

Event Planning Resources for New Student Leaders

April 2021

CONCEPTUALIZE AND ENVISION YOUR EVENT

- Who is on the event planning team? Assign tasks like:
 - Programming
 - Logistics (venue, AV, food and drink, virtual)
 - Finding speakers
 - Funding
 - Invitations/RSVP
 - Promotion and Marketing
- What is the purpose or objective of the event?
- Will there be a theme?
- What is the programming (speakers, activities, etc.)?
- Who will attend this event?
- Who will be in charge of promotion and marketing, reserving the venue and other logistics, and organizing your team to obtain sponsors?
- Who will sponsor the event?

PROGRAMMING

Think about the objective or purpose and decide what kind of programming would best achieve the event objectives: a keynote speaker, a panel, a workshop, a reception, an auction, virtual or a combination of in-person and virtual. Do you know people who can deliver content for your event? Contact them **early**.

Speakers

If interested in inviting GSM alumni to speak at the event or participate in any way, contact the Assistant Director of Development [Karim Zelenka](#) at least 12 weeks prior to your event. Karim can help in researching potential alumni connections and match your event to specific alumni, business partners, or donors. If you recruit alumni independently, please let Karim know so he can quantify engagement for the school.

Always Thank Sponsors and Participants

Thank sponsors and alumni both verbally and in writing. Thank any alumni who donated their time and energy to help. **A handwritten thank you note has the most impact.** It's important to remember that your actions reflect the GSM community. If alumni feel that their efforts are not appreciated, their willingness to participate in future events may diminish. If the alumnus speaks at a student event or helps in a major way, please provide them with a gift or small token of appreciation. Small items may be purchased from the UC Davis bookstore for this purpose, or Karim Zelenka will have swag items available. (For a list of information, please see pages 29-31).

LOGISTICS

Risk Management Insurance for your Club Event

Off-campus GSM events are only covered by insurance if the event is UC Sponsored and UC Supervised. Off campus club events are not covered by insurance, but in many cases the contracted venue will offer event insurance or will have suggestions regarding event insurance.

Securing a Venue

Events in Gallagher Hall or Bishop Ranch Facilities

Event Management System (EMS) and Club Websites

Post club events on club websites, the GSM Event Web Calendar, and add them to the Event Management System (EMS) – maintain and keep all content current.

Gallagher Hall

To reserve space at Gallagher Hall, go to <http://ems.gsm.ucdavis.edu/VirtualEMS/>. Please inform the Full-Time program manager, [Jacqueline Romo](mailto:jmromo@ucdavis.edu) (jmromo@ucdavis.edu), about this reservation.

UC Davis Medical Center (Sacramento Campus)

To reserve a space or facility at the UC Davis Medical Center, contact the Interim Sacramento MBA Program Manager, Sayana Saing (ssaing@ucdavis.edu) and the Sacramento MBA Instructional Operations Manager, [Dedan Sims](mailto:sims@ucdavis.edu) (sims@ucdavis.edu).

Bishop Ranch

To reserve space at Bishop Ranch, go to <http://ems.gsm.ucdavis.edu/VirtualEMS/>. Please inform the Bay Area MBA Program Manager, [Sayana Saing](mailto:ssaing@ucdavis.edu) (ssaing@ucdavis.edu) and the Bay Area MBA Instructional Operations Manager, [Sergio Esquerre](mailto:sdesquerre@ucdavis.edu) (sdesquerre@ucdavis.edu) about this reservation.

UC Hastings (San Francisco)-MSBA

To reserve a space or facility at the UC Hastings facility, contact the Associate Director for the Master of Science in Business Analytics, [Shachi Govil](mailto:shgovil@ucdavis.edu) (shgovil@ucdavis.edu) or the Admissions and Operations Specialist, Camille Mack, msba.admissions@gsm.ucdavis.edu.

UC Davis

To reserve a space at a UC Davis main campus venue, go to **Conference and Event Services** at <http://www.cevs.ucdavis.edu>.

Zoom

For virtual events that will be longer than 45 minutes or require up to 300 participants, it is important to secure a licensed zoom account rather than the free account that UCD students are automatically enrolled. [Here](#) is more information regarding the UCD licensed zoom account.

Reserving other spaces

Each club or student group is responsible for identifying a non-UC Davis space that would be appropriate for their event needs. Individuals will sign a contract on their own. To reserve a non-UC Davis venue, please work with the event planner for the venue and ensure that the club has an **official contract** with the venue if applicable.

- ✓ Contact your program managers for help with identifying off campus venues for your event.
- ✓ For more information on contracts, contact the Assistant Director of Administration and Human Resources, Michele Goodman (mlgoodman@ucdavis.edu).

Audio Visual Needs On-Prem

Consider your presenters' AV needs so the venue knows how to set-up:

- ✓ PowerPoint
- ✓ Video
- ✓ Video Conferencing
- ✓ Internet Access / Wireless Account Access (google docs etc)
- ✓ Room capacity for power outlets (for laptops)
- ✓ Screen
- ✓ Projector
- ✓ Microphone
- ✓ Laptop Computer

Audio Visual Needs Virtual

Consider your presenter's needs and how you want the audience to participate in the virtual event. Organize a production team well in advance of the event and assign tasks each member of that time like, managing the waiting room, chat feature, advancing the presentation, running videos, working with the annotation tool, and live question and answer. This team during the event will be the "backstage team".

