**EVENT PLAN:**

|  |  |
| --- | --- |
| **EVENT NAME** |  |
| **Date** |  |
| **Time** |  |
| **Venue** |  |
| [**Security rating**](#_Security) **(A, B, C, P)** |  |

|  |
| --- |
| **STAFFING** *Delete unnecessary fields as applicable* |
| **Event Manager**  |  |
| **Proposer** |  |
| **Internal Event Host** |  |
| **External Sponsor** |  |
| **Other interested parties** |  |
| **Event Staff** |  |
| **Incident Team Leader** |  |
| **Office Based Contact person**  |  |

|  |
| --- |
| **BUDGET**  |
| **Budget holder** | *The internal staff member who signs off all event expenditure* |
| **Budget source** | *Department* | *Cost centre* | *Source of funds* |
| **Estimated budget costs** | £ xxxx | **Actual spend** | £ xxxx |
| **Overspend/underspend?** | £ xxxx/-xxxx*e.g. if you are made aware of any additional expenditure not originally budgeted for, with reasoning / approval notes* |
| **What does the budget cover?** | *e.g. venue, catering, travel etc. (be specific where possible)* |

|  |
| --- |
| **EVENT STRATEGY** |
| **Brief details regarding event**  | *Include context/format of the event* |
| **Event objectives** | *Wherever possible these should be SMART* |
| **Key messages** | *If applicable*  |
| **Outcomes and success measures** | *How will you measure achievement of your objectives? Stats / feedback?* |

|  |
| --- |
| **GUESTS** *Talk through timeline and resources that guest lists take to produce.* [*Guidelines to Producing a Guest List document*](https://communications.admin.ox.ac.uk/event-management-toolkit-compiling-and-managing-a-guest-llist)*. Password protect your guest list. You may wish to add a graph or pie chart with the breakdown of guest types for analysis.* |
| **Estimated total numbers** |  |
| **External guests** | *List VIPs, Community guests, General Public, etc. and include estimated number* |
| **Internal guests** | *Include estimated number* |

|  |
| --- |
| **DRAFT RUNNING ORDER** |
| **Time** | **Action** |
| 09:00 | Set up |
| 09:30 | Guests arrive |
| Etc. | Speeches  |
|  | Carriages |

|  |
| --- |
| **TIME LINE** |
| **Date** | **Action** | **Owner** | **Completed** |
|  | Initial meeting with event stakeholders. Do you need to arrange regular planning meetings?  | Event Manager |  |
|  | [Set event objectives](https://communications.admin.ox.ac.uk/event-management-toolkit-setting-objectives) | Event Manager |  |
|  | Produce Event Plan | Event Manager | Ongoing |
|  | Confirm event date, consider [cultural events and holidays](https://edu.admin.ox.ac.uk/events-0)  | Event Manager |  |
|  | [Produce Event Outline](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B04912555-7B0C-4F6B-A40B-4736182F8BC7%7D&file=EVENT%20OUTLINE%20Template.docx&action=default&mobileredirect=true) and share with relevant stakeholders | Event Manager |  |
|  | [Produce guestlist](https://communications.admin.ox.ac.uk/event-management-toolkit-compiling-and-managing-a-guest-llist) – guest list [template](https://unioxfordnexus.sharepoint.com/%3Ax%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7BA2BF4622-72DC-4F99-B41F-66150920EC58%7D&file=Guest%20List%20template.xlsx&action=default&mobileredirect=true)(password protect your guestlist)And/Or event promotion and advertising plan. | Event Manager |  |
|  | Consider the [accessibility and inclusivity of your event](https://communications.admin.ox.ac.uk/making-events-accessible) | Event Manager |  |
|  | [Guide to planning and hosting events with online elements](https://communications.admin.ox.ac.uk/running-virtual-and-hybrid-events):* [Event Format Selector tool](https://oxford.onlinesurveys.ac.uk/event-selector-tool)
* Platform?
* AV requirements

