As you begin planning your event…………………………

I. Decide what type of event is needed.

II. Determine how the event will be paid for.
   1. Determine the MoCode or other means of payment
   2. Does a new account need to be established?
   3. Remember - gift accounts cannot be used to pay bills.

III. Find a date.
   1. Check the University Advancement master calendar
   2. Check with the Chancellor’s office (if you want the chancellor to attend)
   3. Check with appropriate dean and other key figures

IV. Find an appropriate space.
   1. On campus or off campus
   2. Prepare and send the space reservation form or request a contract

V. If money is coming in, how will it be handled?
   1. If the money only covers expenses (no quid pro quo) then it is handled through the cashier’s office (not gift processing). You (or your department fiscal officer) will need to prepare money received reports.

   2. If it is a fund raising event and ticket money includes a tax deductible portion, then the quid pro quo must be determined as well as an allocation code (Scott Simmons), account to be used to pay bills and account that will receive the profits. All this information needs to be shared with Donna Bonner in Advancement Services.
VI. Guest list
1. Start guest list construction by using the Advance list of lists. The more you can use Advance (the campus alumni, donor, constituent data base) the better your list will be.

2. If working with an external group, request their list(s) in an electronic format, preferably an Excel file (with last name in a separate column), to make de-duping easier.

3. Following an event, all new data should be shared with Development Systems for inclusion in Advance.

NOW - as you progress in the planning, remember the following:

I. Create an event timeline. Working back from the event date, what are the critical deadlines?

II. Create an event sheet with all pertinent info:
   - Date, time, place
   - MoCode, contacts with phone numbers
   - Program sequence
   - Room set up and/or food

III. Communicate:
   - Talk directly with your vendors
   - Send room diagram to venue and to caterer
   - Write the details on the diagram (number of tables, chairs, etc)
   - Include details with food order

IV. Day of the event - give yourself enough time. Arrive at the venue early so you have time to make changes. Most likely it won’t be exactly as you had pictured. Don’t assume – check everything. During the event, keep your eyes open for things that need attention.

V. Use available campus resources – you don’t have to reinvent the wheel!

VI. Keep good files - they will help you the next time.

CHANCELLOR and other key people:
- Be sure to share all chancellor information with Candi Agnew
- Bob Samples x5665, will prepare talking points for the Chancellor
  (and others, if needed)
• Two to three days before the event (if possible) – the Chancellor and other key people need to know what is going to happen at the event. Supply all pertinent information – in a 3-ring binder for larger events
  ~ General event page including general scenario
  ~ Detailed program scenario
  ~ Script and/or remarks
  ~ Guest list – and info about the guests, if necessary

**CONTRACTS:**
All contracts (hotels, caterers, audio visual companies) must be reviewed by Kate Jochens in Business Services or Procurement. If necessary, the contract will be sent to the UM legal department in Columbia for approval and changes. Changes will need to be initialed by the vendor and a copy returned to Kate. Don’t sign contracts on your own.

**INVITATIONS:**
Invitation envelopes look better with a printed address rather than an address label. A font that looks good is Times New Roman – 14 pt, bold, italic.

If the envelope is too small to run through the printer, use a clear laser label with the same font as above – using 12 pt to fit the label.

Invitations can be addressed to Mr. and Mrs. only if they are going to a home address – not to a business address.

**RSVP** – no periods anymore - and don’t use the word “please” with RSVP – it’s already there.

**EVENT FOLLOW-UP:**
• Send out any guest/donor photos with note from the chancellor or appropriate person
• Complete the event cost report (this may take awhile as bills may come in slowly)
• A finished event file includes:
  Event checklist
  Event info sheet
  Post-event summary
  Event cost report

FYI - Event files that are two years old or more can be sent to archives in the Thomas Jefferson Library. Before the files are sent, prepare a list of the files which includes the event name and date. Send a copy of the list with files and keep a copy for yourself for future reference. This will make it easy to retrieve the files should you need to refer to them later.
EXAMPLE OF EVENT SHEET

EVENT: Carmina Burana VIP Reception and Opening Performance

DATE: Thursday, Feb. 21, 2013

TIME: 6:45 p.m. – Tapas-style reception – Lee Theater
      8:00 p.m. – Performance – A-B Performance Hall

PLACE: Blanche M. Touhill Performing Arts Center

Mo Code S0667  Coordinator: C. Vantine x5442

Contacts: Touhill: Shelly Dotson x4921: Kim Klearman x4932
          Sodexo: Brandy Albritton x4321

Invitees: Major UMSL donors, UMSL senior administrators and representatives from the collaborating organizations: Bach Society, MADCO, Dance St. Louis, St. Louis Children’s Choir.

Guests from Chancellor’s Council new member reception (Patron’s Room) may join this event.