Don't forget to schedule a pre-production rehearsal at least a week in advance so you have time to fix any issues and figure out how images are being projected.

Catering On-Prem

If your event is on campus and your club is not self-catering, you must use an approved caterer from the Conferences and Event Services website here http://www.cevs.ucdavis.edu/dept_cont/caterers/. If the event is off campus, you can use the caterer of your choice unless the venue has restrictions.

Alcohol Consumption On-Prem

California law states that persons under 21 years of age may not be furnished, served, or given alcoholic beverages. Checking identification for proof of legal age is required unless the group is limited to persons at least 21 years of age. When you plan your events, non-alcoholic beverages and food must be provided or available during the entire period alcohol is served.

It is illegal to drive after consuming excessive amounts of alcohol in any form. If you know that you and your guests will have to drive after consuming alcohol, limit your consumption to no more than one drink an hour. Have someone available who will not drink alcohol and will be a designated driver. For events on campus, you can call Aggie Host or Safe Rides Services at (530) 752-2677. More information please see the [California Driver Handbook – Alcohol and Drugs at https://www.dmv.ca.gov/portal/dmv/detail/pubs/hdbk/actions_drink](https://www.dmv.ca.gov/portal/dmv/detail/pubs/hdbk/actions_drink).

Alcohol Service On-Prem

You must fill out alcohol permit from CEVS website a month before your event if you plan to serve alcohol.

Guidelines

<http://www.cevs.ucdavis.edu/Public/content.cfm?CONTENT=61>,

Online permit

http://www.cevs.ucdavis.edu/dept_cont/alcohol/index.cfm?page=form and

Permit flow-chart

http://www.cevs.ucdavis.edu/public_files/event/file/Alcohol%20Service%20Requirement%20Flow%20Chart.pdf

Alcohol Consumption Restrictions

- ✓ Events with alcohol must begin after 5 p.m. M-F
- ✓ During the one hour lunch time weekdays 12-1 p.m.
- ✓ Afternoon on Saturday, Sunday, and holidays
- ✓ Alcohol service must not exceed 4 hours and 1 drink/person/hour. Assume only 70% people will drink alcohol
- ✓ Non-alcoholic drinks & food must be available at events where alcohol will be served

- ✓ If on the UC Davis main campus, again you can arrange for Aggie Host Security Service to escort attendees to their cars at night by going to the website here http://police.ucdavis.edu/campus_security/aggie_host.html. They also provide special services for events. Call them at (530)-752- 2677. You should set this up at least 3 weeks prior to event.
- ✓ The program manager at the location will sign-off on the alcohol permits.

For additional assistance regarding *catering*, *venue reservation* and *obtaining an alcohol permit*, contact your program manager or Diana Vail (devail@ucdavis.edu)

Choosing a Date, Time, and Location for Your Event to Maximize Attendance

Remember to consider the following for both on-prem and virtual events:

- ✓ Class schedules (review EMS bookings)
- ✓ Other events/activities (workshops, IMP schedules, finals)
- ✓ Holidays, including religious holidays
- ✓ Conflicts and complements (for instance, when most people are already available and present in one location. For example, schedule a short event between classes)
- ✓ Venue and speaker availability

FUNDING AND SPONSORSHIPS: GETTING AND SPENDING MONEY

GSM Funding

Yearly funding for student-organized events is obtained from the GSM and is distributed to the Full-Time ASM who will then allocate the earmarked funds to the Sacramento MBA and Bay Area MBA bank accounts.

Each individual program will be responsible for budgeting the individual accounts and tracking all expenditures.

In 2018-2019 the GSM increased the budget by 21%.

Fund Targeting and Allocations

These funds are for targeted support of the following events and activities:

- GSM Olympics
- UCD All-Stars
- The Big Party
- Capital Connections
- Other Programming (determined by the GSMSA)

How to Track the Funding

In accepting these funds, each program agrees to provide the following financial reports:

- A summary of GSM Olympics, UCD All-Stars, The Big Party, and Capital Connections including revenue, expenditures, and attendance by program within one month of the event
- A quarterly report on the use of Part-Time MBA Seed Funding and other Programming, including revenue, expenditures and attendance by program.

Each program is required to submit a final report. The report from each program may be consolidated into one document and is a final request for the following year's funding needs. This report should be worked during the month of June and should be submitted no later than **July**. This will allow enough time for the GSM to consider the request, determine the available funding and issue a check before the start of the next academic year. **It takes 2-6 weeks** for the check to be cut and sent to the GSMSA.

Each student club that needs event funding will follow the instructions to request funding from the student leaders at their locations.

GSMSA Background. The GSMSA was established during the 2017-2018 school year to provide student governments at each location better opportunities for multi-program collaboration and for a more efficient way to secure off campus venues and manage their own program funding.

Sponsorships & Fundraising

For University purposes, fundraising is defined as “any activity in which money is collected on campus.” Even if all you wish to do is break even or recover costs, your activity will be considered ***fundraising***.

Prior to doing any fundraising for your **501C 3**, you must contact either Senior Director of Development and External Relations, Lana Watts or Assistant Director of Development, Karim Zelenka to discuss your ideas at least 12 weeks prior to your event.

Contacting Development and External Relations first will ensure a streamlined process for fundraising and contacting alumni.