In-person event, start contacting suppliers for availability and costs:* [Venue search](https://communications.admin.ox.ac.uk/event-management-toolkit-choosing-a-venue)
* [AV](https://communications.admin.ox.ac.uk/event-management-toolkit-audio-visual#collapse1992051)
* [Catering](https://communications.admin.ox.ac.uk/event-management-toolkit-selecting-a-caterer#collapse1988761)
* Photography/Filming
* Design/print for materials
* Music/entertainment
* Other
 | Event Manager |  |
|  | Produce Event Budget- [Budget template](https://unioxfordnexus.sharepoint.com/%3Ax%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B8AA2BE5A-5685-4C63-96FB-4C71ACE323B0%7D&file=BUDGET%20Template.xlsx&action=default&mobileredirect=true) and send to Budget Holder | Event Manager |  |
|  | Design [event registration](https://communications.admin.ox.ac.uk/event-management-toolkit-online-registration-platforms) and [Invitations](https://communications.admin.ox.ac.uk/event-management-toolkit-invitations) and seek approval, if requiredSee [Guidance on GDPR](https://compliance.web.ox.ac.uk/events-and-gdpr#collapse1051561), do you need to include a [privacy policy](https://compliance.admin.ox.ac.uk/creating-privacy-notices)? Do you need to include a [Legitimate Interest Assessment](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/PublicAffairsDirectorate-EventsOffice/_layouts/15/Doc.aspx?sourcedoc=%7B5018926B-B48A-4529-B947-F379134447EF%7D&file=LIA_LegitimateInterest_template2023.docx&action=default&mobileredirect=true) (LIA)? | Event Manager |  |
|  | Consider [Photography/Filming GDPR](#_Photography_Guidance_and)  | Event Manager |  |
|  | Produce [event materials](https://communications.admin.ox.ac.uk/event-management-toolkit-materials) and seek approval, if requiredOr online materials such as PowerPoints | Event Manager |  |
|  | Print/design deadlines for event materials | Event Manager |  |
|  | Finalise event budget, confirm suppliers, sign contracts and raise PO’s. | Event Manager |  |
|  | Send Invitations | Event Manager |  |
|  | Produce [Risk assessment](#_Risk_Assessments) | Event Manager |  |
|  | [Incident plan – appoint an incident lead](https://communications.admin.ox.ac.uk/event-management-toolkit-health-and-safety-guidance#tab-2021411) | Event Manager |  |
|  | Start to work on [briefings](#_Event_Briefings)  | Event Manager |  |
|  | RSVP deadline | Event Manager |  |
|  | Proofing of event materials Do you need to book time with a colleague or external proof-reader? | Event Manager |  |
|  | For in-person events: confirm final numbers, dietary and access requirements with relevant suppliers | Event Manager |  |
|  | Produce table plan (if applicable). Who needs final approval?  | Event Manager |  |
|  | Finalise on-site team of host(s), stewards, security etc and assign roles/tasks for briefings | Event Manager |  |
|  | Send briefings | Event Manager |  |
|  | Send final joining information about the event to attendees (where, when, dress code, photography etc) | Event Manager |  |
|  | EVENT, [guidance on delivering your event](https://communications.admin.ox.ac.uk/event-management-toolkit-delivering-your-event#collapse1997351) | Event Manager |  |
|  | Post event:* Send communications/ survey
* Social media, press, PR
* Post production and distribution of photos and film (once approved)
* Finalise budget, all invoices paid
* Debrief meeting, complete [Post Event Evaluation](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B6047E7B9-52DA-479A-BD5C-310AC670EE18%7D&file=Event%20Evaluation%20template.docx&action=default&mobileredirect=true) and share any lessons learnt with team
* Delete any data no longer needed in line with GDPR (documents, emails, photos, email addresses, mobile numbers, dietary and accessibility info)
* Diarise date for deleting recording, if relevant
* File hard copies if required
 | Event Manager |  |

