

UNIVERSITY EVENTS PROTOCOL

The University Events team, under the umbrella of Advancement, works to produce and manage high quality events for our clients, providing the presidential standard of hospitality for each of Pepperdine's unique and diverse schools and departments.

University Events is a client service department that provides excellence in management for Pepperdine University events of campus-wide significance, including graduations, galas, conferences, dedications, major donor events, high profile events involving dignitaries, and all functions executed by the Office of the President. With each event produced, University Events seeks to create a sense of community and convey the university's mission of purpose, service and leadership.

1. Prior to scheduling the date of your event, please submit all event requests to:
Tami McKelvy – Assistant Vice Chancellor, Events and Advancement Initiatives
Valerie Vollmer – Senior Director, University Events
2. If submitted event request meets the below criteria, we will work with client office to schedule a date that works for client, events office, and all other mandatory guests (i.e.: University administrators, key event donors, or other event VIPs.) *Please note all planning guidelines are subject to current regulations related to Covid-19 county and University Protocols. See University website for most up to date information: <https://www.pepperdine.edu/coronavirus/>*
3. There may be times when the President's office will make the determination on a case-by-case basis when University Events will be assigned to lead and manage all aspects of a special event for the University, regardless of the venue they are being held at. Such examples would be, but not limited to: *an event with high profile dignitaries involved; events that involve the entire University community on a large scale; concerts and/or high profile entertainment/celebrities; media related/televised events.*

Event Criteria

- o **Will the President be involved?** All events hosted by the President have an event manager assigned automatically. Major events featuring the President or other high profile public figure on the program might qualify as one where an event manager would be assigned.
- o **Is the event a fundraiser?** If yes, is there a segment of the event celebrating the culmination of a fundraising project exceeding \$25,000? Note, if a special interest group was gathering to launch a project, it would not necessarily warrant an event manager.

- **What is the anticipated guest count?** If we anticipate over 200 people, an event manager could be considered, but would be the main contact involved in all planning stages. Again this would be based upon the calendar, availability, and all other criteria.
 - **Who is the audience/who will we invite as guests?** If a small group of 50 members of the George Pepperdine Society were to be invited to a dinner with the President, an event manager may be assigned.
 - **Is there flexibility in scheduling dates?** If the event appears to "qualify" but conflicts with a very full event calendar, it could be declined. If the same event was moved to a time of year when the event schedule was lighter, that event would be accepted.
4. After event date is scheduled, the event assistant will enter the date on the Event Calendar and the University Master Calendar (only if it meets the criteria to be posted on the Master Calendar).
 5. An event manager will be assigned to the event and they will be the client's main contact from that point forward. The assistant vice chancellor, senior director, and or assistant director will guide and assist the manager throughout the planning process.
 6. After an event manager is assigned to the event, they must be involved in the following procedures:
 - **Filing of Social Services Permit**
 - If event is a fundraiser, event manager will file a Notice of Intention with the city
 - The city will then send the event manager a Social Services Permit for the event
 - After event conclusion event manager will file a Report of Results with the city
 - All forms will be stored in the event binder
 - Copies will be submitted to client office upon request
 - **Creation of Event Timeline**
 - Event manager will create a listing of all "To Do's" and who is responsible for each
 - Manager will submit timeline to client and make sure all parties are in agreement
 - This should also include a "Day of" or "Load-in" schedule so that nothing is missed the day of the event. *(This portion may not be done until the week of the event since things change up until that time.)*

- **Creation of Event Binder**
 - Manager will file and store all pertinent documents and have binder handy for reference
- **Creation of Event Cost Proposal**
 - Manager will prompt client office for event budget and account number
 - Manager can take overall event budget and allocate it to event elements as needed OR Client office can allocate budget to event elements
 - Event manager can advise on best allocation
- **Event Elements (Please refer to following section)**