We recommend that you create a sponsorship packet that includes giving levels (please see attached sample). Avoid offering “incentives” that have what is considered “Fair Market Value” i.e. offering free “stuff” or tickets (unless they are free) in exchange for a donation/sponsorship. This complicates the process. Try to stick to the main benefit of marketing exposure and access to top tier student talent.

Involving GSM Alumni as Sponsors

- ✓ Schedule a meeting with Lana Watts, Senior Director of Development & External Relations at least 12 weeks prior to your event if soliciting/fundraising from alumni or business partners.
- ✓ The Lana Watts and Karim Zelenka meet regularly with GSM alumni to learn about their career path experiences in the program and interests in connecting with the school. This is an opportunity for them to share information regarding your event including speaker and sponsorship opportunities.
- ✓ There are several advantages to partnering with the development team when soliciting alumni to participate in and/or sponsor your event
 - You have the GSM Development team as a resource
 - FAQ for Fundraising resources/policy
 - Monthly alumni e-news, *Accelerator*
 - GSM LinkedIn and Facebook pages
 - GSM Alumni Directory
 - Assistance with evite (sending to appropriate segments of alumni, based on location, event topic/relevance, etc.)
 - Opportunities to attend alumni association board meetings (held 3x year) and promote your event.

Auction Donation Plan

To create a fun event, some clubs incorporate auctions. They create a team of students charged with contacting specific businesses, alumni, and GSM business partners to ask for donated items, events or experiences that could be used as auction items. This is considered a fundraising endeavor and should be reviewed by the above GSM staff.

Payment & Finances (ASM Sponsorship)

Refer these questions to your student leadership organization or, for more complicated questions, contact Assistant Dean for Finance and Administration, [James Kelly](mailto:jtkell@ucdavis.edu) (jtkell@ucdavis.edu) or Director of Administration and Human Resources, [Michele Goodman](mailto:mlgoodman@ucdavis.edu) (mlgoodman@ucdavis.edu).

Club Funding for Smaller Events

Funding for smaller club events is requested through the leadership organization at the specific campus locations, ASM, Sacramento DSAC, San Ramon DSAC, GAC, and San Francisco DSAC. Examples of these events include a Halloween Party, Friendsgiving, Diwali, Lunar New Year, professional forums, and workshops.



INVITATIONS/RSVP

Event Registration

For online event registration portals, the GSM uses Eventbrite, Ticket Tailor, Brown Paper Tickets, and Aventri. Use Aventri or Ticket Tailor if you plan to collect money for your event. If you plan to **not collect money**, then you can use Eventbrite. If you have any questions regarding these tools, contact your program manager.

Basic Template for Invitations

Eventbrite

Description	 <div><p>oct 27</p><p>Dean's Reception in Southern California</p><p>by UC Davis Graduate School of Management</p><p>Free</p><p>REGISTER</p></div> <div><p>DESCRIPTION</p><p>Dean H. Rao Unnava invites you to join us for a premier Dean's Reception in Southern California. Meet with Dean Unnava, Senior Assistant Dean Jim Stevens, Senior Director of Admissions Kathy Gleed and Senior Director of Career Development Chris Dito on Thursday, October 27. Reconnect with your local Southern California GSM colleagues while helping admissions build the next class of MBAs.</p><p>Dean Unnava joined the Graduate School of Management in June following 32 years at The Ohio State University's Fisher College of Business, where he earned his Ph.D. and most recently served as the W. Arthur Cushman professor of marketing. Learn more at: http://gsm.ucdavis.edu/faculty/h-rao-unnava</p><p>Drinks and appetizers provided. Please feel free to invite a guest. RSVP requested by October 19.</p><p>DETAILS</p><p>6:00 p.m. - 6:30 p.m.: Exclusive reception for alumni to meet with Dean Unnava and GSM Senior Leadership</p><p>6:30 p.m. - 8:00 p.m.: Reception with Prospective Students and GSM Leadership</p></div> <div><p>DATE AND TIME</p><p>Thu, October 27, 2016 6:00 PM - 8:00 PM PDT Add to Calendar</p><p>LOCATION</p><p>Omni Los Angeles Hotel at California Plaza 251 S Olive St Crocker Room Los Angeles, CA 90012 View Map</p><p>FRIENDS WHO ARE GOING</p><p> Connect to Facebook</p></div>
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MailChimp Invitation

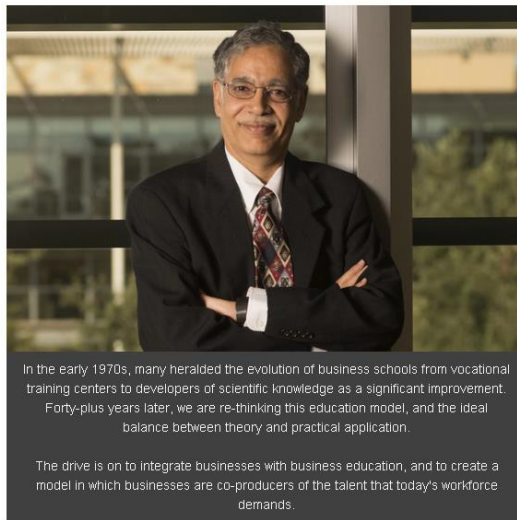
MailChimp is the school's main mass email platform of choice. We maintain all contact lists and opt-in/opt-outs through our main GSM MailChimp account.

