of Ceremonies and Events (“Office”) and contain the process and/or set of steps necessary to give effect to the Event Management Policy (“Policy”). This document will serve as an aid in having events approved.

These procedures assist UPEI with:

- Outlining the process in which events are approved, as outlined in the Policy.

SCOPE

Compliance with these University procedures extends to events sanctioned by the University or held at the University facilities and applies to all University departments and units, staff, faculty, students, visitors, and other stakeholders.

**If this is a Non-University Event being planned by external parties renting campus facilities, please reach out to Conference Services (902-566-0952), or Athletics and Recreation for use of the Chi-Wan Young Sports Centre and outdoor sports fields and facilities (902-566-0305), for rates and to book the space.*

PURPOSE

The Purpose of this document is to ensure:

- **Communication.** Ensuring that key stakeholders and departments on campus are aware when events are taking place.
- **Planning.** Planning is key to managing successful events.
- **Legality.** Ensuring that contracts and insurance are in place before executing an event, when necessary.

RESPONSIBILITIES

Planning an event on campus can be an involved process. Please review the requirements contained herein and contact the Office of Ceremonies and Events [events@upei.ca or 902-566-0974] for an initial consultation and with any questions.

It is the responsibility of the Office to approve events. Various financial, insurance, liability, public safety, and other risk management issues for the University may need to be reviewed.

As per the Policy, all University Community Members **must** consult with the Office and have the event approved before continuing the planning process of any event, with the exception of Conference Services and Athletics and Recreation (see 3b below).

DEFINITIONS

UPEI Event Unit: The UPEI Event Unit is the academic faculty, school, department, and/or institute; administrative office or non-academic department within and operating on behalf of the University; or registered and approved student group within the UPEI Student Union, or the UPEI Student Union that endorses and/or owns the University Event. The UPEI Event Unit may consist of several of these University areas (i.e. pan-campus events such as UPEI Mental Health Week).

Event Lead: is the assigned University employee who is responsible and accountable for the execution of the event.

A Event Lead **IS** someone who is:

- From an academic faculty, school, department, and/or institute
- From an administrative office or non-academic department within and operating on behalf of the University
- From a registered and approved student group within the UPEI Student Union, or the UPEI Student Union

A Event Lead is **NOT**:

- Any individual member of the UPEI faculty, staff, or student body providing their name to a group simply so that they can plan an event using campus facilities
- Any individual who does not currently work or attend UPEI

- Any non-profit or corporate entity that is not affiliated with UPEI and does not otherwise have an approved University event unit (and, therefore, must book through Conference Services or Athletics and Recreation)

UPEI Event Approval Form: The Event Approval Form is the document that the Event Lead must submit to the Office of Ceremonies and Events *prior* to booking space, promoting event, or entering into any internal or external agreements or contracts.

PROCEDURES

General

Before the Office of Ceremonies and Events can confirm whether an event can be held on the University campus, it is necessary that the UPEI Event Unit appropriately identify a Event Lead and submit an Event Approval Form.

1. Event Requirements

All University Events must meet the following requirements:

- The event must have an Event Lead.
- The event must be approved by the Event Lead's Chair/Dean/Director. They must be given the opportunity to review the Event Approval Form, understand the commitment of staff resources, consider the community impact if holding the event on campus, and identify, if necessary, any conflicts of interest that might preclude the event from being held on campus.
- The purpose and content of the event must be relative and consistent with the vision, mission, and values of the University and align with the strategic goals of the Event Unit.
- The budget authority for the Event Unit must be informed of the event and approve the proposed expenditure of funds prior to the Event Approval Form being submitted.
- The Event Approval Form must be submitted to and then approved by the Office of Ceremonies and Events, which could also entail a review by Facilities Management, Security Services, and/or Risk Management before approval.

2. Event Lead Responsibilities

The Event Lead is responsible for the logistical planning and execution of the event to ensure that event requirements are met.

The Event Lead must:

- Have an initial consultation with the Office of Ceremonies and Events if there are any questions in order to complete the Event Approval Form accurately, to the best of their knowledge.
- Complete the Event Approval Form and have the event approved before beginning the planning.
- Ensure that the Event Lead's unit approves and assumes the financial responsibility for the Event prior to committing to the Event, including the responsibility for all reasonable costs incurred by the University in the delivery of the Event (ie. additional security costs).
- Prepare a budget, manage finances, and work with UPEI Financial Services to ensure proper payment and recording of actual expenditures after the event.
- Ensure that all University and other vendors are paid for their services
- Determine whether the requisite staff resources exist within the University organization, or if other resources must be identified within the University to produce the event (the Office of Ceremonies and Events can assist you in various levels of planning if needed).
- Make concessions to account for possible increased traffic flow and parking impacts, particularly during "peak" operational hours.
- Be responsible for securing contracts and insurance when needed.
- Be responsible for securing and overseeing all and any indoor and outdoor venues reserved for the event.
- Ensure that all ticketing and registration arrangements are facilitated through Conference Services, which is financially compliant and can provide reports for received revenue.
- Ensure the event is promoted effectively to the campus community and/or public depending on the event by working with the Office of Ceremonies and Events and the Department of Marketing and Communications.
- Advise when dignitaries are attending an event on campus and give Senior Management adequate time to plan when requesting their attendance at an event.
- Ensure all requests for catering, AV/ITSS, and other required services are placed in a timely manner 10 business days prior to the start of the event.
- Ensure all work orders are placed and confirmed with Facilities Management 10 business days prior to the start of the event.

