

Event Planning Resources  
for New Student Leaders  
May 2018

## CONCEPTUALIZE AND ENVISION YOUR EVENT

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

## PROGRAMMING

Think about your objective or purpose and decide what kind of programming would best achieve your objectives: a keynote speaker, a panel, a workshop, a reception, an auction, etc. Do you know people who could deliver this content?

### Speakers

GSM alumni are available to speak, [Kristy Peterson, kepeterson@ucdavis.edu](mailto:kepeterson@ucdavis.edu), can help you in making these connections with the GSM alumni network and GSM business partners.

### Always Thank Your Sponsors and Participants

Thank your sponsors and alumni both verbally and in writing. Thank any alumni who donated their time and energy to help you. **A handwritten thank you note has the most impact.** It's important to remember that your actions reflect on the GSM community. If alumni feel as though their efforts are not appreciated, their willingness to participate in future events may be diminished. If the alumnus/na 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 bookstore for this purpose.

## 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 automatically 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 Calendar, and add them to the 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 your program manager, Jacqueline Romo (jmrromo@ucdavis.edu), about this reservation.

### Bishop Ranch

To reserve space at Bishop Ranch, go to <http://ems.gsm.ucdavis.edu/VirtualEMS/>. Please inform your program manager, Eva Zhang (evazhang@ucdavis.edu) and Caroll Sandifor (cesandifor@ucdavis.edu), Bay Area Instructional & Operations Manager about this reservation.

### UC Davis Medical Center (Sacramento Campus)

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

### UC Hastings (San Francisco)-MSBA

To reserve a space or facility at the UC Hastings facility, contact Shachi Govil (shgovil@ucdavis.edu).

### UC Davis

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

### Reserving other spaces

Each club or student group is responsible for identifying a non-UCDavis 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 [Diana Vail \(devail@ucdavis.edu\)](mailto:devail@ucdavis.edu), [Program Representative](#) or [Charla Kordana \(cjkordana@ucdavis.edu\)](mailto:cjkordana@ucdavis.edu), [Program Representative](#) for help with identifying off campus venues for your event.
- ✓ For more information on contracts, contact Assistant Director, Administration and Human Resources [Michele Goodman \(mlgoodman@ucdavis.edu\)](mailto:mlgoodman@ucdavis.edu).

### **Audio Visual Needs**

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

- ✓ PowerPoint
- ✓ Video
- ✓ Internet Access (Prezi, other live links)
- ✓ Room capacity for power outlets (for laptops)
- ✓ Screen
- ✓ Projector
- ✓ Microphone

- ✓ Laptop Computer

## Catering

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/](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

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 also 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](#).

## Alcohol Service on UC Davis Campus

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](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 Permit Reminders

- ✓ 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](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 2 weeks prior to event.

- ✓ [James Stevens](#) signs-off on all alcohol permits for UC Davis

For additional assistance regarding *catering*, *venue reservation* and obtaining an *alcohol permit*, contact your program manager or . . .

- Charla Kordana, GSM Event Advisor: [cjkordana@ucdavis.edu](mailto:cjkordana@ucdavis.edu)
- Diana Vail, GSM Event Advisor: [devail@ucdavis.edu](mailto:devail@ucdavis.edu)

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

Remember to consider the following:

- ✓ Class schedules
- ✓ Other events/activities (LFP workshops, finals)
- ✓ Holidays, including religious holidays
- ✓ Conflicts and complements (for instance, when most people are already available and present in one place)
- ✓ Venue and speaker availability

### FUNDING AND SPONSORSHIPS: GETTING AND SPENDING MONEY

Funding obtained from the GSM is distributed through the new umbrella organization. This process will be discussed during the Spring 2018 Leadership Summit. Updates to this section coming soon.

