Event Planning
COMMUNICATIONS & EVENT REQUEST FORM

All events, co-sponsorships, and communications involving UCSB Library's space or name are approved, coordinated, and assessed by the Library's Outreach & Academic Collaboration Department for quality and consistency. To request services from Outreach, complete this form and submit it to outreach@library.ucsb.edu.

A member of the Outreach team will initiate a meeting to review and refine the project, collect additional information, and agree on a timeline and responsibilities. Please submit the form a minimum of 90 days prior to the requested completion or event date to provide sufficient time for planning and production.

REQUESTER

Name: ____________________________
Date: ____________________________ Department: ____________________________
Email Address: __________________ Department: ____________________________

PROJECT REQUEST

Project Name: ____________________________
Requested Services (check all that apply):
☐ Writing/Editorial ☐ Graphics/Design ☐ Media/Publicity ☐ Event

Project or Event Description (be as specific as possible):

______________________________________________________________

Target Audience(s):

______________________________________________________________

Objectives (what would make this successful?):

______________________________________________________________

Requested Completion Date/Event Date(s):

______________________________________________________________

Budget Code (if costs are involved, which budget code should be charged?):

______________________________________________________________
Event Checklist

Preliminary:
- Identify audience
- Identify what would make the event successful
- Check calendar for conflicts
- Budget

Day of Event Details:
- Add to calendar
- Ask Isabella to add to Alan’s calendar if needed for Library welcome/intro.
- Book room (use calendar)
- Book BOPS (invite library-BOPS.ucsb.edu to calendar event)
- Amplification or recording needed? Book Video Services/Instructional Development as needed
- Book IT support (add "library-desktopsupport@ucsb.edu to calendar item)
- Book photography if needed
- Book catering if using
- Gather literature and drape
- Recruit volunteers
- Create timeline and staffing
- Obtain speaker bio
- Write remarks for UL or designate and deliver
- Directional signs
- For SRC exhibition events, load poster to SRC desktop

Publicity:
- Obtain speaker photo
- Discuss publicity with speaker
- Contact subject librarians
- Obtain or create title and description of event
- Add title, description, photo to website
- Flyer/poster
- Distribute flyers/posters
- Other publicity on and off campus
- Add link to pdf of flyer to website

Post event:
- Forward invoices/recharges to person responsible
- If recorded, create title slide and forward to Video Services
- Debrief
- Thank volunteers

Send any video and photos to Rick Stockwood to post

Event Evaluation:
- Event survey

Notes:
Headcount doesn’t measure engagement. One way to measure engagement is by the number of people who asked questions.
Representative Documents: Event Planning

Discretionary Fund Proposal Form

http://cms.uflib.ufl.edu/Communications/DiscretionaryFundProposalForm
Proposal for
FRESHMAN LIBRARY ORIENTATION 2018

August 20 – 27, 2018

Heidi Herr (Special Collections)
Jen Ditkoff (Student Engagement)
Meredith Shelby (Marketing)
Goal
To raise awareness among the student body about the library’s academic liaisons, services and resources.

Objective
To provide an engaging library tour, open house, information session, and table event to encourage interaction with the resources and services of the library.

Desired Outcomes
To increase traffic in the RCO, increase reaches to individual librarians via chat, walk-ins and appointments, and increase website traffic to articles/databases, guides, events/workshops, and other important library webpages. For SC Open house, to introduce and encourage students to participate in Freshman Fellows.

Measuring Effectiveness
Academic Liaisons should be prepared to measure effectiveness by tracking, calculating and submitting data on student and faculty engagement to the Department Director. Marketing will track and submit social media analytics, Word Press analytics, and Google analytics from the library website. The purpose is to measure overall ROI and strategize how to improve the effectiveness of future campaigns. As a first step, we could administer a 2-question survey via the “Class of 2022” Facebook page (managed by the Office of First Year Experience), and the “Intro to Hopkins Course” (administered by the Advising Department).

Activities
Library Tours – Monday, August 20th
11:00-11:30 a.m.
12:15-12:45 p.m.
1:45-2:15 p.m.

Special Collections Fire & Ice
Wednesday, August 22nd, 9:00, 10:00, and 11:00 a.m.

