New Student Leader Resources

April 2022

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STUDENT LEADER WELCOME AND OVERVIEW

The GSM staff and Deans welcome you to the GSMSA and DSAC (Business Analytics). Congratulations on becoming a GSMSA, DSAC and club leaders and thank you for your service. We look forward to seeing you grow as leaders and partnering with you in your leadership endeavors.

GSMSA Brief History

The GSMSA was established during the 2017-2018 school year to provide student governments at each program location with better opportunities for collaboration and information sharing across programs.

GSMSA and Club Leader Expectations

The GSMSA, DSAC and club leaders represent the Graduate School of Management and the UC Davis community. This includes GSM Students, Staff, Faculty and other *stake holders* including Alumni, Donors and GSM friends. As student leaders you are also **stewards** of the GSMSA and club resources. It is expected that these resources are cared for and passed-on to the next generation of leaders. In this capacity it is expected that each individual leader will embody the following characteristics:

1.)Integrity
2.)Transparency
3.)Follow through
4.)Honesty

We also expect all GSMSA leaders to be familiar with the 4 Collaborative Leadership Pillars. Please review them here:

It is important to be the best that you can be and represent each other and the GSM community well currently and into the future. Each of you have a legacy.

Showcasing the GSM Student Body
The GSM student body is a vibrant and dynamic community. One way to showcase these characteristics is through student social events.

Therefore, the *New Student Leader Handbook* is a guide for GSMSA and DSAC members and club leaders who are planning social events and managing finances for each location (for timetable, event planning templates and a list of staff members, please see Appendix 1 at the end of this document).

FUNDING

The GSMSA at each campus is provided funding by the GSM Administration through the *Big Ask* process. The funds that are requested will be used to deliver social events to the community.

The ASM/GSMSA is the leadership body that has the 501c3 designation and is ultimately responsible for reporting how the funding is utilized at each location. As of 2022 each program has their own bank account. However, it is the ASM/GSMSA's responsibility to track the funding at each location and report that information back to the GSM administration.

All *Big Ask* funding requests for the following year will be submitted to the GSM administration no later than the end of July, previous to the year the events will take place. For instance, if planning events for the 2022-2023 school year, then the funding requests must be submitted by the end of July 2022.

Traditionally *Big Ask* supports major social events like the Signature Events, GSM Olympics and events specified by the GSMSA. Other events, like club events, workshops, and speaker series, *Diwali, Lunar New Year*, and workshops may be funded through club dues or by donation. **Note:** In recent years, the ASM has included Diwali and Lunar New Year in their Big Ask request.

Once funding is requested, the planning can commence!

GSM Funding for MBA Programs—Tracking and Responsibility

Yearly funding for student-organized events is obtained from the GSM Administration and is distributed to the Full-Time ASM/GSMSA. At that point, the ASM will distribute the funding to Sac GSMSA, and Bay Area GSMSA. Funds are obtained when students submit their financial requests to Assistant Dean of Student Affairs, Valerie James, otherwise known as, ***The Big Ask***.

Online GSMSA will receive separate funding from the Assistant Dean for Finance and Administration, James Kelly.

Full-Time ASM/GSMSA, Sac GSMSA, and Bay GSMSA are responsible for budgeting individual accounts and tracking all expenditures. This information is submitted to the **Director of Finance of the ASM/GSMSA** to be included into an end of the year reporting.

How to Track Funding

In accepting funds from the GSM, each program agrees to provide the following:

- An end of the year Financial Report that is submitted by the ASM/GSMSA Director of Finance in **June.** This report will include all MBA and MPAc Programming Expenditures, Incomes, Balances, and Detailed Budget. In addition, the ASM/GSMSA Director of Finance will submit all their tax reporting documents.

- Once the end of the year report is submitted, then each program should request funding, *The Big Ask*, for the following year in July. It takes about 2-6 weeks for the decision to be made and the check to be cut for each program.

The Big Ask

Each leadership organization from the MBA programs that need event funding will submit a budget for the following year given the events they plan to execute.

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 individual GSMSA and could include Diwali, Lunar New Year):

During the 2018-2019 the GSM increased the *Big Ask* budget by 21%.

During the 2021-2022 year the GSM increased the budget by 27%.

Funding for Smaller Club Events

Each club may request funding through the leadership organization for their specific program, Full-Time ASM/GSMSA, Sacramento GSMSA, Bay GSMSA, GAC GSMSA, and San Francisco DSAC. Examples of these events include a Halloween Party, Friendsgiving, WiL events, Finance workshops, and other professional forums.

GSM Funding Through 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** *(see Appendix 1 at the end of this document for methods for fundraising)*.

Prior to doing any fundraising for a **501c3**, please contact development@gsm.ucdavis.edu to discuss your ideas at least **12 weeks prior to your** event.