If you plan an event and would like to reach segments of the GSM community (internal or external) with media-rich evites using our branded templates, please contact and consult with [Executive Director of Marketing and Communications Tim Akin](#), or [Director of Web Marketing Lisa Nguyen](#). They will consult internally on the event topic, the cadence/schedule of emails already in our queue and the best channels to reach audiences.

Join us for an exclusive Business Partner Networking Luncheon and meet

Dean H. Rao Unnava

and hear how he plans to better integrate business school education with the business community



In the early 1970s, many heralded the evolution of business schools from vocational training centers to developers of scientific knowledge as a significant improvement. Forty-plus years later, we are re-thinking this education model, and the ideal balance between theory and practical application.

The drive is on to integrate businesses with business education, and to create a model in which businesses are co-producers of the talent that today's workforce demands.

Thank you to GSM Business Partner and Luncheon Sponsor

Guest Lists

When considering a guest list, the following groups are maintained in MailChimp: current students from all six programs (Full-Time MBA, Sacramento MBA, Bay Area MBA, Online MBA, MPAc and MSBA), faculty, staff, alumni (all or by specific geographics), donors, business partners and friends of the School.

To reach out to GSM alumni, including the GSM Alumni Board, via email or other means, please contact Assistant Director Karim Zelenka with plenty of leadtime.

PROMOTION, MARKETING AND COMMUNICATION GUIDELINES

Posting information on club websites or any GSM website including the GSM web calendar, each club will need to work with the Marketing and Outreach representative that is on the student leadership organization for their program, e.g. ASM, GAC, or DSAC. The representative from the student leadership will then work with the Marketing Team, [Lisa Nguyen](mailto:lmwnguyen@ucdavis.edu), Director of Web Marketing (lmwnguyen@ucdavis.edu) or Executive Director, Marketing and Communications, [Tim Akin](mailto:tmakin@ucdavis.edu) (tmakin@ucdavis.edu).

After the event has a web presence on the GSM event calendar, send the URL to Development with a few lines explaining the event. Development will include your event and description in their quarterly *Top Ten Event* email that goes out to alumni.

For information on contacting current students, faculty and the Dean's Office, please contact your program manager regarding student newsletters or other avenues.

Events on GSM Web Calendar

All student events should have an event page on the GSM web calendar. Again, please send event specifics and any graphics/images to marcom@gsm.ucdavis.edu. Development will also consider your event and description in the *Top 10 Events* email sent periodically to alumni.

Places to Promote Your Event-Multi-Channel Marketing	
Publication	For Assistance Contact
Alumni Accelerator Newsletter	Director of Alumni Relations
Classroom or Virtual Classroom Announcements	Program Manager or the instructor of the course
Emails-GSM Group Lists	Program Manager
Face to Face	Student Leaders, GSMSA Board and Club Leaders
Flyers and Posters	Program Manager
Display Monitors at our Locations	Program Manager, EMS, Director of Web Marketing
GSM Social Media	Social Media Strategist Amy Davis
GSM Website	Student Leaders (Program Managers), Director of Web Marketing
Invitations & Save the Date (Email, slack, or Hard copy)	Student Leaders, Director of Web Marketing
On-Prem Pre-Class Slides and White Board Announcement	ASM and DSAC Leaders, Course Instructor, Program Managers
Student E-Newsletter	Program Manager
What's App	ASM and DSAC Leaders, Club Leaders
Program Event Facebook Page	ASM and DSAC Leaders,

Use of Official UC Davis and Graduate School of Management Logo Use

The GSM's official logo contains the UC DAVIS word mark, which is trademarked and property of UC Regents.

The GSM has been *deputized* to oversee the use of the GSM logo by student groups. To meet campus requirements, we have developed a “**GSM Affiliate Logo**” that can be used by official student groups.



If your club uses this logo on any separate club web site, **the following disclaimer must appear**. It can be discreet.

UC Davis makes no warranties, either expressed or implied, concerning the accuracy, completeness, reliability or suitability of the information contained on these Web pages or of the security or privacy of any information collected by these Web pages. All views expressed in this Web site are those of the author and not UCDavis. UC Davis logo used by permission.

These limitations are established, in part, due to risk management issues involving student club activities as well as a need to control the use of official Campus logo, its trademark, and the brand value that extend from them.

Obtaining the GSM Affiliate Logo

Please visit the GSM Marketing Toolbox and click on the “Logos” tile:

<https://gsm.ucdavis.edu/intranet/marketing-toolbox> Download from Box the Affiliate Logo Folder zip file and extract to obtain the logos in various formats: jpg, eps, png. If you need assistance with these logos, please contact Executive Director of Marketing and Communications Tim Akin

PLEASE DO NOT ALTER OFFICIAL CAMPUS LOGOS OR INSIGNIA.

UC Davis Name and Trademarks

All variances of names and visual representations of the University of California, Davis, are considered UC Davis trademarks.

The marks include any trademark, service mark, name, logo, insignia, seal, design, or other symbol or device associated with or referring to UC Davis. Also included are any words, phrase, or image that implies association with the University, such as “Cal

Aggie” or “Go Ags!” The University owns and licenses these trademarks and must approve their use.