Special Collections Open House
Wednesday, August 22nd, 2:00-5:00 p.m.

Blue Jay Day – Thursday, August 23rd, 5:00 – 7:00 p.m.

Table Runner
We’re requesting the purchase of a table runner that can be used not just for Blue Jay Day, but any library event.

- Table runner: blue (003082)
- Sheridan Libraries shield horizontal white screen print

If Student Programming & Events does not supply table linens, a pair of table cloth(s) will be ordered from Bon Appetit.
Blue Jay Day continued…

**Touch Screen Interactive**
Large tablet or touch screen so librarians can demonstrate to students how to use the library website. If possible, we’d like to order (another) touch screen similar to the one ordered for the DC library, and use this opportunity to prototype student interaction in anticipation for the new Service Desk model. Since the coding is finished, Meredith would upload it to the unit, and swap out the video file for [Brody Learning Commons: A Second Home](https://library.jhu.edu/). Librarians would show students our webpage, along with Instagram, Facebook, Twitter, and Blog. Most importantly, librarians would direct students to the [Subject Guides](https://library.jhu.edu/subject-guides) page to find their librarian.

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**Marketing Campaign**

Meredith will execute an integrated marketing communications campaign:

- **Print**
  - Lav Notes #1: Monday, August 20th
  - Lav Notes #2: Friday, August 31st
  - PocketMaps
  - Daily Grind cup sleeves Avery labels #8164

- **Online Digital**
  - library.jhu.edu “What’s Happening at the Libraries” page slider
  - Social Media
    - Library FB, Insta, Twitter — excluding Special Collections Open House
    - #classof2022 FB page
  - Hub Events
  - Today’s Announcements
  - Sheridan Libraries Blog
    - SC Open House
    - Library Tours
    - Fire & Ice
    - Re-publish blogs on the RCO, online & offline resources

- **Offline Digital**
  - Orca — excluding Special Collections Open House
    - Library Tours
    - Blue Jay Day
    - Swag
    - Visit the RCO
    - Meet Your Librarian
  - BLC Screens

Meredith will contact the Office of First Year Experience to have our swag announcements added to their Facebook page: “Attend these events and pick up your freshman swag!”

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This campaign is part of the Sheridan Libraries Academic Liaisons marketing campaign.
Freshman Library Orientation Budget

Jen Ditkoff will reach out to our various vendors to request free swag for students. Jen has successfully accomplished this in the past, and MSEL has a good reputation with its vendors, so we expect to a positive response. Best scenario would be tee shirts, cups, lanyards, bookmarks, buttons, etc.

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Table Runner</td>
<td>$125</td>
</tr>
<tr>
<td>Bon Appetit table cloth</td>
<td>$24 (pair)</td>
</tr>
<tr>
<td>All-in-one touch screen</td>
<td>$329</td>
</tr>
<tr>
<td><strong>Swag</strong></td>
<td></td>
</tr>
<tr>
<td>Phone silicone wallet 240 @ $0.80 or Phone Popsockets 240 @ $1.50</td>
<td>Friends of the Library</td>
</tr>
<tr>
<td>240 cotton bags</td>
<td>Already purchased</td>
</tr>
<tr>
<td>Blue Jay stickers 4,000</td>
<td>$1,500*</td>
</tr>
<tr>
<td>Micro Sticky Book: 240 @ $1.00</td>
<td>$240</td>
</tr>
<tr>
<td>Library Vendor Swag</td>
<td>Free</td>
</tr>
<tr>
<td>3.3x4” Cup Sleeve Avery labels 150 x 4 @ $12.99</td>
<td>$52</td>
</tr>
<tr>
<td>Mini Size Candy Bars</td>
<td>$22</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 2,492</strong>*</td>
</tr>
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</table>

*Per Shellie, Friends of the Library is willing to subsidize some of the cost on the Blue Jay stickers. Therefore, the final amount RSC Department would pay is TBD.

Remaining swag will be used for year round events and workshops.

