

Event Proposal Form (EPF) Approval Process

Overview

1. **Owner:** Susan Kimberley, Senior Event Planner (W362K)
2. **File format:** pdf form, editable in Adobe Acrobat
3. **Distribution:** Available at <http://ada.schulich.yorku.ca>
 - a. From the Teaching & Learning menu, select Rooms, Trips & Clubs
 - b. Select the Clubs & Club Events tab (Tab 4)
 - c. The EPF is available for download under the Student-Organized Events section
4. **Requirement Criteria:** As per the Schulich Policy on the Responsibilities of Schulich Student Organizations (rev. April 2013), Appendix 2, an EPF is required for all 'events' and is not required for 'meetings'. An 'event' involves one or more of the following: [1] external participants [speakers, panelists] and [2] non-trivial costs, [3] catering services and/or [4] any use of non-classroom spaces (auditorium, Marketplace, lounges, etc.). The definition excludes case competitions that take place outside of Schulich.

Workflow

The steps below follow a sequence. The process may progress from one step to the next only once ***all*** previous steps have been completed.

To complete an EPF, a student initiator may continue to complete the process in paper format, going to see all required parties in person. As an alternative, the first approval step (submission to the UBC/GBC President) may be done electronically.

1. Student initiator accesses at <http://ada.schulich.yorku.ca/teaching-learning/room-booking>
 - a. Select the Clubs & Club Events tab (Tab 4)
 - b. The EPF is available for download under the Student-Organized Events section
2. Student initiator completes and saves EPF form in electronic format up to and including "Detailed budget attached", if required.
3. Student initiator sends completed EPF pdf form to student government president by e-mail
 - a. May be sent from Schulich and/or alternate e-mail address of student initiator to Schulich and/or alternate e-mail address of student government president
 - b. Written proposal and/or detailed budget attached as separate file(s) as required. At this point these files become a part of the EPF and any further reference to the EPF in subsequent steps pertains to the pdf form and any relevant attachment(s). If such attachment(s) are relevant, they must be appended at this step in the process.
4. Student government president evaluates proposal (including written proposal and/or detailed budget attachment(s) as applicable)
 - a. If approved:
 - i. Complete "1. Sanction from Student Body" line on EPF including Approver Name, Typed initials, Date, and Comments (Yes/No) and save updated file
 1. In case of any comments, include these in the body of the reply e-mail to the student initiator
 - ii. Send updated file (including approval) back to student initiator by e-mail
 - iii. Move to step 5

- b. If declined, send e-mail to student initiator explaining reasoning and request for revision(s) and revert to step 2.
5. Student initiator goes to see the Senior Event Planner (Susan Kimberley, W362K). This may be done on a drop-in basis.
 - a. When going to see Susan Kimberley, student initiator must be prepared with a paper copy of the EPF.
 - b. Following discussion with Susan Kimberley
 - i. If approved, Susan Kimberley will:
 1. Complete “2. Event Planning & Logistics” line on the form
 2. Complete the entire column called, “Require to Sign?” on the EPF form. If a signature is required, she will write “SK” in the appropriate field and if a signature is not required, she will write “No.”
 3. If further approval is required, move to step 6.
 4. If no further approval is required and the event is either off-campus or requires non-classroom space booking, Susan Kimberley will oversee approval/arrangement (in the case of non-classroom space) of such details. Once approved, Susan Kimberley will send a confirmation e-mail to the student initiator and the appropriate student government (ubc@schulich.yorku.ca for UBC and/or gbcvp@schulich.yorku.ca for GBC) for posting the event to the student calendar(s). Move to step 9.
 5. If no further approvals or space bookings are required, move to step 9.
 - ii. If declined, any gaps and/or further action will be indicated on the EPF by Susan Kimberley. Student initiator must complete any such step(s) and revert back to the beginning of step 5.
6. Student initiator takes EPF, including any applicable attachment(s), to the next required approver – based on the requirements specified by Susan Kimberley.
 - a. If approved:
 - i. Complete the corresponding line in the sequence including Typed initials, Date, and Comments (Yes/No)
 - ii. Move to step 7
 - b. If declined, send e-mail to student initiator explaining reasoning and request for revision(s) and revert to step 6.
7. Repeat step 6 as many times as required based on required approvers as specified by Susan Kimberley.
8. Student initiator takes EPF form/package to the office of the Associate Dean, Academic (N230).The ADA Office will:
 - a. Secure (a) room(s);
 - b. Complete the “Classroom(s) booked” box on the EPF; and
 - c. Send a confirmation e-mail of the room booking to the student initiator, Susan Kimberley, and the appropriate student government (ubc@schulich.yorku.ca for UBC and/or gbcvp@schulich.yorku.ca for GBC) for posting the event to the student calendar(s).
9. The EPF process is hereby complete.
10. If any revisions to the event are required, the student initiator may send an email with the revision request to the appropriate parties for guidance on how to proceed.