Rules to Follow

1. Groups are not permitted to use the UC or University of California, Davis seal or “Cal Aggie” logo
2. Student organizations may use the University name (including any abbreviation) only to describe its location, but not as part of its name. Example: “Social Club at UC Davis” is permitted, but “UC Davis Social Club” is not permitted. Examples of proper use: Davis Net Impact, Wine Consulting Group at UC Davis

Student organizations may use the term “Aggie” as part of a name, but not “Cal Aggie.” Example: “Aggie Cultural Association” is permitted, but “Cal Aggie Cultural Association” is not permitted. If the name of your group is the same as, or very similar to, that of another group (campus or off campus), then you must clearly differentiate your group’s name. Terms that may help you differentiate your name include “at UC Davis” or “Campus Chapter of.” Examples: Campus NOW, Campus Chapter of Girl Scouts

GSM Marketing Toolbox

Please visit our web Marketing Toolbox for tools and resources to help tell your story.

<https://gsm.ucdavis.edu/intranet/marketing-toolbox>

You’ll find customizable GSM-branded Zoom backgrounds, logos, campus colors, information about photography and videography services, social media, campus brand guidelines, and more

APPENDIX

Event Timetable for Students

The best practice is to determine the date of your event first and then work backwards entering specific dates on a timeline table or grid. You can use the following table as a *guideline* to help you determine the dates of when tasks need to get accomplished. Just fill in the “Date” fields according to your specific event needs.

EVENT PLANNING TIME-TABLE FOR ON-PREM LARGE EVENTS		
Time Frame	Date	Task
12-10 months pre-event	TBD	Conceptualize/Envision your event: purpose and objective, theme, fun activities, workshop, casual, formal etc.
12–8 months pre-pre-event start date	TBD	Choose a venue and set-up contracts as soon as your event type has been determined. Reserve it and start working with the venue on all logistics
6-4 months pre-event	TBD	Complete the major programming—schedule speakers, workshop leads, auctioneers , etc.
5-4 months pre- event	TBD	Start developing all project plans, marketing collateral , flyers, invitations, and web designs to be ready to go public 4-3 months prior to beginning of event.
5-4 months pre-event	TBD	Send examples of marketing collateral to Tim Akin for feedback
4 months pre-event	TBD	Start the process of soliciting sponsorships for your event
3-2 months pre-event	TBD	Event announcement to the community and through other GSM channels
3-2 months pre-event start date. (or as soon as venue and theme is finalized)	TBD	Add event to EMS calendar to reserve rooms in Gallagher Hall if applicable.
3-2 months pre- event	TBD	Set-up online registration for the event or have invitations ready to be sent ¹
3 months pre- event	TBD	Promote your event on the GSM website, add to the web event calendar. You can add tentative information at this point and continue to update as planning continues
2 months pre-event		Save the date email sent out
2-1 months pre-event	TBD	Submit alcohol permit if event is being held on campus
2 months pre-event	TBD	Order catering with expected number of attendees (this can be updated and changed one week pre-event depending on the vendor)
2 months pre- event	TBD	Draft email invitation to event—MailChimp

¹ Create an early bird incentive discount that is scheduled to end one month pre- event starting.

EVENT PLANNING TIME-TABLE FOR ON-PREM LARGE EVENTS		
Time Frame	Date	Task
6 wks. pre-event	TBD	If applicable, print or send invitations if using bulk mailings for mailing—US mail
2 wks. pre-event	TBD	Send first e-reminder with rsvp information for those who have NOT responded yes or no
3 days pre-event	TBD	Send email reminder to attend the event to those who responded they would be attending
3 days pre-event	TBD	Send RSVP list with donor names included to Development and External Affairs
2 days pre-event	TBD	Gather items needed for event and get everything ready to be transported to venue
Day of Event	TBD	Yay!! You made this happen!
Immediately following event	TBD	Clean-up Venue (if GSM venue) and remove all your equipment. If in GSM facility, empty trash and recycle. Wipe down tables and remove all equipment. Leave space exactly as you found it.
1 wk. post event	TBD	Send thank you emails or cards to guest speakers
2 wk. post event	TBD	Track and organize all expenses and receipts and submit to the ASM, Sacramento or Bay Area DSAC

EVENT LOGISTICS AND PLANNING TABLE

You may use the following tables as a template to plan your event. Contact your program manager for any additional resources or suggestions.

NAME OF EVENT DATE PLANNING

EVENT SUMMARY	
Event Name	
Date	
Time	
Location	
Account #:	
Registration Url:	
Invitation drop date and RSVP Deadline:	

BUDGET INFORMATION	
Spending Budget	
Actual Costs	

ON-PREM EVENT PLANNING TEAM	
Event Planner/Lead	
Assistant Coordinator	
Facility Manager	
Facilitator	
Translators	
Technical Support Lead	
Other Event Staff	

VIRTUAL EVENT PRODUCTION TEAM	
Host	
Co-Hosts	
Waiting Room Manager	
Chat Manager	
Breakout Room Manager	
Question and Answer Manager	
PowerPoint Advancement	

Invitations	
Communication (Mail chimp, email, GSM Website)	
Invitation Content	
Event Description	
What will be served	
Logistical Details	
Date & Time	
Location	
Ability to add to calendar	