Retrospective Summary Report

This campaign should be followed up with a retrospective report to measure the effectiveness of the campaign. See appendix.
APPENDIX
PROJECT> RETROSPECTIVE SUMMARY REPORT
<date>

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<tr>
<td>Sponsor</td>
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<td>Participants</td>
<td>&lt;names and roles&gt;</td>
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<td>Facilitator</td>
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<td>Metrics</td>
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<tr>
<td>Requirements</td>
<td>1.</td>
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<tr>
<td>Process</td>
<td>1.</td>
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<tr>
<td>Project Management</td>
<td>1.</td>
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<td>Technology</td>
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<tr>
<th>Things That Could Have Gone Better</th>
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<tr>
<td>Requirements</td>
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This campaign is part of the Sheridan Libraries Academic Liaisons marketing campaign.
### Things That Surprised Us

<table>
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### Lessons Learned

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### Final Thoughts

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<tbody>
<tr>
<td>Things to Keep</td>
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<tr>
<td>Things to Change</td>
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This campaign is part of the Sheridan Libraries Academic Liaisons marketing campaign.
Event Checklist - Planning

Event:
Date of Event:
Location:
Primary Contact:
Additional Staff:
Number of Volunteers:
Audience Estimation: ___________

Arrangements for All Events:

Communication

- Publicity Plan/Printed Pieces/Signs/Sign Holders
- Add to UNL Events Calendar
- Add to Sharepoint Calendar

Venue

- Room reserved/checked out
- Room set up (please describe)

_____________________________________________________________________________________________
_____________________________________________________________________________________________

- Additional Chairs
- Additional Tables

Project managers are responsible for moving furniture and returning the room to its original arrangement after the event. Options include working with managers for student assistant help, finding library volunteers or working with Moving Services.

Logistics

- Event Staff assignments
- Event Script written

Equipment & Materials:

- CORS Equipment (requires a Footprint)
  - Projector
Event Checklist – Planning

Evaluation:

- Evaluation Sheet OR Assessment Plan

Follow Up:

- Thank You Notes Sent
- Event follow-up discussion
- Final Report

Additional Considerations:

Refreshments:

- Internal:
  - Library cambros (and felt floor squares)
  - Popcorn popper
  - Cooler
  - Ice
- Items to be purchased:
  - Bottled Water
  - Dunkin Donuts items: ________________________________
  - Other Items: ________________________________
- Caterer:
  - Ask participants about dietary restrictions
  - List other menu items: ________________________________

Custodial:

- Notify Custodial Staff
- Request Trashcans/Recycle Bins
Event Checklist – Planning

**Speaker:**
- Confirm date
- Confirm topic/title _________________________________
- Confirm honorarium ______________________________
- Paragraph/Synopsis of presentation for publicity
- Headshot for Publicity
- Speaker biography
- Videographer needed
- Permission to Video-tape signed
- Handouts
- Books to Sell _________________________________

**Photography:**
- Photographer needed/Photo Releases

**Alcohol:**
- Alcohol request (must be completed 6 weeks before event)
- Notify UNLPD (via EMS)

**Large Events (over 100 participants expected):**
- Notify UNLPD

**Program with Dignitaries:**
- Remarks by: _________________________________
- Written by: _________________________________
- Entertainment booked _________________________________
- Invitations
  - Number of Print Invitations
    - Mail by Date ______
    - Design & Text: _________________________________
  - Email invitations needed?
  - RSVP’s
Stony Brook University Libraries inspire learning, research, scholarly inquiry and service in an environment dedicated to the open exchange of ideas and information. The University Libraries are engaged in scholarly, cultural and artistic interactions with Stony Brook University, and its regional and global communities.

General Policies

- All events should advance University Libraries’ Strategic directions and guiding principles, and be introduced in that context at the start of each event. This is an opportunity for library faculty liaisons to consider programs and events that will help them cultivate deeper relationships with their academic departments. We also encourage staff members to submit proposals that engage the wider SBU community.

- We encourage events to be student-centered whenever possible. ‘Student-centered’ are events that can be as equally enjoyable as they are informative, and that events are designed to appeal to students.

- All events involving external departments must acknowledge the University Libraries as co-sponsor or partner in all publicity materials.

- Event proposals should be submitted using the Event Proposal Form by the deadline given.

- If there is a request for funding for any honoraria and/or other expenses to be paid to an external guest speaker, 6 months notice is required.