|  |
| --- |
| **EVENT LOGISTICS**  |
| Invitation format | [Invitation guidance](https://communications.admin.ox.ac.uk/event-management-toolkit-invitations#collapse1987006) |
| Communications/ Promotion | Discuss with your Head of CommunicationsWho might be interested in your event, internally and externally, pre- and post-event?Will there be a website? (link to website)What will be available online? – live streaming, video, podcastSocial media: Facebook, Twitter etc. (consider paid advertising)Who is in charge of online material? – Internal/External? |
| Press | Speak to your college/department comms lead in the first instance Should the Public Affairs Directorate Press Office be alerted/involved? Email: news.office@admin.ox.ac.uk |
| Dress code | [Dress code guidance](https://communications.admin.ox.ac.uk/event-management-toolkit-dress-code)  |
| Accessibility  | [Accessibility guidance](https://communications.admin.ox.ac.uk/making-events-accessible) |
| Religious/Cultural considerations | Consider sensitive dates, awareness of the needs of those attending |
| Equality, Diversity & Inclusivity considerations and provisions | Venue access information and hearing loops (note below)Captioning for all video produced?Recording available (on request) to those that cannot attend?Quiet spaces at all event venues / quiet sessions for viewing exhibits?Availability of British Sign Language interpretation onsite?Inclusive wording of invitations and joining instructions |
| Venue | AddressVenue contactTravel information (parking, public transport)Furniture available?Cloak room?Staff outmess? Does the venue offer a hearing support system? WIFI?Accessibility of the venue ([Oxford access guide](https://www.accessguide.ox.ac.uk/)) If a non-University building (including Colleges) request copy of Public Liability Insurance and risk assessment.  |
| Furniture required | Extra furniture required. i.e. Lectern, occasional seating etc. |
| Branding at event | i.e. Lectern branding, banners |
| Event materials | Material i.e. Brochure, Table Plans, Menus etc.Consider design, print, proofing deadlines? [Event material guidance](https://communications.admin.ox.ac.uk/event-management-toolkit-materials#collapse1987201) |
| **Content**List of pages and content | **Provided By** |
| General event materials | Badges, reserved signs, guest lists (preferably on encrypted iPads) etc. |
| Catering | **Menu** | **Provider** |
| As specific as possibleInclude drinks available and limitsInclude staff food if supplying |  |
| AV | Who is your supplier?OnlineGuidance for [Virtual events: (1) Pre-event planning](https://communications.admin.ox.ac.uk/planning-pre-event). See tabs “Selecting online tools and platforms” and “Finding a venue and AV equipment”In-personWhat is required? i.e. lectern, sound, lighting, staging, microphone (lapel, lectern, handheld), projector screen, laptop, connections, clicker, technicians during the event, stage etc. Do you need rehearsal time?Hearing support system?  |
| Photography/ Filming | Who is the photographer/ film crew?What type of film/photos are required? And of who?Who is the audience? Internal reference only, publicly available etc. How will they be shared?Film, who is responsible for editing and producing final cut?**Have you** [**filled out the photography to do list**](#_TO_DO_LIST)**? (**[**photography guidance**](#_Photography_Guidance_and)**)** |
| Transport | Include specifics i.e.Type of flight included, meet & greet and airport transfers required?Who will book?Specific booking info once known.Who needs car booked? Parking space? Taxi? Driver contact details. |
| Other suppliers  | Music, flowers, hotel accommodation etc  |
| Signage | Directional, [Photography/filming notices](https://compliance.admin.ox.ac.uk/photography-and-gdpr-toolkit) and accessibility  |
| Security | Consider contacting the Proctors’ Office proctors.office@proctors.ox.ac.uk , who co-ordinate the security planning and operations at University events, ceremonies and VIP visits. See the [University's Code of Practice on Meetings and Events](https://academic.admin.ox.ac.uk/policies/meetings-and-events#collapse2507331). Event security categorisation: A - invite Proctors’ Office to a planning meeting early on in the process.B - Proctors Office need to be made aware of eventC - no action necessaryP - it is protocol for Proctors’ Office to have a presence at this event |
| Incident response planning | Click here for guidance on [Incident Response Planning](https://communications.admin.ox.ac.uk/event-management-toolkit-health-and-safety-guidance).  |
| Risk assessments  | Refer to the [events health and safety guidance](https://communications.admin.ox.ac.uk/event-management-toolkit-health-and-safety-guidance)before completing your [Risk Assessment (template](https://unioxfordnexus.sharepoint.com/%3Ax%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B054189E0-BD2D-40DF-B620-FA621DF8378A%7D&file=2022%20Event%20Risk%20Assessment%20Template%20v6.xlsx&action=default&mobileredirect=true)). You should share your risk assessment with venues, suppliers and the Proctors’ Office (if relevant), in good time ahead of the event, and communicate your risk management plans in your event briefings.  |
| GDPR | See [GDPR guidance](https://compliance.admin.ox.ac.uk/events-and-gdpr#collapse1051406)See [LIA guidance](https://compliance.admin.ox.ac.uk/lia) |
| Event briefings | * [Event Manager's Briefing](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B7657F60D-C043-485E-9C75-07FA03DEE9A8%7D&file=Event%20Manager%27s%20Briefing.docx&action=default&mobileredirect=true)
* Speaker: Running order, Guest list, seating plan, Biographies
* [Senior Internal briefing](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B16F24B75-85D4-476B-95C4-0DA1CEA9C158%7D&file=EVENT%20BRIEFING_VC%20Template_2018.docx&action=default&mobileredirect=true) (e.g. internal host)
* VIP guest briefing
* Suppliers
* Event Stewards
* Other
 |
| Gifts | **Recipient** | **Given by** | **Gift** |
| Post event follow up | e.g. Sharing recordings or transcriptsSurveyThank you lettersMaterial sent to guests e.g. ppt presentationsAttendee lists (noting GDPR regs) |
| Map | e.g. venue location(s) and/or parking / supplier access |
| Misc. requirements | Event InsuranceTranslationOther... |
| DARS/ CRM | What attendee information will go on DARS/CRM i.e. event attended, contact made etc. |
| Filing required | **Electronic** and hardcopy if requiredInclude file path for electronic filing |
| Lessons learnt  | *Reminder of lessons learnt from previous event evaluation (if applicable)* |
| Post event evaluation | *Use this space to note down points for review post event* |
| Appendices | 1. **Proformas**
* Budget
* Table Plan
1. **Tickets/Invitations**
2. **Maps**
3. **Briefings**