How to involve GSM alumni as speakers, attendees and sponsors:

- ✓ Schedule a meeting with the Director, Alumni Relations & Network Strategy, External Relations and Development, [Kristy Peterson \(mailto:kepeterson@ucdavis.edu\)](mailto:kepeterson@ucdavis.edu), as soon as you have a vision for your event.
- ✓ Kristy, along with her colleagues in Development, meets 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 Kristy 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 and/or sponsor your event
  - You have the GSM Development team as a resource
  - Donations to your event will count in the GSM fundraising and alumni participation totals (great branding for the school)
  - Introductions to GSM alumni – the development team is happy to make a personal connection
  - Fundraising logistics are already in place including:
    - Online link to donate
    - Established fund: the Student Activities Fund
    - Gift processing documentation
    - Tax receipt system (receipts will automatically be sent to a donor when they make a gift to the GSM Student Activities Fund). Please note, a 6% gift fee on each donation will be assessed by UC Davis
  - Marketing Resources allow you to leverage the school's alumni communication channels

- Monthly alumni e-news, *accelerator*
- GSM LinkedIn & Facebook pages
- GSM Alumni Directory
- Assistance with evite (sending to all alumni)
- Opportunities to attend alumni association board meeting and promote your event.

## Sponsorships

Questions about how to best secure sponsorships, contact [Kristy Peterson](#) at [kepeter@ucdavis.edu](mailto:kepeter@ucdavis.edu) she can put you in touch with GSM Alumni.

## 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 organization, you must contact Director of Development and Alumni Relations [Kristy Peterson](#) to discuss your ideas. Contacting GSM staff first will ensure that you are prepared to proceed with success. They can also assist in brainstorming ideas for natural partners that may be in a better position to assist in your fundraising efforts (See Appendix 1 & 2).

## 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. GSM Development and Alumni Relations staff will also be able to help clubs get in contact with Alumni and businesses who have donated items in the past.

## Payment & Finances (ASM Sponsorship)

The university has very specific methods for tracking your payment and finances. You can ask your program managers for assistance on this, or for more complicated questions, contact [James Stevens](#) or [Michele Goodman](#) at [mlgoodman@ucdavis.edu](mailto:mlgoodman@ucdavis.edu). If you are dealing with in-kind donations, contact Kristy Peterson.

## INVITATIONS/RSVP

### Event Registration

For online event registration portals, the GSM uses Event Brite, Brown Paper Tickets, and RegOnline. Use RegOnline if you plan to collect money for your event. If you plan to **not collect money**, than you can use Event Brite. If you have any questions regarding these tools contact your program manager.

Basic Template for Invitations  
Event Brite

Description	
Logistical Details	
Food Served	
Date and Time	
Location	
	<p><b>DESCRIPTION</b></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 Greed 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 22 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 Cullman professor of marketing. Learn more at: <a href="http://gsm.ucdavis.edu/faculty/h-rao-unnava">http://gsm.ucdavis.edu/faculty/h-rao-unnava</a></p> <p>Drinks and appetizers provided. Please feel free to invite a guest. RSVP Requested by October 19.</p> <p><b>Details</b></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>

MailChimp Invitation

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**

Obtain approval for the text of your invitation from Tim Akin or James Stevens. Send the content and the photo to Tim Akin or the unpublished invitation.

## Guest Lists

To build a guest list, you will want to consider the following groups: current students, staff, alumni, faculty members, Dean, GSM friends, and relevant guest speakers.

To reach out to GSM alumni, including the GSM Alumni Board, please contact or Director of Development and Alumni Relations [Kristy Peterson](#). For information on contacting current students, faculty and the Dean's Office, please contact your program manager.

## PROMOTION, MARKETING AND COMMUNICATION GUIDELINES

In order to post information on club websites or any GSM website including the GSM web calendar, you need editing access to Drupal, the GSM Content Management System. Contact Director of Web Marketing [Lisa Nguyen](#) at [lmwnguyen@ucdavis.edu](mailto:lmwnguyen@ucdavis.edu) or Executive Director, Marketing and Communications, [Tim Akin](#) at [tmakin@ucdavis.edu](mailto:tmakin@ucdavis.edu) to get access and training.

Create an event webpage on the GSM website and 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.