- The event organizer will receive an email of acceptance, denial, or request for more information prior to semester start date. Review of event proposals will be done a rolling basis.

Updated 6/13/18
Event organizers must provide a brief event description with each proposal they wish to have submitted to the University Calendar and Campus Announcements. This must be completed through the event proposal form.

Recurring events (e.g. series with more than one date) require separate submissions to the Event Proposal Form. Please do not submit them as one event through the form as each date needs to be reviewed individually.

The purpose of all blog posts is to showcase our expertise and to promote the Library's engagement with the SBU community. The event organizer must write one blog post following the conclusion of the event however, it will be at the discretion of the event organizer to write one blog post prior to the event.

All approved supplies must be purchased through Wolfmart with budgetary approval from the ADs. Personal reimbursement for purchase of any supplies will not be approved.

Promotional materials (digital signage, web banners, social media campaigns) are created and designed by the Libraries' graphic designers unless otherwise specified.

The event organizer is responsible for all set-up before and breakdown after event. Please ask for volunteers. All volunteers must secure approval from their supervisors.

It is the responsibility of the event organizer to take attendance and submit to the COWG chair following each event. An event attendance sheet will be provided to all event organizers.
SUL Event Planner Responsibilities

1. Complete Event Logistics Form.

2. Establish a budget.
   - Include catering (food/alcohol), cost of printing/mailing invitations, honorarium, publicity, space rental, travel expenses).

3. Request a Mycode for major (complicated) events from Dean of Administration Services to track expenses.

4. Request a meeting with Library Communications (Pamela McLaughlin and Julie Sharkey) at least two weeks in advance to discuss specific publicity requests once you've completed the Event Logistics Form.

5. Secure mailing list through BSR and/or HR, if applicable.

6. Make all necessary room reservations, including setting up the room and returning the room to its standing seating configuration and layout.
   - Users of Libraries' meeting spaces are expected to set up, take down, and operate their own presentation equipment. Please review AV policy for selected location on the Libraries website.

7. Confirm with Facilities and Security Coordinator that all “after hours” facilities arrangements are set.

8. Make arrangements for any video/photography requirements.

9. If needed, make arrangements for American Sign Language (ASL) and/or Communication Access Real-time Translation (CART) services.
   - When is ASL and/or CART needed. Find out using the ASL/CART flow diagram.
   - Use this form to request ASL and/or CART for your event.
     - Note that two weeks lead time is needed, but one month or more is preferred.

10. Make sure room is cleaned up once the event is over (i.e., having all food, catering items, and trash removed) and securely locked at the end of the event.
Event Logistics Form

I have read and understood the SUL Event Planner Responsibilities [PDF] document: (required)

☐ I agree

Event Contact Information

Name

Email

Phone

Event Information

Type of event: (required)

Make a selection

Is this event open to the public? (required)

☐ Yes ☐ No

Event Title (required)

Event Start Date/Time (required)

MM/DD/YYYY HH:MM AM/PM

Event End Date/Time (required)

MM/DD/YYYY HH:MM AM/PM

Syracuse University Libraries

https://syr.libsurveys.com/event-logistics
SYRACUSE UNIVERSITY LIBRARIES
Event Logistics Form
https://syr.libsurveys.com/event-logistics

**If this is a recurring event, please indicate additional dates/times below:**

**Event location (required)**

**AV Policy**
Users of Syracuse University Libraries' meeting spaces are expected to set up, take down, and operate their own presentation equipment. Please see Meeting Rooms and Classrooms for information about equipment available in specific rooms.

**Room Use**
The group or individual sponsoring the event must ensure that:
- room set-up is returned to its standard configuration, as posted on the website at the conclusion of the event, and
- the room is not left unlocked and unattended at any time during the event and is securely locked at the end of the event.

**Approximate number of attendees**

**Event Description**
For events open to the public, should be suitable for inclusion in event calendars and other announcements.

