

QUICK DETAILS**EVENT TAKE OFF**

Event Name: _____ Date Start: _____ Time: _____

Date End: _____ Time: _____ Venue(s): _____

Address: _____ City: _____ St: _____ Zip: _____

Event Type: _____ Security Level: _____ Plan Approval Date: _____ Count: _____

RSVP Date: _____ Invite Mail Date: _____ Invite List Date: _____ Bio Date: _____

Budget Guide*: _____ Budget Available: _____ Acctg Code(s) / % _____

*Budget Guide ~ This amount is the aggregate cost per person to produce the event ~ THIS IS A GUIDE ONLY

- Level 1 over \$300 - Major Gala, Head of State, High Level Donor Event, Momentus Occasions, Presidential as Requested, High Level Ceremonies, Regents .
- Level 2 up to \$300 - Dignitaries/IPs, Ceremonies, Donor/Prospect, Building Dedications, Regents , President Retirement, Distinctive Alumni, External Relations .
- Level 3 up to \$150 - Donor, Building Dedications, Groundbreakings, Notable Lecturers, External Relations, Regents, Cabinet Level Welcome & Farewell.
- Level 4 up to \$100 - Donor, Groundbreakings, Important Lecturers, Dean/AVP Welcome & Farewell, External Relations, Development, Sr. Staff Retreats
- Level 5 up to \$50 - Lecturers, Symposiums, Div Retreats, Holidays, Staff Receptions, Staff Welcome & Farewell, Pacific Friendraising, Noteworthy Meetings.
- Level 6 up to \$25 - Internal Meetings, Working Lunch / Dinner, Gatherings

HOST CONTACT

Contact: _____ Organization: _____

Address: _____ City: _____ St: _____ Zip: _____

Ph(O): _____ Ph(M): _____ Ph(F): _____ Email: _____

APPROVALS

Event Producer: _____ Ph: _____ Email: _____

Budget Approval: _____ Ph: _____ Email: _____

Guest Approval: _____ Ph: _____ Email: _____

Design Approval: _____ Ph: _____ Email: _____

KEY INDICATORS**EVENT DESCRIPTION:****MESSAGE:****ROI - MEASUREMENT:**

- Client Response
 Leads
 Client Retention
 Total Attendance
 Revenue
 Survey Results
 Attendee Quality
 Administration Feedback
 Gift Fund Growth
 Press & Media Coverage

OUTCOME:**CONFLICTING EVENTS:****CONTINGENCY PLAN:**

VENUE DETAILS

Room Dimensions: _____ Square Feet: _____ Loading Dock: _____

Ceiling Height: _____ Door Widths: _____ ADA Access: _____

Room Capacity: _____ Power Availability: _____

Fire Exits: _____ Elevators (Size): _____ Restrooms: _____

Equipment: _____

Reservation Details: _____

GUEST LIST DEVELOPMENT GROUP ~ Name & Phone Number

Name: _____ Name: _____

Name: _____ Name: _____

Name: _____ Name: _____

Name: _____ Name: _____

CATERING DETAILS

Day/Time: _____	Day/Time: _____	Day/Time: _____	Day/Time: _____
Dress: _____	Dress: _____	Dress: _____	Dress: _____
Beverage: _____	Beverage: _____	Beverage: _____	Beverage: _____
Hosted: _____	Hosted: _____	Hosted: _____	Hosted: _____
Service: _____	Service: _____	Service: _____	Service: _____
Waiters: _____	Waiters: _____	Waiters: _____	Waiters: _____
Type: _____	Type: _____	Type: _____	Type: _____
Tasting: _____	Tasting: _____	Tasting: _____	Tasting: _____

EVENT COMPONENTS ~ LILO

- | | | | |
|---|---|---|---|
| <input type="checkbox"/> Program | <input type="checkbox"/> Ticketed Event | <input type="checkbox"/> By Invitation Only | <input type="checkbox"/> Open to Campus |
| <input type="checkbox"/> Open to Public | <input type="checkbox"/> President / Regents | <input type="checkbox"/> Head of State/Gov't Official | <input type="checkbox"/> IPs / Celebrities |
| <input type="checkbox"/> Media Presence Expected | <input type="checkbox"/> Vendors/Retail/Booths | <input type="checkbox"/> FX ~ Special Effects | <input type="checkbox"/> Technology ~ AV |
| <input type="checkbox"/> Rentals/Tent/Stage/Fence | <input type="checkbox"/> Shuttle / Carts / Valet | <input type="checkbox"/> Special Parking Required | <input type="checkbox"/> Credentials Required |
| <input type="checkbox"/> Live Music / Amplified | <input type="checkbox"/> Games, Inflatables, Activities | <input type="checkbox"/> Public Safety / Security | <input type="checkbox"/> Alcohol Served |