FINAL OVERALL ATTENDANCE

# Invited	# RSVP	# No Show	# Show w/o RSVP	Total # Attended	% Drop Rate

EVENT CONTRACTORS			
CONTRACTOR NAME:			
Service	Terms	Date Finalized	Point Person
Contracts Created			
Agreements Confirmed			
Contractor NAME:			
Service	Terms	Date Finalized	Point Person
Contracts Created			
Agreements Confirmed with Business Office			

EVENT REGISTRATION	
Point Person:	
Task	Date Completed:
Eventbrite/Aventri set up?	
Evite draft sent to Tim Akin and Lana Watts?	
Evite drop date:	
Evite Reminder to Register drop date:	
RSVP list from registrations sent to Lana Watts (3 days prior)	
Update RSVPs in AIS?	
Send RSVP list to Lana Watts (3 days prior)	
Update AIS with final participants (post event)?	
Finalize event summary (share with program managers and Lana Watts)	

MARKETING	
Point Person:	
Task	Date Completed:
Create Web page (Reviewed by Tim Akin)	
Add to Calendars (Student Affairs and Development)	
Add to GSM Web Calendar	
Add to EMS (room reservations)	
Add to Dean's Calendar	
Create Web page	
Send info to Student E-News (all programs)	
Send info to Alumni news	
Posted on Twitter	
Posted on Facebook	
Other Social Media	
Guest List Servs: Community, Faculty etc. (see Group Distribution Lists)	

VENDORS/SERVICES			
Service	Vendor	Cost Estimate	Actual Cost
Print Program			
Facility Rental			
Rental/Reserved			
Catering			
Transportation			
Audio Visual			
Photographer			
Other Equipment			

RESERVATIONS				
Type	Start Date	End Date	Confirmation #	Cost
Venue1:				
Venue 2:				
Hotel Room block				

EVENT AGENDA/SCHEDULE PROGRAMMING

Schedule for Program Booklet

Date	Time	Programming	Speaker, Title

EVENT SPEAKERS

SPEAKER NAME:		POINT PERSON:	
Presentation Title			
Bio received			
Photo received			
Instructional Materials Received/handouts			
AV Needs			
Permission to record presentation			
Arrival Time			
Parking Pass and Directions Mailed			
Other Needs			
Hotel Reservations			
Speaker Gift			
Thank you letter sent:			
SPEAKER NAME: <i>Name of Speaker</i>		POINT PERSON: <i>Designated Staff</i>	
Presentation Title			
Bio received			

Photo received	
Instructional Materials Received/handouts	
AV Needs	
Permission to record presentation	
Arrival Time	
Parking Pass and Directions Mailed	
Other Needs	
Hotel Reservations	
Speaker Gift	
Thank you letter sent:	

VENUE SET-UP	
Venue	
Room	
Reservation Date	
Venue Coordinator (VC)	
VC Email	
VC Office Phone	
VC Cell/Emergency #	
Set up time	
Prog. Start Time	
Breakdown Time	
Confirmation#	
Estimated cost	
Other details	
ROOM STYLE	
Number of people	
Number per table	
Number of Tables	
Set-up Style:	
<i>Theater/Lecture</i>	
<i>Banquet Rounds (Full Circle or Partial Circle)</i>	
<i>Highboy/Cocktail Tables</i>	
<i>Other Setup</i>	
<i>Food/Beverage Station</i>	
Check-in table	
<i>Other Set-up Needs</i>	
ROOM STYLE	
Unlock Doors	
Additional Custodial Svc	
Music	
Entertainment	
Decorations/Ctr Pieces	
Video Taping	
Photography	

Rentals	
Printed Materials	
Reserved Parking	
Trash Cans	
Altered Watering	
Permits	
Cal Aggie Hosts	
Giveaways	
Ticket Info:	

ADDITIONAL ITEMS		
ITEMS	Descriptions	Point Person
Directional Signs		
Additional Furniture GSM Lectern Sash Other GSM Signage		
UCD Special Services Move Furniture Ordered Estimated Cost Cost Additional Information		
Music during event		

CATERING	
Meal-Type (Breakfast, Lunch, Dinner)	
Company Contact name Email Phone Cell/Emergency # Arrival time Service Time Estimated cost Equipment ordered	
Menu	
Type of service	
Multiple menu options	
Special dietary requests	
Serviceware	
Linen color/napkin color	
Centerpiece Flowers-colors Candles Other	
Bar Hosted/Cash	

RENTALS		
ITEM	DESCRIPTION	POINT PERSON
Equipment		
Company Contact name Email Phone Cell/Emergency # Arrival Date Arrival time Retrieval Date Retrieval Time Date Ordered Date Confirmed Estimated cost Actual Cost Other details		Notes:
Quantity		
Cost		
Total		

AV EQUIPMENT	
AV Needs: Microphones Laptop Projector Screen VCR/DVD player Video Conferencing Video Taping Other	
Technical Staff Contact name Email Phone Cell/Emergency # Arrival time Estimated cost Date Ordered Date Confirmed Equipment ordered Other details	

PHOTOGRAPHY		
TYPE	DESCRIPTION	POINT PERSON
Photographer		
Special Photos		
Company		
Contact name/responsible		
Email		
Phone		
Cell/Emergency #		
Arrival time		
Estimated cost		
Date Ordered		
Date Confirmed		
Equipment ordered		
Other details		

