

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, Momentum 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

☐ Program

☐ Ticketed Event

☐ By Invitation Only

☐ Open to Campus

☐ Open to Public

☐ President / Regents

☐ Head of State/Gov't Official

☐ IPs / Celebrities

☐ Media Presence Expected

☐ Vendors/Retail/Booths

☐ FX ~ Special Effects

☐ Technology ~ AV

☐ Rentals/Tent/Stage/Fence

☐ Shuttle / Carts / Valet

☐ Special Parking Required

☐ Credentials Required

☐ Live Music / Amplified

☐ Games, Inflatables, Activities

☐ Public Safety / Security

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

<input type="checkbox"/> SIGNAGE		<input type="checkbox"/> TRAVEL / ENTERTAINMENT	
<input type="checkbox"/> Identify needs		<input type="checkbox"/> Travel	
<input type="checkbox"/> Design & production		<input type="checkbox"/> Hotel	
<input type="checkbox"/> Order		<input type="checkbox"/> Ground Transportation	
<input type="checkbox"/> Placement		<input type="checkbox"/> Hospitality / Restaurants	
<input type="checkbox"/> Coordination		<input type="checkbox"/> Activities / Excursions	
<input type="checkbox"/> SPONSORS		<input type="checkbox"/> MEETINGS	
<input type="checkbox"/> Create Sales Materials		<input type="checkbox"/> Venue & Spaces	
<input type="checkbox"/> Sales		<input type="checkbox"/> Technology Requirements	
<input type="checkbox"/> Site Benefit Coordination		<input type="checkbox"/> Meeting Schedule	
<input type="checkbox"/> Site Benefit Implementation		<input type="checkbox"/> Meeting Agendas	
<input type="checkbox"/> Follow up		<input type="checkbox"/> Meeting Coordination	
<input type="checkbox"/> DONORS, SPONSORS & IPs		<input type="checkbox"/> Guest Coordination	
<input type="checkbox"/> Guest Ambassador Lead		<input type="checkbox"/> VENUE CONTACTS / PH#'s	
<input type="checkbox"/> IP Ambassador Lead		<input type="checkbox"/> Catering	
<input type="checkbox"/> STAFF / VOLUNTEERS		<input type="checkbox"/> Sales, Meeting Space	
<input type="checkbox"/> Student Ambassadors		<input type="checkbox"/> Back of House	
<input type="checkbox"/> Ushers		<input type="checkbox"/> Front of House	
<input type="checkbox"/> Volunteers		<input type="checkbox"/> Concierge	
<input type="checkbox"/> Hired Temps		<input type="checkbox"/> Technology	
<input type="checkbox"/> Campus Event Staff		<input type="checkbox"/> Load In and Strike	
<input type="checkbox"/> Guest Services Table		<input type="checkbox"/> Maintenance / Plant	
<input type="checkbox"/> Greeters & Host / Hostess		<input type="checkbox"/> Security	
<input type="checkbox"/> Training		<input type="checkbox"/> Sales, Guest Rooms	
<input type="checkbox"/> STAGE MANAGEMENT		<input type="checkbox"/> Activities	
<input type="checkbox"/> Stage Crew		<input type="checkbox"/> ADA COMPLIANCE	
<input type="checkbox"/> FLOOR DIRECTION		<input type="checkbox"/> Identify Needs	
<input type="checkbox"/> Load in / Strike Coordination		<input type="checkbox"/> Site Needs	
<input type="checkbox"/> Floor Director		<input type="checkbox"/> Sight & Hearing	
<input type="checkbox"/> TECHNICAL DIRECTION		<input type="checkbox"/> Accessibility	
<input type="checkbox"/> FX and Presentations		<input type="checkbox"/> Parking & Transport	
<input type="checkbox"/> Sound and Lighting		<input type="checkbox"/> Overall Coordination	
<input type="checkbox"/> Stage		<input type="checkbox"/> VENDORS	
<input type="checkbox"/> TRANSPORTATION		<input type="checkbox"/> Recruitment & Sales	
<input type="checkbox"/> Roads & Parking		<input type="checkbox"/> Vendor Coordination	
<input type="checkbox"/> Golf Carts		<input type="checkbox"/> RISK MANAGEMENT	
<input type="checkbox"/> Shuttles		<input type="checkbox"/> Insurance	
<input type="checkbox"/> Limousines		<input type="checkbox"/> Assessment & Compliance	
<input type="checkbox"/> Buses		<input type="checkbox"/> SUSTAINABILITY	
<input type="checkbox"/> Valet Service		<input type="checkbox"/> Assessment & Compliance	
<input type="checkbox"/> Coordination		<input type="checkbox"/> Implementation	

EVENT COMMITTEE

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

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

<input type="checkbox"/> 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]
<input type="checkbox"/> 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]
<input type="checkbox"/> 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
<input type="checkbox"/> 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;
<input type="checkbox"/> 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;
<input type="checkbox"/> 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]
<input type="checkbox"/> 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]
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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];
<input type="checkbox"/> 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]
<input type="checkbox"/> 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