Load In: Start Date: _____ Start Time: _____ End Date: _____ End Time: _____

Load Out: Start Date: _____ Start Time: _____ End Date: _____ End Time: _____

Comments:

TASK ASSIGNMENTS - Note that the tasks in **BOLD** are Task Leaders, who are responsible for overseeing the performance of each task category.

- | | |
|--|--|
| <input type="checkbox"/> ACTIVITIES | <input type="checkbox"/> GUEST LIST |
| <input type="checkbox"/> Design & Plan | <input type="checkbox"/> Guest List Build Lead |
| <input type="checkbox"/> Acquire & Coordinate | <input type="checkbox"/> RSVP Contact |
| <input type="checkbox"/> CATERING | <input type="checkbox"/> SaveTD & Invitation Design |
| <input type="checkbox"/> Adult Beverages | <input type="checkbox"/> Distribution Coordinator |
| <input type="checkbox"/> NA Beverages | <input type="checkbox"/> Follow Up Phone Calls |
| <input type="checkbox"/> Menus - design & order | <input type="checkbox"/> Biographies |
| <input type="checkbox"/> Tastings | <input type="checkbox"/> Name Badges & Place Cards |
| <input type="checkbox"/> Catering Coordination | <input type="checkbox"/> MARKETING |
| <input type="checkbox"/> DESIGN & DECOR | <input type="checkbox"/> Creative |
| <input type="checkbox"/> Creative & Development | <input type="checkbox"/> Media Buys |
| <input type="checkbox"/> CAD Layout | <input type="checkbox"/> Photographer - Still |
| <input type="checkbox"/> Floral | <input type="checkbox"/> Photographer - Video |
| <input type="checkbox"/> Decor Elements | <input type="checkbox"/> Video Presentations |
| <input type="checkbox"/> Table Place Cards (#'s) | <input type="checkbox"/> Printed / Digital Program |
| <input type="checkbox"/> Coordination | <input type="checkbox"/> Printed / Digital Menu |
| <input type="checkbox"/> ENTERTAINMENT / TALENT | <input type="checkbox"/> Event Photo Book |
| <input type="checkbox"/> Research Talent | <input type="checkbox"/> Media Coordinator |
| <input type="checkbox"/> Negotiate & Book | <input type="checkbox"/> Press Releases |
| <input type="checkbox"/> Backline - acquire & coord | <input type="checkbox"/> Banners / Posters / etc. |
| <input type="checkbox"/> Travel Arrangements | <input type="checkbox"/> PERMITS |
| <input type="checkbox"/> Ground Transportation | <input type="checkbox"/> ID, Apply, Acquire, Coord |
| <input type="checkbox"/> Hotel | <input type="checkbox"/> SUPPORT SERVICES |
| <input type="checkbox"/> Hospitality | <input type="checkbox"/> Submit Service Request (SR) |
| <input type="checkbox"/> Host & Escort | <input type="checkbox"/> EPS Author & Manager |
| <input type="checkbox"/> Advance the show | <input type="checkbox"/> Coordination |
| <input type="checkbox"/> Show Director (show caller) | <input type="checkbox"/> PROGRAMMING |
| <input type="checkbox"/> FACILITIES | <input type="checkbox"/> Creative & Development |
| <input type="checkbox"/> Research & Identify Venues | <input type="checkbox"/> Copywriting |
| <input type="checkbox"/> Negotiate & Contract | <input type="checkbox"/> Run of Show Creator |
| <input type="checkbox"/> Coordination | <input type="checkbox"/> Coordination |
| <input type="checkbox"/> FINANCIAL | <input type="checkbox"/> RENTAL EQUIPMENT |
| <input type="checkbox"/> Create Budget | <input type="checkbox"/> ID needs & source |
| <input type="checkbox"/> Budget Manager | <input type="checkbox"/> Order & receive |
| <input type="checkbox"/> Approves Expenses | <input type="checkbox"/> Coordination |
| <input type="checkbox"/> AR & AP | <input type="checkbox"/> INCIDENT COMM & ES |
| <input type="checkbox"/> Post Event Reporting | <input type="checkbox"/> Identify needs & write IAP |
| <input type="checkbox"/> GIFTS & AWARDS | <input type="checkbox"/> Fire & EMS |
| <input type="checkbox"/> Research | <input type="checkbox"/> Credentials |
| <input type="checkbox"/> Purchase | <input type="checkbox"/> LE & Security Needs |
| <input type="checkbox"/> Coordination & Distribution | <input type="checkbox"/> Incident Commander |