**Who will be staffing the event?**
May be different from the Contact. (required)

**Catering**

Will food or non-alcoholic beverages be served? (required)
- Yes
- No

Syracuse University Catering Services requires 30 business days’ notice for all events requiring alcoholic beverage service.
Publicity/Services

Other publicity/services needs (check all that apply) *(required)*
- SU News release
- Library News post
- Add to University calendar
- Local media informed
- Written remarks
- Display signs
- Sidewalk sign
- Elevator sign
- None
- Other

Please request a meeting with Library Communications (libcom@syrs.edu) at least one month in advance to discuss specific publicity requests once you’ve completed this form.

Disability Accommodations

- Adding an access accommodation statement on all event announcement materials
- Providing American Sign Language (ASL) and/or Communication Access Real-time Translation (CART) services
- Arranging special transportation
- Booking accessible hotel rooms
- Creating a special seating section
- Hosting event at an accessible location
- Lowering the podium
- Wheelchair access to the stage

Please contact Lisa Moeschel at lmoeschel@syr.edu for more information about the Libraries’ disability services.

Other

Describe other special needs or requirements:

Submit
# EVENT PLAN TEMPLATE 2017

## EVENT NAME

**DATE:**  
**LOCATION:**  
**TIMING:**  
- Setup:  
- Event Time:  
- Tear Down:  

### SOCIAL MEDIA DESCRIPTION

### PARTNERS/VENDORS CONTACT INFORMATION

### VOLUNTEER NEEDS

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<th># of Volunteers</th>
<th>Duties</th>
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### RESOURCES

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### COORDINATOR SHIFTS

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</table>

### FEDS FULL TIME STAFF SUPERVISOR:

### ADDITIONAL INFORMATION
Draft: Event Planning for Therapy Dogs

Event Overview:

Registered volunteers from St. John’s Ambulance with their certified therapy dogs will visit the Library to help ease student stress and encourage wellness in the Library.

This program has been approved by LibExec, Campus Police, the Secretariat, the Safety Office, and PlantOps.

The Student Engagement Committee plans on doing this event each semester during midterms. This time has been selected to prevent overlap with campus partners running similar events.

The Sims Reading Room on the third floor of Porter has been selected as the event location. This is because the enclosed space contains the dogs for those who have allergens or phobias. This containment also helps with crowd management and for PlantOps’ cleanup.

SJA dogs can only stay for an hour to ensure that the dogs are not overwhelmed, and can only see 5 or 6 students at a time. Multiple dogs will ensure that the maximum number of students can visit.

The Library cannot make a donation to a charity, we can only pay invoices. To ensure St. John’s Ambulance receive a donation for their time, please request for the SJA coordinator to invoice the Library for an amount decided upon with the committee co-chairs.

Event Preparation:

- Determine when midterms will be taking place in the semester, and pick a date and time for the event. (St. John’s Ambulance volunteers have better availability after 4:00pm.)

- Check the University Calendar of events to ensure it does not overlap with major campus events (For example, limited parking during convocation).

- Contact SJA for the event request. The SJA coordinator’s name is Andy, and can be reach via email at _________.

- Contact LibExec requesting the use of the Sims Reading Room on the specific dates and times.

- Andy will confirm 1 week from the event the number of volunteers and their names.

- Contact _________ to begin Social Media promotion.
- Contact _________ for website and digital signage promotion.
- Contact Campus Police informing them of the date/time/location of the event. As well as the names of the volunteers.
  - Our contact with Campus Police is the Sergeant of Special Events:
    __________________________

- Contact Parking Services to request both a parking voucher, and for a parking space to be reserved for the volunteer(s) in parking lot ‘D’ (The one beneath Needles Hall).
  - Our contact for Parking Services is: uparking@uwaterloo.ca

- Contact PlantOps to request deep cleaning of the space after the event, and for on-call support during the event in case of biological accidents within the room.
  - Our contacts with PlantOps are Custodial Supervisors:
    __________________________

- Contact Library Facilities to request for queue lines to be delivered to the event space day of the event and specify a pick up date.

- Post signage on the Sims Reading Room in advance of the event warning that the space will be needed on the specific dates.

- Pick up a thank you card from Library Assistant.

- Purchase a thank you gift/library swag for volunteer/dog.

- Print numbers for crowd management. Each dog can see 5 students at a time, for 6 minutes. Do the math to estimate how many people can visit in total. This will prevent a student from needlessly waiting in line only to be disappointed.