Etc. |

## **Photography Guidance and To Do List**

For further information about the below topics:

* [University guidance on GDPR and photography](https://compliance.admin.ox.ac.uk/university-guidance-on-gdpr-and-photography)
* [Photography and GDPR toolkit](https://compliance.admin.ox.ac.uk/photography-and-gdpr-toolkit)

|  |  |  |
| --- | --- | --- |
| What sort of photos are you planning? | Individuals or small groups  | Get written consent ([consent form](https://unioxfordnexus.sharepoint.com/sites/ADMN-UASMosaicDocumentHub/Compliance/Forms/AllItems.aspx?id=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming%2FPhotography%20consent%20form%20%2D%201021%20v1%2E1%2Epdf&viewid=211b8c90%2Dd243%2D4e3d%2D9b19%2Df6d6c78803ef&parent=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming) available in the Photography Toolkit). Consent is not required for University staff, but may be a courtesy. |
|  | Large groups where people can’t really be identified | Consent not necessary, but provide perimeter notices at the venue ([template available in the Photography Toolkit](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7B4884790D-3B4A-4589-BE60-52073425EA7C%7D&file=Photography%20perimeter%20notice%20template.docx&action=default&mobileredirect=true)) For events such as lectures, consider having a photography/filming-free seating area.  |
|  | VIPs  | Get written or verbal consent and keep a written record of this. |
|  | Children under 13 | Get written consent from parents or guardians. This can be using the [consent form](https://unioxfordnexus.sharepoint.com/sites/ADMN-UASMosaicDocumentHub/Compliance/Forms/AllItems.aspx?id=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming%2FPhotography%20consent%20form%20%2D%201021%20v1%2E1%2Epdf&viewid=211b8c90%2Dd243%2D4e3d%2D9b19%2Df6d6c78803ef&parent=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming).  |
| What are you going to use the PHOTOS for? | Promoting an event and/or future departmental activities  | Ensure that information detailing how you will use the images/data is included on the consent form (e.g. reports; newsletters; website; social media channels; promotional material; inclusion in the departmental archive, which documents the history of the department). |
|  | Websites & social media | Publishing an image online or on social media is a potential disclosure to the world at large. Take particular care to obtain appropriate consent - if in doubt, do not publish the image. Do not post pictures of children on social media unless you have specific written consent for this channel from the parent/guardian. Do not use Flickr, either for posting or storing photos. |
|  | Departmental archive | If you plan to retain images long-term as part of a departmental archive, ensure you gain consent for this (e.g. in the purposes field of the consent form, add “inclusion in the departmental archive, which documents the history of the department”). Only keep a small number of images for this purpose. |
|  | Sharing with external organisations | You must have a data-sharing agreement in place to share photos with a third party. If there is an existing agreement with the other party, this may already address data protection. If no such agreement exists, use the [Data Sharing Agreement](https://unioxfordnexus.sharepoint.com/%3Aw%3A/r/sites/ADMN-UASMosaicDocumentHub/_layouts/15/Doc.aspx?sourcedoc=%7BE43198D4-B495-4D87-AEEE-E48CC2A921C9%7D&file=Data%20sharing%20agreement%20template%20v1.1.docx&action=default&mobileredirect=true) in the Photography Toolkit. |
| How long do you plan to keep them for? | 3 to 5 years is acceptable | Don’t keep photographs you don’t need. Select the best ones and delete the rest. A retention schedule is required, and you should be diligent about adhering to it and clearing out photos on a regular basis.  |
| Where are you going to Store them? | Cloud storage | A contract must be in place and third-party security assessment done before using. The University has a contract in place with Microsoft, which covers OneDrive, Teams and SharePoint storage.Flickr is not acceptable as a storage mechanism. |
|  | University network or database | Ensure you have restricted-access arrangements in place. Email IT Services or your departmental IT if you are not sure of what access arrangements there are.  |
|  | University Image Library | The University has its own [image library](http://images.ox.ac.uk/) - a shared bank of images for the University of Oxford and its constituent colleges.To submit images to be included in the library:* Send the gallery link and the hi-res image links to Paul Chinn. If there are any notable points to mention, send these as well. For example, if the Chancellor and the Vice-Chancellor are present in photos, permission needs to be gained from both before any photos are published.
* Paul and his team will decide which pictures they would like to use, and will confirm with you for information.
* You will receive a keyword spreadsheet to fill in for the photos selected.
 |
|  | CD or memory stick | Must be kept in locked storage with appropriate documentation. |
| WHERE ARE YOU GOING TO STORE THE CONSENT FORMS? | Digitally | Keep on a network drive with limited access. Shred the hardcopy. You need to have a retention period for the forms, which mirrors that of the associated images.  |
|  | Hard copy | Keep in locked storage, with appropriate documentation. A retention period is required. |
| who is going to take the Photos? | Professional photographer | You must brief them on the procedure for consent before the event, and provide them with copies of the consent form. |
|  | Member of staff | You must brief them on the procedure for consent before the event, and provide them with copies of the consent form.If they are using their own equipment, they should delete all the photos once they have transferred the photos to you – they should not keep copies. |