EVENT COMMITTEE

Event Chair:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____
Committee:	_____	Ph: _____	Email: _____

EVENT TYPE & TARGET AUDIENCE CHECK LIST ~ Brackets [] are considered "Possible Invitees" ~ Detail Group List in General Notes below.

- Gala Event Regents; Fmr Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; Marketing; Athletics; SL; Direct Cabinet Reports; Academic Council; [SAC]; ASUOP; Student Groups; [PAA Bd] ~ [Key Alumni]; [Govt Officials]; [Community Leaders]; [Higher Ed Reps]
- H of St / Dignataries Regents; Fmr Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; Academic Council; [SAC]; ASUOP; Student Groups; [PAA Bd] ~ [Key Alumni]; [Govt Officials]; [Community Leaders]; [Higher Ed Reps]
- Honorary Degree Regents; Fmr Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; Academic Council; [SAC]; ASUOP; Student Groups; [PAA Bd] ~ [Key Alumni]; [Govt Officials]; [Community Leaders]; [Higher Ed Reps]; Faculty
- Ground Breakings Regents; Fmr Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; Academic Council; [SAC]; ASUOP; Student Groups; [PAA Bd] ~ Key Alumni; Govt Officials; Community Leaders; Event Specific Donors & Dev Officers; [Advisory Groups]; Emeriti Faculty;
- Dedications Regents; Fmr Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; Academic Council; [SAC]; ASUOP; Student Groups; [PAA Bd] ~ Key Alumni; Govt Officials; Community Leaders; Event Specific Donors & Dev Officers; [Advisory Groups]; Emeriti Faculty;
- Major Lecture Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; Academic Council; ASUOP; Student Groups; PAA Bd ~ [Govt Officials]; [Community Leaders]; Event Specific Donors & Dev Officers; [Advisory Groups]; Emeriti Faculty; [Higher Ed Reps]
- Celebration Kick-Off Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; Academic Council; ASUOP; Student Groups; PAA Bd ~ [Govt Officials]; [Community Leaders]; Event Specific Donors & Dev Officers; [Advisory Groups]; Emeriti Faculty; [Higher Ed Reps]
- Donor Events Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; [Academic Council]; PAA Bd ~ [Govt Officials]; [Community Leaders]; Event Specific Donors & Dev Officers; [Emeriti Faculty]; Key Alumni
- Alumni Dinner/Recept Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; [Academic Council]; PAA Bd ~ [Govt Officials]; [Community Leaders]; Event Specific Donors & Dev Officers; [Emeriti Faculty]; Key Alumni
- Gift Acknowledge Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; [Academic Council]; PAA Bd ~ [Govt Officials]; [Community Leaders]; Event Specific Donors & Dev Officers; [Emeriti Faculty]; Key Alumni
- Funeral/Memorial Regents; Major Donors; Cabinet; Academic Deans; [COD]; Leadership from: Develop; [Marketing]; [Athletics]; [SL]; [Direct Cabinet Reports]; [Academic Council]; PAA Bd ~ [Govt Officials]; [Community Leaders]; Event Specific Donors & Dev Officers; [Emeriti Faculty]; Key Alumni
- Welcome/Retirement [Regents]; [Fmr Regents]; [Major Donors]; Cabinet; Academic Deans; COD; Leadership from: Develop; Marketing; Athletics; SL; Direct Cabinet Reports; Academic Council; SAC; ASUOP; Student Groups; [PAA Bd] ~ [Govt Officials]; [Community Leaders]; [Emeriti Faculty]; [Advisory Groups];
- Community Event [Regents]; [Major Donors]; Cabinet; Academic Deans; COD; Leadership from: [Develop]; Marketing; Athletics; SL; Direct Cabinet Reports; Academic Council; [ASUOP]; [Student Groups]; [PAA Bd] ~ Govt Officials; Community Leaders; [Advisory Groups]; [Higher Ed Reps]
- External Event Events hosted by an external organization. Review event with External Relations and Development to ascertain who may want to be included on the guest list if appropriate.