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

We recommend that you create a **sponsorship packet** that includes giving levels. Avoid offering "incentives" that have what is considered "Fair Market Value" i.e. offering free "stuff" or tickets (unless they are free) in exchangefor 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

✓ The Development and Alumni Relations team meet regularly with GSM alumni to learn more about them, their time at the GSM, and to update them on the School. They ask alumni how they would like to engage with the school through volunteering, attending events, helping place students in positions, referring prospective students to the GSM and giving back philanthropically. 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 and Alumni Relations team when soliciting alumni to participate in and/or sponsor your event.

   o You have the GSM Development team as a resource
      ▪ FAQ for Fundraising resources/policy
      ▪ Monthly alumni e-news, *Accelerator*
      ▪ 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

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.

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, provide them with a gift or small token of appreciation. Small items may be purchased from the UC Davis bookstore for this purpose. You may also email development@gsm.ucdavis.edu to see if there are swag items available.

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 auctionitems. This is considered a fundraising endeavor and should be reviewed by the aboveGSM staff.

PLANNING EVENTS
Conceptualize and Envision
- Who is on the event planning team? Assign tasks:
  - 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 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 development@gsm.ucdavis.edu at least 12 weeks prior to your event. Our Development Team 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 our Development team know so they can quantify engagement for the school.

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

Remember to consider the following:
- ✓ Class schedules (review EMS bookings)
- ✓ Other events/activities (workshops, IMP schedules, finals)
- ✓ Holidays, including religious holidays. See UC Davis Multicultural calendar.
- ✓ Scheduling Conflicts and Scheduling Complements (for instance, when are most people available in one location. Are there other events happening at the same time? Are there any events that you can piggy-back?)
- ✓ Venue and speaker availability

Risk Management Insurance for your Club Event

Off-campus GSM events are only covered by insurance if the event is UC Sponsoredand UC Supervised. Off campus club events are not covered by campus insurance, but in many cases the contracted venue will offer event insurance or will suggest insurance vendors.

Securing a Venue on the UC Operated Campuses

Events in Gallagher Hall (Full-Time Program Facility) or Bishop Ranch Facilities (Bay Area Program Facility)

Utilize the *Event Management System (EMS)* to secure a space. Work with your program manager first, about reserving a space if you need assistance.

- Gallagher Hall contact: Full-Time Assistant Director and Program Manager, Jacqueline Romo.

- Bishop Ranch contacts: Bay Area MBA Program Manager, Sayana Saing (ssaing@ucdavis.edu)

   Bay Area MBA Instructional Operations Manager, Sergio Esquerre (sdesquerre@ucdavis.edu) about this reservation.

UC Davis Medical Center (Sacramento Campus)

Reserving a space at the UC Davis Medical Center, contact the Sacramento MBA Program Manager, Jason Choi (jwcchoi@ucdavis.edu) and the Sacramento MBA Instructional Operations Manager, Dedan Sims (sims@ucdavis.edu).

UC Hastings (San Francisco)-MSBA

Reserving a space at the UC Hastings facility, contact the Associate Director for the Master of Science in Business Analytics, Shachi Govil or the Admissions and Operations Specialist, Camille Mack, msba.admissions@gsm.ucdavis.edu.

UC Davis

Reserving a space at a UC Davis main campus venue, go to **Conference and Event Services.**

Securing a Venue Off-Campus

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.

Work with the event planner for the venue and ensure that the club has an **official contract** with the venue.

- ✓ 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).

Zoom Event

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. All UC Davis students have a licensed zoom account at no cost. Here is more information regarding the UCD licensed zoom account.

Audio Visual Needs On-Prem

Consider your presenters' AV needs so you and the venue know how to set-up.
If hosting an event in any of the GSM spaces, work with your program manager to develop audio visual solutions.

- ✓ 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 Zoom

Consider your presenter's needs and how you want the audience to participate in thevirtual event. Organize a production team well in advance of the event and assign tasks to each member like, managing the waiting room, chat feature, the presentation, videos, the annotation tool, and the live question and answer sessions. 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 of your zoom event so you have time to fix any issues ahead of time.

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. If the event is off campus, then hire a caterer of your choice, but be mindful of any venue 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 , Section 12: Alcohol and Drugs.

Alcohol Service on UC Davis Campus

You must fill out alcohol permit from CEVS website a month before your event if youplan to serve alcohol. See the Guidelines.

See Also: Online permit. Permit flow-chart

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 They also provide special services for events. Call them at (**530)-752- 2677**. You should set this upat 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 Charla Kordana (cjkordana@ucdavis.edu)

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	
Logistical Details	
Food Served	
Date and Time	
Location	

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. He 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 development@gsm.ucdavis.edu with plenty of leadtime.

