Initiative Planning Worksheet

1. Names of UDRs and Their Department(s)/Program(s) Who are Planning the Initiative

Name	Department/Program

2. Initiative Title

3. Initiative Description

4. Initiative Date(s). Check the University and your department/program calendars to avoid conflicts.

5. Initiative Time(s) and Location (if applicable)

6. Will you be collaborating with other organizations or departments that are not represented by a UDR? If so, list and indicate who will be responsible for contacting each organization.
    Things to think about:
    - Are there other invested departments/programs in your topic/initiative?
    - Is there an opportunity here for you to engage alumni, faculty, and staff?

Responsible Person	Department/Organization

7. How do you intend to keep your department/program and other involved parties informed of what you are planning and your progress? Who do you need to keep informed?

8. Who is your target audience?
    Things to think about:
    - How wide a net to you intend to cast?
    - Are you targeting a specific population?

    Check All That Apply:
    ☐ Declared Majors/Minors
    ☐ Potential Majors/Minors
    ☐ Generally Interested Students
    ☐ Faculty
    ☐ Other; please describe:

9. How many people do you expect at your event or to participate in your initiative?
Things to think about:
- What is the critical mass for success?
- Is there a critical mass?

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10. Initiative Goals: What do you hope to accomplish? How will you measure success?

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11. Space and Media Requirements
a. Do you need an on campus space for your initiative?

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b. How will you choose and book a space and decide room set up?

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c. Who is the person responsible for reserving the space?

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d. What are your media requirements?

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e. If necessary, who is the person responsible for submitting media requests?

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12. Food Requirements, if necessary
    Thing to think about:
    - Is food the main attractor or is the programming or outcome the draw?
    If you plan to serve food:
    a. What food will be served?

    b. Where will the food be purchased?

    c. Who will order food?

    d. How will food be paid for?

    e. Who will either pick up food or arrange for food delivery?

    f. If food is being delivered, who will meet the delivery person?

13. Event Supply Requirements
    a. What event supplies or technology are needed?

    b. If they can be borrowed, from where?

c. Who will purchase/obtain the needed event supplies?

d. Where will they be purchased?

e. How will they be purchased?

14. Budget Requirements - Thing to think about: What budget items are adding value for your guests?
    a. What is a realistic total budget for this initiative? Please refer to the 'Common Costs' document.

    b. Complete the 'Budget Planning Worksheet'.

15. Funding Requirements
    a. Where do you expect to get funding?

    b. Who will be responsible for submitting the funding requests for each source of funding?
       Note: You must submit your online UDR Funding Request at least 2 weeks in advance. Check in with your department BEFORE you check in with DAS for funding.

16. Marketing Plan and Publicity
    a. What strategies will you employ to get the word out to your intended audience? Refer to 'Publicity and Promotion' document for ideas.
       Check All That Apply and list responsible person's name next to each selected item.
       ☐ Flyers/Posters Facebook Event Screen Ads UDR Calendar
           Responsible Person: _____
       ☐ Student Union Announcements
           Responsible Person: _____
       ☐ Listservs
           Responsible Person: _____
       ☐ In Class Announcements
           Responsible Person: _____
       ☐ Chalking
           Responsible Person: _____
       ☐ Other; please describe:

    b. Who will design the publicity announcements and/or flyers? **Please create a draft publicity announcement.** Be sure to indicate that this is a UDR sponsored initiative.

       Information to include on announcement:

17. Who will handle RSVPs and/or signing people into event or initiative? What information do you want to obtain from attendees/participants and what will you do with that information?

18. Who will be involved with the post-initiative evaluation and with whom will you share your evaluation? For some ideas about questions to reflect upon, refer to the 'Post Initiative Evaluation' document.

19. Who will submit the required UDR Activity Report?