Room set-up: Full bar, tapas-style dinner, rounds of 7 for guest seating and high cocktail tables

Registration tables: Guests receive name tags and their concert tickets

Program:

7:15 – 7:17 p.m.  **Chancellor George**
Welcome
Introduce Jim Richards

7:17 – 7:23 p.m.  **Interim Dean Jim Richards**
Acknowledge collaborating organizations
  • Michael Uthoff from Dance St. Louis
  • Paul Vasterling - Nashville Ballet
  • Dennis Sparger - St. Louis Bach Society
  • Barbara Berner - St. Louis Children’s Choirs
  • Stacy West - MADCO
  • John Cattanach - the Touhill

End of program

7:45 p.m.  Move guests to reserved seating
8:00 p.m.  Enjoy performance of Carl Orff’s **Carmina Burana**
MORE EVENT PLANNING DETAILS

ALCOHOL USE AT UNIVERSITY EVENTS:

It is now possible to pay for alcohol for events through University accounts. The two university forms can be found on the MSC website under Accounting Service, Alcohol Policy. Form #1 Pay for alcohol with UMSL funds. Form #2 Use alcohol on campus. Both must be signed by your dean. Send signed copies to catering, keep the original in your file.

BUDGET:
First - know where the money is coming from to pay for the event. Get the account number and know who has to sign off on the paperwork.

Second - construct a written estimate of all anticipated costs and at the end include an amount for miscellaneous expenditures.

Your budget should include: room/space rental, equipment rental, audio-visual services, printed materials: (invitations, programs, maps, fliers, signage), postage, mail house costs (for mailings too large to handle on your own), food and beverages (include service fees), decorations (flowers, stage plants, other), gifts, honorarium/fees for speakers, musicians, entertainment, photographer, travel costs, movers, piano tuner, etc.

Decide where it is important to spend your money and where you can cut back.

Set up the budget with one column for estimated costs and a second column for actual costs (to be filled in as they occur).

After the event, create a final cost report for your event file. It is very helpful for future reference.

CALENDAR ISSUES:
University Advancement (Events office) maintains an internal calendar for easy reference on campus events. Check this calendar before setting a date.
FOOD SERVICE:

Catering/Caterers: UMSL has an exclusive catering contract with Sodexo. The Chancellor’s Residence and the Touhill Performing Arts Center are the only campus facilities that are exempt. Sodexo’s Catering Manager – Kim Sunde x 4324. Other caterers can be used at off-campus sites.

Menus:
Be politically correct (or at least consider the following when selecting a menu):
- Many people do not eat lamb, veal or pork
- Certain religions impose dietary restrictions – be careful if you plan to serve pork or shellfish, or meat on Fridays during Lent.
- Do you need any kosher or vegetarian meals? It is good to know ahead of time. Kosher meals must be ordered several days in advance.
- On a buffet, include foods that are low in fat for dieters and health conscious guests. Also include meatless dishes for vegetarians.

CATERTRAX: Sodexo’s online catering system: This system is very good for specific food orders you are comfortable making. Don’t be afraid to call catering for help with more complex orders, Karen Birg, x 4321.

The location of an event may dictate what the caterer can do well in that location (far from the kitchen? etc) Listen to the chef - if he/she is reluctant to try something, consider choosing something else.

Determine extra fees ahead of time in addition to the food cost: At hotels - tax (even though the university is tax exempt we still have to pay city tax at hotels), gratuities which can be as high as 22%, bartender fee, corkage fee if you use donated wine.
On campus- delivery fees, late fees, china fees,

Food guarantees: Be conservative in your early estimates of the group size – it is easier to increase than to decrease. You don’t want to pay for more than is needed.

CHANCELLOR’S RESIDENCE:
The Residence (# 9 Bellerive Acres) is used occasionally for campus entertaining at the Chancellor’s discretion. These are occasions hosted by the Chancellor and Dr. Harbach. The residence cannot be used as a “rental facility.”

CHECKLISTS:
Use checklists as you go along so someone else could figure out what is going on in case you become “indisposed.”

EQUIPMENT NEEDS:
Coat racks, banners, flags, etc.
**FOLLOW-UP:**
After each event fill out an event summary and prepare a cost report. Send photos and “thank you” notes to attendees, if appropriate.

**GIFTS:**
We use the John Pils print of the campus for many occasions but often a gift will be purchased specifically for an event.

**INVITATIONS:**
Don’t forget to identify the campus with the appropriate logo!!! Printed materials need to be Ok’d before going to print. Always have someone else proof your work. And all print jobs need to go through the UMSL Print Shop

**Guest lists** – The best source of alumni and donor lists is the university Development Systems office (Chris Burwell, 107 Woods Hall, x 5449) Your unit/department’s advisory boards and committees should also be included in the Development Systems database. Chris can combine lists and eliminate duplicates, run alpha or zip codes lists, create address labels or address envelopes (you need to supply labels and envelopes), and for large mailings – can electronically send all the data to a mail house or a printing service and the pieces can be addressed there and prepared for mailing.