# **TO DO LIST**

|  |  |
| --- | --- |
| Pre-Event | **COMPLETE?** |
| Consent Forms | [Complete the form](https://unioxfordnexus.sharepoint.com/sites/ADMN-UASMosaicDocumentHub/Compliance/Forms/AllItems.aspx?id=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming%2FPhotography%20consent%20form%20%2D%201021%20v1%2E1%2Epdf&viewid=211b8c90%2Dd243%2D4e3d%2D9b19%2Df6d6c78803ef&parent=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming) with details of how the data will be used, stored and shared. |  |
|  | Do you need to send out the consent forms to parents/guardians before the event? |  |
|  | You **could** ask for consent on an event booking form, but only if the booking is definitely undertaken by the person attending - booking for several people on one form wouldn’t work. |  |
|  | If you are sending joining details to guests, have you stated that there will be photography and or filming at the event? |  |
| PHOTOGRAPHY AGREEMENT | Do you have a signed agreement in place with the photographer? [A University photography agreement template](https://unioxfordnexus.sharepoint.com/sites/ADMN-UASMosaicDocumentHub/Compliance/Forms/AllItems.aspx?id=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming%2FPhotography%2DVideo%20agreement%20form%20v1%2E1%2Epdf&viewid=211b8c90%2Dd243%2D4e3d%2D9b19%2Df6d6c78803ef&parent=%2Fsites%2FADMN%2DUASMosaicDocumentHub%2FCompliance%2FInformation%20Compliance%2FPhotography%20%26%20filming) is in the Photography Toolkit. You must have an agreement in place for every event, regardless of whether you have used the photographer before.Have you identified the specific people you want to photograph and has this been added to the photographer’s briefing? |  |
| THIRD PARTY SHARING AGREEMENT | If you are sharing photographs with a third party, do you have a [signed agreement](https://compliance.admin.ox.ac.uk/third-party-processors#collapse3266247) in place? |  |
| On-site |
| Consent Forms | What size consent forms do you plan to use? An A4 version – in an editable PDF – is available to [download from the Photography Toolkit](https://compliance.admin.ox.ac.uk/photography-and-gdpr-toolkit). A pad of printed A5 forms is available from the Public Affairs Directorate (public.affairs@admin.ox.ac.uk). The A5 size is designed for events, and does not include the privacy notice on the rear. This means you must have the privacy notice clearly visible at the event (e.g. at the registration desk), and it must be brought to the attention of everyone who is photographed. An A3 version is available to download from the Photography Toolkit |  |
|  | Have you printed out enough consent forms? Will the photographer be responsible for securing people’s consent, or will you have a member of staff at the event who is responsible for this? |  |
| Opt Out | Have you got options in place for those who don’t want their photo taken? e.g. a photography-free space or different coloured lanyards / badges |  |
| VENUE NOTICES | Have you made it clear that photos are being taken at the event (even if you are only planning on large group photos?)Template photography (and filming) notices are available to download from the [photography toolkit](https://compliance.admin.ox.ac.uk/photography-and-gdpr-toolkit). |  |
|  | Have you clarified with members of staff taking photos the requirements around consent and social media use? |  |
| post-event |
| STORAGe & DOCUMENTATION | Have you got this organised? Have you established a standard practice so that, if you leave, the photographs could still be found? Would you like to submit any images to the University Image Library? See the guidance in the table above. |  |
| WITHDRAWAL OF CONSENT | Have you established what would happen if someone withdrew their consent? Now, or in three years’ time? |  |