PROMOTION, MARKETING AND COMMUNICATION GUIDELINES

Our team looks forward to collaborating with you on promoting your events, activities, and noteworthy accomplishments to share with the GSM community--and beyond

Your voices and perspectives are also key to sharing with prospective students considering GSM programs. Your blogs, video, photos and other contributions are the cornerstone of our marketing outreach efforts to bring the best and brightest students to UC Davis.

Club Websites and GSM Web Calendar

To post information on club websites, the 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 GSMSA-SAC, GSMSA-BAY, GSMSA-Online.

The representative will then work with the GSM Marketing and Communications Team who can be reached at marcom@gsm.ucdavis.edu. The Executive Director of Marketing and Communications is Tim Akin (tmakin@ucdavis.edu).

Brand Communications Guides for Students

UC Davis Brand Guide

UC Davis Colors

UC Davis Fonts

GSM & UCDavis Logos

Top Priority: Student Events on GSM Web Calendar

If you are planning a student event and have the basic information, including the date, a brief description, imagery that meets UC Davis brand standards and RSVP (if applicable), please prioritize to have your event posted on the GSM web calendar.

Prospective students often view our calendar to check out admissions events but also the interesting variety of of schoolwide events that give a sense of our community. We appreciate it! Again, please send event specifics and any graphics/images to marcom@gsm.ucdavis.edu

Development & Alumni Relations 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 (monthly)	Director of Alumni Relations (to be filled), Exec Director of Development
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, Executive Director of Marcom
Display Monitors in GH Foyer, Student Lounge, Bishop Ranch	Program Manager, EMS, Director of Web Marketing marcom@gsm.ucdavis.edu
GSM Social Media (Instagram, Twitter, Facebook, LinkedIn) - photos, video clips, Stories, etc.	Social Media Strategist Amy Davis amydavis@ucdavis.edu
GSM Web Calendar	Student Leaders (Program Managers), Director of Web Marketing marcom@gsm.ucdavis.edu
Invitations & Save the Date (Email, Slack Post, or Hard Copy)	Student Leaders, Director of Web Marketing marcom@gsm.ucdavis.edu
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,
And last but not least . . . Blogs by you! We encourage a cross section of voices from our diverse community to blog about your experiences. Contact us!	Content Editor/Writer Steven Wilson sjwilson@ucdavis.edu

GSM Marketing Toolbox
Please visit our web [Marketing Toolbox](#) for tools and resources to help tell your story.

You'll find customizable GSM-branded Zoom backgrounds, downloadable GSM Affiliate logos, links to campus colors, information about photography and videography services, social media, campus brandguidelines and much more!

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 GSM student groups.To meet campus guidelines, we have developed a "**GSM Affiliate Logo"** that can be used by official student groups/clubs/organizations.

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 theaccuracy, completeness, reliability or suitability of the information containedon these Web pages or of the security or privacy of any information collectedby these Web pages. All views expressed in this Web site are those of the author and not UC Davis. 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. Ifyou need assistance with these logos, please contact

Executive Director of Marketing and Communications Tim Akin

<p style="color:red; text-align:center">PLEASE DO NOT ALTER OFFICIAL CAMPUS LOGOS OR INSIGNIA</p>

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 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 atUC 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, CampusChapter of Girl Scout.

<p style="text-align:center">Thank you!</p>

APPENDICES

Appendix 1: There is a Method on How to Ask for Money

Asking For Money: Only One Step of Many in Fundraising
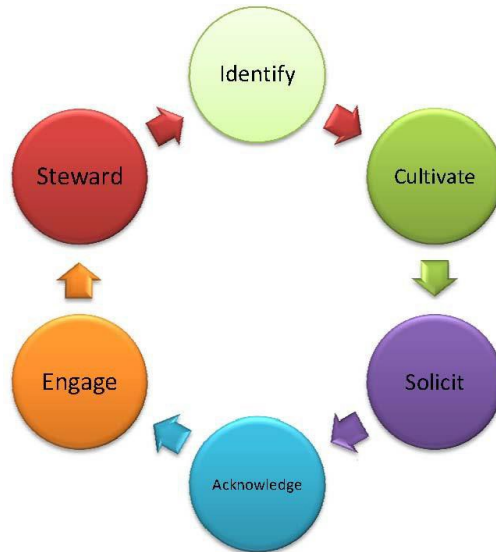
Copyright 2009 – Mel and Pearl Shaw

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!

Money 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 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 development@gsm.ucdavis.edu to discuss your interest in contacting these or other groups.

Before approaching alumni, please contact development@gsm.ucdavis.edu.

For tracking purposes, you are expected to notify development@gsm.ucdavis.edu 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 contact development@gsm.ucdavis.edu so we can assist you in this process.

Appendix 2: 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

  o Involve incoming members/students as early as possible and work togetheron projects to ensure knowledge from past years lives on within the club.