Places to Promote Your Event-Multi-Channel Marketing	
Publication	For Assistance Contact
Alumni Newsletter	Director, Alumni Relations
Classroom Announcements	Program Manager
Emails-GSM Group Lists	Program Manager
Face to Face	NA-Up to Student Leaders
Flyers and Posters	Program Manager
GSM Display Monitors	Program Manager, EMS, Director of Web Marketing
GSM Facebook page, and Twitter Accounts, other Social Media	Executive Director, Marketing & Communications
GSM Website	Student Leaders (Program Managers)
Invitations & Save the Date (Email or Hard copy)	Student Leaders
Pre-Class Slides and White Board	Student Leaders (Program Managers)
Student E-Newsletter	Program Manager
Text Messages	NA-Up to Student Leaders
Instagram	NA-Up to Student Leaders
Program Event Facebook Page	NA-Up to Student Leaders

## UC Davis 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 approved for use by official student groups. Students can use the logo with permission from the Senior Assistant Dean for Student Affairs James Stevens.



If your club uses this logo on your 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 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.

#### Ask for Permission to use Logo

Please contact [Senior Assistant Dean of Student Affairs James Steven](mailto:jrstevens@ucdavis.edu) at [jrstevens@ucdavis.edu](mailto:jrstevens@ucdavis.edu) or the [Executive Director of Marketing and Communications Tim Akin](mailto:tmakin@ucdavis.edu) at [tmakin@ucdavis.edu](mailto:tmakin@ucdavis.edu) for permission to use and obtain the logo above in various formats: jpg, eps, tif, pdf and gif, in both color and black and white.

**DO NOT CHANGE THE LOGO IN ANY WAY!**

#### **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 these trademarks and must approve their use.

#### Rules to Follow

1. Groups are not permitted to use the University 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

3. 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
4. Use only official fonts and colors for your invitations.

## 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 STUDENTS		
Time Frame	Date	Task
12-8 months in advance of event	TBD	<b>Conceptualize/Envision</b> your event: purpose and objective, theme, fun activities, workshop, casual, formal etc.
12-8 months prior to the event start date (ideally takes 6-8 weeks to complete)	TBD	Set up <b>contracts</b> as soon as your event type has been determined. This process can take a long time and has to work its way through the University bureaucracy
12-8 months in advance of event (8 months at the latest)	TBD	<b>Reserve a venue:</b> may need a contract set-up prior to reserving the venue
8 months in advance of event	TBD	Start the process of <b>soliciting sponsorships</b> for your event
8-7 months prior to event start date. (or as soon as venue and theme is finalized)	TBD	Add event to EMS calendar to reserve rooms in Gallagher Hall
7-6 months prior to event	TBD	Complete the major programming—schedule <b>speakers, workshop leads, auctioneers</b> , etc.
7-6 months prior to event	TBD	Set-up online <b>registration</b> for the event or have invitations ready to be sent <sup>1</sup>
5-4 months prior to event	TBD	Start developing all project plans, <b>marketing collateral</b> , flyers, invitations, and web designs to be ready to go public 8wks prior to beginning of event.
5-4 months prior to the event.	TBD	<b>Promote</b> 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
3 months prior to event		Save the date email sent out
2 months prior to event	TBD	Submit <b>alcohol permit</b> should be submitted
2 months prior to event	TBD	Order <b>catering</b> with expected number of attendees (this can be updated and changed one week prior to the event depending on the vendor)
11 wks. prior to event	TBD	Draft email invitation to event—MailChimp
6 wks. prior to event	TBD	If applicable, print or send invitations <b>if using bulk mailings for mailing—US mail</b>
3 wks. prior to event	TBD	Send email reminder with rsvp information for those who have NOT responded yes or no
3 days prior to event	TBD	Send email reminder to attend the event to those who responded they would be attending
2 days prior to 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 Gallagher hall, empty trash and recycle. Wipe down tables and remove all equipment
1 wk. after event	TBD	Turn in all expenses for reimbursement to the business office—create final expense sheet to make it decipherable for the business office
1 wk. after event	TBD	Send thank you emails or cards to guest speakers

<sup>1</sup> Create an early bird incentive discount that is scheduled to end one month prior to the event starting.