PERMITS		
ITEM	DESCRIPTION	POINT PERSON
Parking Permits		
Guest Speakers		
Attendees		
Date Obtained		
Fire permit		
Date submitted		
Date approved		
Alcohol permit		
Date submitted		
Date approved		
Sound permit		
Date submitted		
Date approved		

ADDITIONAL MATERIALS

Event Schedule/Program	
Name Tags	
Award Certificates	
Menu Cards	
Place Cards	
Evaluations	

GUEST GIVEAWAYS/PRIZES

Giveaway Item Quantity Vendor Item Description Company Item # Color Imprint/Logo to use Date ordered Date Needed Estimated Item Cost Final Cost	
Prizes Needed Item Qty Cost	

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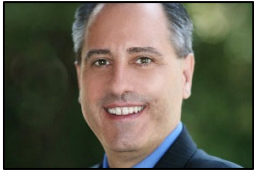


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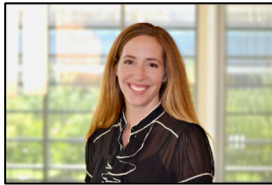
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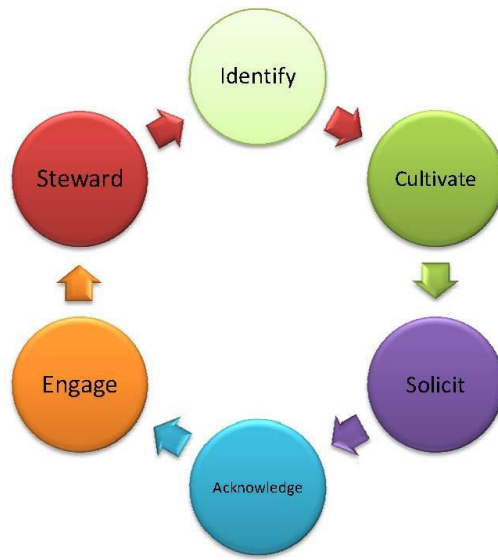
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APPENDIX 1: ASKING FOR MONEY: Only one step of many in fundraising



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Fundraising Terms:

Identification: create a list of potential donors/companies

Cultivation is getting to know your prospective donors and letting them get to know your club/organization.

Solicitation is when you ask for money. *This is the one piece of the process that is sometimes mistakenly seen as the whole.*

Acknowledgement is when you thank and acknowledge donors for their gifts.

This includes sending thank you letters, including gift acknowledgements, in your annual report or newsletter. Let donors know how you spent their money and stay in touch with them through the year (not just when it is time to ask again).

Engagement brings your donors closer into the life of your club/organization and what you are trying to accomplish. Many donors can give more than money.

They can give their time, provide technical expertise, help secure resources and services at reduced prices or advocate on your behalf.

Stewardship keeps you in relationship with your donors. You think about them at times other than when you are in need of money. You invite them to events, keep them updated on your organization's programs, successes and challenges, introduce them to new club officers, let them know what the club is doing this year. As you can see, fundraising is just one part of development. Don't try to save money or time by treating donors as an ATM machine. Remember to focus on all the steps in the development process. TAKE A LONG TERM VIEW!

STUDENT FUNDRAISING GUIDELINES

The GSMSA is a tax-exempt organization and is therefore, able to issue tax receipts for donations. The thank you letter from the student organization should include tax language. This is based on the fact that the organization is a 501c3 (non-profit status) and that it has autonomy regarding how it uses any money raised for the benefit of the organization.

In soliciting gifts, student organizations must not act as a representative of the University – the name of the University can be used only to identify the location of the group.

While you are not raising funds for the GSM or UC Davis (unless the funds are going to the student activities fund), please do remember that you are ultimately representing the campus. It is important to ensure anyone in contact with potential donors upholds the professional and courteous reputation of the university.

Also, you are asked not to contact GSM Business Partners or Dean's Advisory Council members. Please contact Lana Watts to discuss your interest in contacting these or other groups.

Before approaching alumni, please contact the director of alumni relations.

For tracking purposes, you are expected to notify Lana Watts or the director of alumni relations of donations received so that the GSM can continue to thank these people for their on-going support and so that we do not over-ask any one group or individual.

There are times where a student group has solicited a donation and the donor requests/requires a receipt. Again, please immediately speak with Lana Watts or the director of alumni relations so we can assist you in this process.

APPENDIX II: Tips for Club Fundraising and Event Planning & Implementation (written by a former ASM President)

How can a group with constantly changing members create a reliable fundraising stream?

- Ensure early hand-over/induction of new members/officers/volunteers
 - Involve incoming members/students as early as possible and work together on projects to ensure knowledge from past years lives on within the club
- Create/maintain guidelines/records/history or best practices of fund-raising activity in the past so that new members do not have to “recreate the wheel”—be sure to keep adequate records of donations and donors.
- Maintain records of past club/committee members so that future sponsorships/donations can be solicited from these people—they are likely to be willing to donate if they can.
- Incorporate local membership dues if not already in place (in addition to national chapter dues). Ensure that general accounting practices are applied.

What elements have we seen in successful events?