- Create/maintain guidelines/records/history or best practices of fund-raising activityin 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 anoption to save money, and pool resources). Don't forget logistics:
  o Recycling bins on-hand
  o Traffic flow for event/set up of venue
  o 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 forfuture 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 usedfree of charge, be sure to ask when booking a facility
- Music—adds a great deal to atmosphere—can be as simple as a memberbringing 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? Whatare 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 withtime and/or money
- Building relationships is what we do—"friend raiser"
- Listening skills are important; listen to understand how to better engagefundraisers
- 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---makesure 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 yourone 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. Buildconfidence amongst your corporate friends in your club chapter leadership

    A compelling pitch/executive summary. What are you trying to achieve? Whyare 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 youare "selling"
- Ensure thanks/recognition is accomplished … be professional and take your corporate sponsors seriously--returning sponsors are ultimately what you wouldlike 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 the Development team who work with alumni (development@gsm.ucdavis.edu)

- PLEASE, before contacting any GSM donors or volunteers, discuss your interestwith development@gsm.ucdavis.edu 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 personphone 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 "fairmarket 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. Thisshould 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 ofCommerce.

- If any of your fellow clubs/organization on campus have found a sponsor, askthem for help and advice on how to attract funding

- Ask the advice of a local businessperson: they could help point you to a localcompany 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 beavailable on the phone during working hours or via email

- Always follow up your initial contact, either by letter or preferably by phone. Evenif 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 oncampus 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 are7-10 no's…you can't take that personally
- Help each other… keep your teammates (fellow committee members, otherchapter 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?)

Appendix 3: Event Planning

Timetable for Students

The best practice for planning is to determine the date of your event first and then work backward. Use the following table as guide to determine the due dates for tasks.

EVENT PLANNING TIME-TABLE FOR LARGE EVENTS		
Time Frame	**Date**	**Task**
12-8 months pre-event	TBD	***Conceptualize/Envision*** your event: purpose and objective, theme, fun activities, workshop, casual, formal etc.
	TBD	***Create an Event Budget*** determine how much do you have to spend for this event and what are your sources of funding
	TBD	Choose a venue and set-up **contracts** as soon as your event type has been determined. Reserve it andstart 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.
	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 start date. (**or as soon as venue and theme is finalized**)	TBD	Event announcement to the community and throughother GSM channels
	TBD	Add event to EMS calendar to reserve rooms in Gallagher Hall if applicable.
	TBD	Set-up online **registration** for the event or have invitations ready to be sent[1]
	TBD	**Promote** your event on the GSM website, add to theweb event calendar. You can add tentative information at this point and continue to update asplanning continues
2 months pre-event	TBD	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 EVENT ANNOUNCEMENTS		
Time Frame	**Date**	**Task**
6 wks. pre-event	TBD	Send invitations
2 wks. pre-event	TBD	Send first 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 GSMSA

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 EVENTDATE 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	

ZOOM 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: (NAME HERE)			
Service	Terms	Date Finalized	Point Person
Contracts Created			
Agreements Confirmed			

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

Point Person:

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

RESERVATIONS

Point Person:

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:	

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:	
Theater/Lecture	
Banquet Rounds (Full Circle or Partial Circle)	
Highboy/Cocktail Tables	
Other Setup	
Food/Beverage Station	
Check-in table	
Other Set-up Needs	

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	

Appendix 4: Staff Resources Contacts

STUDENT AFFAIRS

|		
Jason Choi **Program Manager** Sacramento MBA jwcchoi@ucdavis.edu (916) 307-8883	**Shachi Govil** **Associate Director** Master of Science in Business Analytics shgovil@ucdavis.edu (650)520-9266	**Valerie D. James, J.D., Esq.** **Assistant Dean of Student Affairs** vjames@ucdavis.edu (530) 752-7658
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Sayana Saing **Program Manager** Bay Area MBA ssaing@ucdavis.edu (925) 208-9535	**Diana Vail** **Program Manager** Online MBA devail@ucdavis.edu (916) 920-1399	**Erica Wondra** **Associate Directory** Master of Professional Accountancy enwondra@ucdavis.edu (530) 752-9555

MARKETING & COMMUNICATION
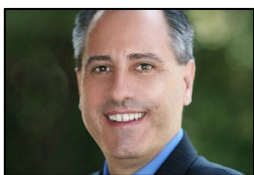
Tim Akin
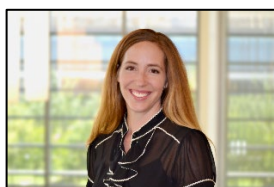Marketing & Communications
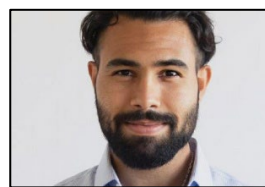tmakin@ucdavis.edu
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