BINDER TABS & ELECTRONIC FILE ORGANIZATION - check categories needed for this event. Set up Binders and Computer Files

- Activities** - games, team building, excursions, trips, things for guests and spouses to do, hands on activities
- BIOs** - research reports on IPs from Advancement Services
- Budget** - budget, either detail or summary
- Collateral Material** - brochures, handouts, name tags, menu cards, reports, etc. (not invitations, printed programs)
- Contacts** - committee names, vendors, suppliers, important contacts
- Decor & Floral** - planning notes, sets, floral, plans, schedules, design layouts
- EPS:** Event Production Schedule - All tasks from start to finish. Microsoft Access program. Include all change orders in this file
- F&B** - Catering Requests, contracts, schedules, beverage purchases, wine donations, guest meals, hospitality riders, reservations
- Facilities, Properties, Venues** - all information about the properties, contacts, requirements, policies, rules, contacts
- Guest Lists** - lists from Advancement Services and others, keep up-to-date, RSVPs, follow up call tracking
- Hotel** - all hotel arrangements
- IAP:** Incident Action Plan - emergency services, police, fire, medical, what if scenarios and action plan
- Insurance** - Risk Management review, insurance needs, insurance forms
- IPs:** People of Importance - lists, hosting arrangements, other details as needed to serve the important people
- Layouts** - CAD Drawings, computer assisted drafting of all venues being used, to scale
- Marketing** - all marketing efforts, sales, PR and advertising, ad copy, layouts, outdoor, posters, radio, TV, buys
- Matrix** - commonly used for events with many sub-events to keep the flow of rentals and other equipment running smoothly
- Meeting Notes** - agendas, meeting notes, emails, correspondence, miscellaneous notes
- Parking** - arrangements for special parking, parking enforcement suspension, reserved spaces, public safety approvals, layouts
- Permits & Contracts** - City, State, County, Federal, Sales Tax, Health, Fire, CHP, Road Closure, Assemblage, ABC, Tents, Contracts, etc.
- Program** - printed programs and digital programs
- Purchases** - quotes, purchase orders, receipts, check requests
- Rentals** - quotes, purchase orders, receipts, check requests
- ROS:** Run of Show - time line for the event, speakers and performers, information for catering, post on podium & in kitchen
- Seating** - layouts, seating charts, place cards
- Signage** - designs, layout placement maps, quotes, orders, receipts
- Speakers** - list of speakers, CVs, Bios, remarks
- SR:** Service Request - FAMIS submission to Support Services, basic information on the SR, details on the EPS
- Staffing** - hired, volunteers, students, Ambassadors, interns, schedules, org schedule, valet, chauffers, photo, video, Event Staff
- Take Off Sheet** - this form, the foundation of all events.
- Talent** - musical, drama, performers, lecturers, presenters, contracts, payment info, hospitality rider, hotel, transportation, schedules
- Technical** - sound, staging, lighting, special effects, video, tech riders, schedules, needs
- Ticketing** - ticket design, ticket contracts, outlets, sources, brokers

ADDITIONAL ORGANIZATIONAL NOTES

SPEAKERS & KEY ATTENDEES

<input type="checkbox"/> President	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Provost	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> VP Business & Finance	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> VP External Relations	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> VP Development	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> VP, Asst to President	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Athletic Director	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ BSE	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ COP	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ COM	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ DENTAL	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ ECS	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ ESB	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ Library	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ Law	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ Pharmacy	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> Dean ~ SIS	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____
<input type="checkbox"/> OTHER - SEE BELOW	<input type="checkbox"/> Speak	<input type="checkbox"/> Attend	Approved by: _____	Date: _____

ADDITIONAL SPEAKER / ATTENDEE NOTES

GENERAL NOTES