## EVENT LOGISTICS (PLANNING)

You may use the template below as a guide to plan your event logistics and 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	

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

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

INVITED/ATTENDED										
	Alumni	Staff	Fac	FTMBA	SAMBA	BAMBA	MPAc	MSBA	Other	Total
To Invite										
# Invited										
# Attended										

FINAL OVERALL ATTENDANCE

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

EVENT SPONSORS			
SPONSOR NAME:			
Service	Terms	Date Finalized	Point Person
Contracts Created			
Agreements Confirmed with Business Office			
SPONSOR NAME:			
Service	Terms	Date Finalized	Point Person
Contracts Created			
Agreements Confirmed with Business Office			

EVENT REGISTRATION	
Point Person:	
Task	Date Completed:
Eventbrite/RegOnline set up?	
MailChimp draft sent to Tim Akin?	
Evite drop date:	
Evite Reminder to Register drop date:	
RSVP list from registrations sent to DOs (1 week prior)?	
Update RSVPs in AIS?	
Send RSVP list from Michelangelo to DOs (3 days prior)	
Update AIS with final participants (post event)?	
Finalize event summary	

MARKETING	
Point Person:	
Task	Date Completed:
Create Web page	
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 <a href="#">Group Distribution Lists</a> )	



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 1 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	
Setup 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>	
<i>Check-in table</i>	
<i>Other Setup Needs</i>	

VENUE 2 SET-UP	
Venue	
Room	
Reservation Date	
Venue Coordinator (VC)	
VC Email	
VC Phone	
VC Cell/Emergency #	
Set up time	
Program Start Time	
Breakdown Time	
Confirmation#	
Estimated cost	
Other details	
VENUE/ROOM SET UP	
Number of people	
Number per table	
Number of Tables	
Set up Themes:	
<i>Theater/Lecture</i>	
<i>Banquet Rounds</i>	
<i>Crescent Style Rounds</i>	
<i>Highboy Tables</i>	
<i>Other Setup</i>	
<i>Food and Beverage Station</i>	
Registration table	
<i>Other Set-up Needs</i>	

ADDITIONAL SERVICES	
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 1-Type	
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		Notes:
Contact name		
Email		
Phone		
Cell/Emergency #		
Arrival Date		
Arrival time		
Retrieval Date		
Retrieval Time		
Date Ordered		
Date Confirmed		
Estimated cost		
Actual Cost		
Other details		
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		

NAMETAGS	
Type	
Table #'s on nametags	
Other info for nametag	
ADDITIONAL PRINTED MATERIALS	
Event Schedule/Program	
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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8 months in advance of event	TBD	Start the process of <b>soliciting sponsorships</b> for your event
8-7 months prior to event start date. (or as soon as venue and theme is finalized)	TBD	Add event to EMS calendar to reserve rooms in Gallagher Hall
7-6 months prior to event	TBD	Complete the major programming—schedule <b>speakers, workshop leads, auctioneers</b> , etc.
7-6 months prior to event	TBD	Set-up online <b>registration</b> for the event or have invitations ready to be sent <sup>2</sup>
5-4 months prior to event	TBD	Start developing all project plans, <b>marketing collateral</b> , flyers, invitations, and web designs to be ready to go public 8wks prior to beginning of event.
5-4 months prior to the event.	TBD	<b>Promote</b> 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
3 months prior to event		Save the date email sent out
2 months prior to event	TBD	Submit <b>alcohol permit</b> should be submitted
2 months prior to event	TBD	Order <b>catering</b> with expected number of attendees (this can be updated and changed one week prior to the event depending on the vendor)
11 wks. prior to event	TBD	Draft email invitation to event—MailChimp
6 wks. prior to event	TBD	If applicable, print or send invitations <b>if using bulk mailings for mailing—US mail</b>
3 wks. prior to event	TBD	Send email reminder with rsvp information for those who have NOT responded yes or no
3 days prior to event	TBD	Send email reminder to attend the event to those who responded they would be attending
2 days prior to 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 Gallagher hall, empty trash and recycle. Wipe down tables and remove all equipment
1 wk. after event	TBD	Turn in all expenses for reimbursement to the business office—create final expense sheet to make it decipherable for the business office
1 wk. after event	TBD	Send thank you emails or cards to guest speakers

<sup>2</sup> Create an early bird incentive discount that is scheduled to end one month prior to the event starting.