- Ensure reasonable consideration is given and every effort is made to produce a sustainable and accessible event.
- Identify at least one key university person, if not the Event Lead, who will be in attendance to act as a main contact during the event.
- Ensure an adequate debrief is completed at the end of the event, tracking successes and learnings for future events.

3. Event Approval Process

- a) All Events, with the exception of Non-University Events (see 3b), must be approved by the Office of Ceremonies and Events. To obtain approval, the Event Lead must submit an **Event Approval Form** to events@upei.ca as outlined below by type of event:

For Institutional/Major Events:

- i) Any party who intends to plan, organize, and stage an Institutional or Major Event on-campus must complete the **Event Approval Form** for the event and forward it to the Office of Ceremonies and Events to register and confirm details of the proposed event, preferably 60 days in advance, no later than 30 days prior to the event commencing.
- ii) Any party who intends to plan, organize, and stage an Institutional or Major Event off-campus, which is affiliated with the University through brand association, sponsorship, etc., must complete the **Event Approval Form** and forward it to the Office of the Ceremonies and Events to notify them of the details of the proposed event/activity, preferably 60 days in advance, no later than 30 days prior to the event commencing.

For Partner/General Events:

Any party who intends to plan, organize, and stage a Partner or General Event on- or off-campus, which is affiliated with the University through brand association, sponsorship, etc., must complete the **Event Approval Form**. It must be forwarded to the Office of Ceremonies and Events to notify them of the details of the proposed event/activity, no later than 30 days prior to the event commencing.

High-Profile/High-Impact Events:

If you are planning a high-profile event (example: one that has a visiting dignitary, celebrity, or other such person speaking or in attendance) additional steps may be required before approval.

For All Events:

Any other questions or concerns not mentioned above regarding the proposed event should be reviewed early in the process with the Office of Ceremonies and Events before proceeding with the planning process, particularly if this is a large, high-profile event.

If required, approval for particular aspects of the event must be obtained from the appropriate departments, i.e. Facilities Management, Risk Management, Security Services, etc., and such approval must be confirmed on the Event Approval Form by the Office of Ceremonies and Events.

As per the Event Management Policy, the Office of Ceremonies and Events reserves the right to withhold approval of an Event under the following, non-exhaustive circumstances:

- University policies and procedures or municipal, provincial and federal laws are or will be contravened at any time during the coordination or execution of the Event;
 - Through consultation with other University stakeholders, it is determined that the hosting of the Event unnecessarily puts the community at risk of harm or will irreparably harm the University's reputation or is in conflict with another event that is deemed to have priority.
- b) For all Non-University Events, booked through Conference Services or Athletics and Recreation, the Office of Ceremonies and Events must be informed 10 business days in advance.

An Event Approval Form must be completed for any Non-University Events that involve:

- Minors
- Alcohol
- High risk activity
- Dignitaries
- Reputational risk
- Additional security

If an event is rejected by the Office of Ceremonies and Events, under the direction of the Vice-President Administration and Finance, it will be brought to the President and then the UPEI Board of Governors Property and Asset Committee to rule on a final decision.

4. Event Planning Process

Upon approval of an event, the management of a successful event requires a detailed planning and consultation process. The planning process for events may involve the Event Lead assigning the responsibility for different tasks to a number of people.

Tasks often include:

- Convening an organizing committee and staff/volunteers to plan and execute the event
- Developing a budget/securing financial resources/fundraising
- Following safety and security guidelines and other relevant policies
- Arranging contracts and insurance when needed
- Arranging the venue space and set-up/tear-down for the event
- Arranging catering for the event
- Arranging accommodation and transportation for the event
- Organizing RSVPs/registrations/ticketing for the event
- Arranging ITSS/audio-visual needs for the event
- Requesting Senior Management's attendance and notifying Senior Management of Dignitaries attending
- Promoting the event: arranging for mass communications; design services to create products such as signs, printed or digital materials; photography
- Preparing for event day
- Conducting a post-event evaluation: collecting feedback and reporting on event outcomes to stakeholders

More detailed information on how to plan a successful Event at UPEI can be found in the UPEI Event Planning and Management Guidelines and Appendices.