- Send an email to all Library staff warning them about the presence of dogs in the Library.

**Day of the Event:**

- Arrive at the event space ten minutes early to ensure the signage is still up, and to warn all patrons within the space that they will have to leave by the event start time.

- Ensure that queue lines have been delivered, then set up the line directing it down the hallway towards the Flexlab.

- Post signs on nearby workstations warning about higher than usual noise levels due to the event.

- Have a volunteer waiting at ‘D’ lot to meet the volunteer and walk them to the event space.

- Clear any remaining patrons from the event room at the start time.

- Prepare a bowl with water for the dog(s).
- Move furniture as needed.
- Let the volunteer and dog acclimate to the space and they will let you know when to begin.
- Have a committee member stand by the door to count off the groups of students that are allowed in at a time. This member will also encourage students leaving to sign the thank you card.
- Have a committee member inside the room with a timer. This member should give the group a 1 minute warning at the end of their session.
- A committee member should wait at the end of the line to hand out numbers, and if needed turn away extra patrons we don’t have space for.
- At the conclusion of the event, help the volunteer leave, remove signage, and reset the furniture, then set aside the queue line for facilities to pick up.

**Event Follow Up:**

- Ensure that SJA sends an invoice to the Library.

- While the event is recent, have an after action meeting with all committee members who helped plan and run the event.
  
  - Cover what went well, what could be improved, what should be stopped. This helps the event evolve and improve. Pass this information along to the group planning the next session.
<table>
<thead>
<tr>
<th></th>
<th>1 Month Before</th>
<th>2 Weeks Before</th>
<th>1 Week Before</th>
<th>Day Before</th>
<th>Day of Event</th>
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<tbody>
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<td>Select Date/Time</td>
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<tr>
<td>Contact SJA</td>
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<td>Contact Lib Exec</td>
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<td>Contact Mary Lynne for Social Media</td>
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<td>Contact Sara for website promotion</td>
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<td>Contact Facilities</td>
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<td>Contact PlantOps</td>
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<td>Contact Parking Services</td>
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<td>Contact Campus Police</td>
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<tr>
<td>Pick up thank you card/gift</td>
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<td>Post warning signage</td>
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<td>Print numbers</td>
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<td>Warning Email to staff about dogs</td>
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<td>After Action Review</td>
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### Student Engagement Committee: Event Resource Expectations

**Overview:**

These guidelines are to govern how Student Engagement events are planned and resourced in the UW Library system. These guidelines are intended to clarify event expectations and the objectiveness of the event planning process. The Student Engagement Committee strives to provide a positive student experience for as many patrons as possible, but must be mindful of and work within logistical constraints. This creates differences in the distribution of event resources across Library locations.

<table>
<thead>
<tr>
<th>Location</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Porter</td>
<td>All major events and initiatives, Library Ambassadors, special events that are specific to the Porter environment or interests (for example, Therapy Dogs).</td>
</tr>
<tr>
<td>Davis</td>
<td>All major events and initiatives, Library Ambassadors, special events that are specific to the Davis environment or interests (for example, Blind date with a science book).</td>
</tr>
<tr>
<td>Musagetes</td>
<td>Select major events and initiatives. Events are identified, scaled and budgeted for as appropriate for the site, keeping in mind the student FTE, distance from main campus, School of Architecture policies and practices, availability of staff to support events, etc. Key events are determined by the Student Engagement Committee chair/co-chairs in collaboration with Student Engagement Committee standing member from Musagetes. Local coordination and hosting is the responsibility of Library staff at Musagetes.</td>
</tr>
<tr>
<td>Witer</td>
<td>Select major events and initiatives. Events are identified, scaled and budgeted for as appropriate for the site, keeping in mind the student FTE, distance from main campus, School of Optometry policies and practices, availability of staff to support events, etc. Key events are determined collaboratively by the Student Engagement Committee chair/co-chairs and the Student Engagement Committee Associated Representative from Witer. Local coordination and hosting is the responsibility of Witer staff and</td>
</tr>
<tr>
<td>AFIW</td>
<td>Each AFIW location organizes their own activities. Coordination with SE events is managed by the Associated representatives from the AFIW locations.</td>
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</tbody>
</table>