**Addressing:**
Addressing UM System curators – The Honorable Joe Smith.
The salutation would be Dear Curator Smith

Addressing elected officials – The Honorable Mary Jones
The salutation - Dear Representative Jones
Dear Mayor Jones

Addressing the clergy – The Reverend James Brown
The salutation – Dear Father Brown (Roman Catholic, Episcopalian)
Dear Pastor Brown (Lutheran)

**Maps** – include maps when needed to designate venues and parking locations. Maps can be found on the campus website, the campus phone book or ordered from the print shop with advance notice.

**RSVPs** – Invitations should ask for an RSVP (reply). As a general rule, RSVP deadlines should be at least one week prior to the event. This will allow for last minute adjustments, follow-up calls, etc. For large food events, the caterer will tell you exactly when you need to give them a final count. In general, give a guarantee that is a little lower than the number you expect.
LISTS – Department lists should be housed and maintained in the Office of Development Systems in the Advance database (Chris Burwell, x5449 or burwell@umsl.edu). This includes external advisory boards, community groups, donor contacts, external colleagues, alums, etc. Any time you get new information about any of your constituents, send it to Chris for updating. (We don’t know if someone dies unless we’re told!)

MAILINGS – for large mailings we often use a mailing house. KD Direct Marketing is one that is reliable.

MOVERS – Dodge Moving (Mayflower) is the contracted campus mover – contact number 314-344-4300

NAME TAGS – There are UMSL name tags available through the UMSL Print Shop or through the University Events office with advance notice.

PHOTOGRAPHER – campus photographer is August Jennewein x 4296 (there is a fee)

PRINTING – Use the UMSL Style Guide as your foundation when creating invitations, flyers, etc. Print jobs must run through the UMSL Print Shop.

PUBLICITY – don’t wait until the last minute! Contact Ryan Heinz at x6690

RENTALS – if it is a large event, it is probably best to get bids.

ROOM RESERVATIONS (CAMPUS)
Room diagrams: Prepare a room diagram for your event. It does not need to be to scale but it needs to be realistic. Know the capacity of the venue. Be sure to check the set-up enough in advance so that changes can be made in case the setup people viewed your diagram differently than you intended.

SCENARIO/EVENT FLOW
It is helpful for everyone planning and assisting the event to have a timeline. Start with set-up times, time staff or volunteers report to the event, time set-up is to be complete, when guests begin arriving, the program schedule and estimated end time. Include all necessary details such as: who the staff or volunteers report to and what their jobs will be; when deliveries will be made and the contact number for those vendors in case they don’t show up.

As you plan the event, walk through it in your head as if you are a guest. What will you see? How will you be greeted? Etc.

The day of the event, arrive at the site early enough to make any necessary changes before your guests arrive. Notice what your guests will see when they arrive– ugly trash cans? A chair with torn upholstery? A centerpiece with a broken flower – or worse? A floor that needs vacuuming? Tables too close together? Or many other possibilities……
Arrive at the site early enough so you can correct these things (or have them corrected).

**Script** – Who is writing it? Who is proof-reading it? How detailed does it need to be? Who needs to have it ahead of time?

**Seating arrangements** – should be decided a couple of days before the event – but not too far out because changes will always occur.

**SECURITY/POLICE (INSTITUTIONAL SAFETY)** – contact Chief Forrest Van Ness x 6680 or Captain Charles Roeseler, x 4192

**SIGNAGE** – campus signage can be displayed by Parking/Transportation using signs made in the Print shop given proper advance notice.

**TIMELINES** – work backwards from event date determining key deadlines.

**UNIVERSITY EVENT EQUIPMENT** -
- UMSL banners, flags, media press box, UMSL name tags, easels
- Some decorations

**WHO DO I TALK TO ABOUT?**

- Event Consultation: University Events: Cindy Vantine x 5442
  Amanda Wilens x4898
- Space: MSC & JCP: Stan Holmes x 5264
  PAC: Shelly Dotson x 4927
- Food: Campus Catering: Sodexo: Kim Sunde x 4324
  Karen Birg x 4321
- Chancellor’s Residence: Candace Agnew x 5254
- Parking: Captain Charlie Roeseler x 4192 or Sandy Ray x4192
- Audio-visual: MSC & JCP: Dorian Hall x 5573
- Publicity: Marketing & Communication: Ryan Heinz x 6690
- Lists: Development Systems: Chris Burwell x 5449