- Location/ambiance
- Using an interesting, relevant speaker, film, or other attraction
- Understand your audience
- Timing/Planning-create a timeline starting with the event date and working backwards: understand and avoid date conflicts (other events, exams, midterms, holiday weekends, etc.—consider leveraging on an existing event or holiday as an option to save money, and pool resources). Don't forget logistics:
 - Recycling bins on-hand
 - Traffic flow for event/set up of venue
 - Invitations/save the date sent well in advance, at least 4-6 weeks
- Special lighting/special effects: candles are cheap, so are white Xmas light strings... cloth can be cheap, consider draping possibilities (and recycle/store for future events)
- Donation of food/drink— or decorations/giveaways/etc.
- Food is a very variable cost! Think simple
- Some facilities have basic/standard decorations or equipment that can be used free of charge, be sure to ask when booking a facility
- Music—adds a great deal to atmosphere—can be as simple as a member bringing in a portable player...or bringing in CDs to play on facility sound
- Make sure your event objective is clearly defined...Why are you doing this? What are you hoping to achieve? Make sure planning supports the overall objective --- ensure budget, staffing, etc. are all in line

- Evaluate events: post-mortems--- brainstorm on how it could be better next time, learn from mistakes (and successes!) and record that information so the next event builds upon the success of the last one.

Describe the “mindset” of a fundraiser.

- Always looking for connections—find ways to involve or engage the greater community—includes ensuring recognition and thanks for those who help with time and/or money
- Building relationships is what we do—“friend raiser”
- Listening skills are important; listen to understand how to better engage fundraisers
- THANK YOU, THANK YOU, THANK YOU: NEVER forget to follow up every gift/sponsorship/etc. with a formal thank you: a letter, email, a phone call--- make sure each and every donor is thanked in a timely manner. This is paramount in fund-raising!
- Think more about an ongoing relationship with donors rather than just for your one year of raising money at the GSM.

How does one go about setting up an effective corporate or individual sponsorship solicitation?

- Have a well-thought-out plan/strategy for what you are trying to achieve. Build confidence amongst your corporate friends in your club chapter leadership
A compelling pitch/executive summary. What are you trying to achieve? Why are you asking for sponsorship? How will support help achieve your goals? What does the corporate sponsor get out of it (signage, recognition at event(s)? Special invitations, or a number of complimentary invitations, etc.?)
- Consider approaching corporate partners whose interests fit with your chapter, have an affinity for your club values: consider your target audience and what you are “selling”
- Ensure thanks/recognition is accomplished ... be professional and take your corporate sponsors seriously--returning sponsors are ultimately what you would like to cultivate
- Consider your community of corporate donors (who are your prospects)
 - Local companies in the area
 - National companies that you, your club, or your fellow classmates have some sort of connection to
 - Speak to your campus development officers- they may have suggestions/ideas: make sure you are coordinating efforts with them in advance
 - Read local/national newspapers—understand who is involved in these kinds of activities

- Where do you have alumni? Look at the alumni online directory, the LinkedIn Alumni Feature and coordinate with Karim and Lana who work with alumni.
- PLEASE, before contacting any GSM donors or volunteers, discuss your interest with Lana Watts in advance. Once you begin fundraising, keep records of interactions with alumni and others and share with GSM Development Office for continuity.

Logistics of corporate sponsorship

- All letters should be formal and always address your letter to a named person phone up the company and ask who deals with sponsorship/marketing
- Show what you can offer the sponsor in return for their investment. Focus on sponsor recognition, alumni connections, and interactions with students. If there is an incentive that has value, you will have to discount their donation by the “fair market value” they will receive from a ticket or other incentive.
- Always give a figure of how much sponsorship is required and what it is used for - state who benefits
- Initial letters should be no more than one-page long
- A more detailed breakdown of your proposal should be available on request. This should include: a detailed CV of your own or your organizations RELEVANT history and achievements; a comprehensive breakdown of all the costs and full details of what you can offer any potential sponsor
- Speak to the GSM Marketing and Communications director to see how you can contact your local papers/radio stations and ask for help in publicizing your case. The local paper could print an open letter to potential sponsors. Ensure you are following UC Davis policy for fund-raising when doing this!
- Find possible sponsors through Yellow Pages and your local Chamber of Commerce.
- If any of your fellow clubs/organization on campus have found a sponsor, ask them for help and advice on how to attract funding
- Ask the advice of a local businessperson: they could help point you to a local company who may be interested, or to an individual who supports your cause
- Target companies with a history of sponsorship and/or ties with your mission (also consider their competitors)
- Have one person coordinating all sponsorship proposals - this person should be available on the phone during working hours or via email
- Always follow up your initial contact, either by letter or preferably by phone. Even if the response is negative, you should still thank them for their time... they may become a sponsor in the future.
- Perseverance is likely to be the key

How do you “get in the door” with an organization if you don’t know anyone there?

- Look for marketing/PR contacts or community service contacts on their website, annual report, etc.- also do Google searches on the company, look at checking press releases for contact information of a specific person. Once inside, it is easier to navigate and find the person you should be talking with.
- Check to see if your faculty advisor or any other contacts you might have on campus know anyone within the organization you are trying to approach

What does one do to keep up morale in the face of a string of “no’s”?

- Understand, just as in business, that you need a pipeline: for every yes, there are 7-10 no’s...you can’t take that personally
- Help each other... keep your teammates (fellow committee members, other chapter chums, whoever-) informed of both your successes and frustrations...support each other, prop up morale.

Cheap “wow”s: the shoestring budget

- Host a meeting outdoors at sunset instead of in a ballroom/classroom
- Use of private homes (your faculty sponsor, perhaps?)