Packing List To Go	
<p>PRINTED MATERIALS (qty):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Event Programs</li> <li><input type="checkbox"/> Name Tags</li> <li><input type="checkbox"/> Menu Cards</li> <li><input type="checkbox"/> Place Cards</li> <li><input type="checkbox"/> Signage</li> <li><input type="checkbox"/> Speaker Handouts</li> <li><input type="checkbox"/> Water for speaker at lectern</li> <li><input type="checkbox"/> Speaker gift (Thank you)</li> <li><input type="checkbox"/> Table Center Pieces</li> <li><input type="checkbox"/> Parking Passes: #</li> <li><input type="checkbox"/> Banners</li> </ul>	<p>SUPPLIES:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Printed nametags</li> <li><input type="checkbox"/> Blank nametags</li> <li><input type="checkbox"/> Sharpie pens</li> <li><input type="checkbox"/> Planning Folder</li> <li><input type="checkbox"/> RSVP list</li> <li><input type="checkbox"/> Laptop and presentation</li> <li><input type="checkbox"/> Projector (already there)</li> <li><input type="checkbox"/> CD or iPod w/ music</li> <li><input type="checkbox"/> Digital Camera</li> <li><input type="checkbox"/> Decorations</li> </ul>
<p>ADDITIONAL HANDOUTS:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Promotional Pens</li> <li><input type="checkbox"/> Small pads of paper</li> <li><input type="checkbox"/> GSM pins</li> <li><input type="checkbox"/> Giveaways</li> <li><input type="checkbox"/> Prizes</li> </ul>	<p>TOOLBOX:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Scissors</li> <li><input type="checkbox"/> Scotch Tape</li> <li><input type="checkbox"/> Painters Tape</li> <li><input type="checkbox"/> Stapler</li> <li><input type="checkbox"/> Batteries (AA &amp; 9 volt)</li> <li><input type="checkbox"/> Post-its</li> <li><input type="checkbox"/> Highlighters</li> <li><input type="checkbox"/> Rubber bands</li> <li><input type="checkbox"/> Paper clips</li> <li><input type="checkbox"/> Binder clips</li> <li><input type="checkbox"/> Safety pins</li> <li><input type="checkbox"/> Band aids</li> </ul>



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



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### Fundraising Terms:

**Identification:** your list of potential donors/companies

**Cultivation** 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

(taken from the CSI website: [http://campusunions.ucdavis.edu/?page\\_id=981](http://campusunions.ucdavis.edu/?page_id=981))

A student organization is not considered a tax-exempt organization (the exception is C4C which is raising funds for a separate entity) and is therefore, not able to issue tax receipts for donations. The thank you letter from the student organization cannot state that the gift is tax deductible. This is based on the fact that the organization is not 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, 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 Kristy Peterson.

For tracking purposes, you are expected to notify Lana Watts or Kristy Peterson 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.

Big Bang! is different from other student organizations in that the GSM's Development & External Relations unit handles and monitors all gifts. Big Bang! gifts are tax deductible and a gift processing fee is applied to cover UC Davis administrative costs.

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 Kristy Peterson so we can assist you in this process.

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

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*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): make sure this is done within campus policy guidelines (see Center for Student Involvement website: <http://csi.ucdavis.edu/>)

*What elements have we seen in successful events?*

- Location/ambiance
- Using an interesting, relevant speaker, film, or other attraction
- Understand your audience
- Timing/Planning: must work far ahead—create a timeline starting with the event date and working backwards: understand and avoid date conflicts (other events, exams, midterms, holiday weekends, etc.—consider piggy-backing on an existing event an option to save money, 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
- AND 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 them
- 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 followed through... 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 and coordinate with GSM development officers.
- PLEASE—Prior to contacting any GSM donors or volunteers, you must discuss your interest with the GSM Development and External Relations office 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
- 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?)
- 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-