EVENT ELEMENTS

- Manager will be responsible for initiating discussion and clarifying needs for all of the following possible event elements.
- Manager will facilitate and finalize all applicable event elements.
- If it is decided that the client office will facilitate or finalize any of those elements themselves, it is imperative that they work in conjunction with the event manager on all details relating to the following event elements. (i.e. copied on pertinent emails, included in applicable meetings, etc.)
- **It is important for event managers to have the answers to any question with which they are approached, whether during the planning stages or day of the actual event.**

PRINTED/ONLINE PIECES/MARKETING

- Save the Date
- Invitation
- Printed Program
- Sponsorship or Auction Book
- Other

Event Manager Duties

- Responsible for asking client which pieces are applicable to given event and for offering their expertise in this area
- Generally works directly with Integrated Marketing & Communications (IMC), on behalf of the client office to facilitate this process.
- Responsible for scheduling and attending meeting between IMC and client department to discuss overall project and make sure all pieces can be created and printed within the given budget. If either client department or IMC cannot

meet, the Event Manager will relay client department's needs and wishes to IMC and vice versa.

- Responsible for obtaining timeline from IMC and relaying specific deadlines of project to client office
- Responsible for prompting both client office and IMC prior to deadlines to make sure they are met.
- Responsible for routing project for appropriate proofing and approval, including approval by University Editor (IMC)
- Responsible for opening up Workfront request form

Client Office Duties

- Draft budget for printed pieces and convey to manager
- Supply all written copy for printed pieces (If this goes directly from client to IMC, event manager must be copied.)
- Convey ideas and thoughts relating to theme of event
- Edit and approve proofs for project, including design and text (Make sure all printed materials are sent to event manager to look over before they go to print)
- Get proper approvals (*i.e.: Dean, Administrator, Director of department etc.*)

EVENT VENUE

- Location at which event will be held, whether on or off campus

Event Manager Duties

- Responsible for offering event locations, both on and off campus, based on size, program, meal service, audience, and style/design of event & budget
- Responsible for voicing expertise if client's venue preference is not the best option for specific event based on the above attributes, but will adhere to client's wishes if persistent after hearing all concerns
- Responsible for reserving chosen venue, making sure it is available and confirmed for appropriate days and hours (*including set up/tear down time*), and that it meets all needs of event
- Responsible for reviewing any contracts or reservation forms drafted by outside venues, making suggested changes to serve both the University's and client's best interest, and routing for appropriate approval signatures
- Responsible for obtaining all permits, insurance, and approvals pertaining to venue location

Client Office Duties

- Draft budget for event venue and convey to event manager
- Convey needs and any preferences to manager so they can take into account when selecting location

VENDORS & EVENT DESIGN

Rentals

- Chairs & tables
- Linens & napkins
- Stage equipment
- Stage draping & carpeting
- Podium
- Plants or other props

Audio Visual

- Podium
- Microphone & sound system
- Entertainment amplification (live or piped in)
- PowerPoint and screens
- Backdrop for stage, photo opps, or other locations in event venue
- Stage lighting
- Pin-spotting
- Lighting for venue
- IMAG (live feed on screens)
- Audio and video recording
- Audio and video presentation

Floral

- Centerpieces
- Podium arrangement
- Check-in table arrangements
- Cocktail table pieces
- Bar arrangements
- Bathroom arrangements
- Buffet table arrangements
- Dessert or beverage table arrangements
- Stage arrangements

Photography

- Internal photographer
- External photographer
- Staged photo opportunities

Parking & Transportation

- Appropriate size lot for attendance
- Valet parking
- Self parking
- Shuttle service
- Special parking requests (*i.e.: keynote speakers, administrators, VIP guests etc.*)

- Volunteer and vendor parking

Restrooms

- Convenient location (ie: best use of space, close to water/power hook-ups, etc.)
- Size in relation to attendance
- Restroom rentals

Security

- On campus for parking or crowd control
- On or off campus for VIP guests or speakers
- General security needs
- Dignitary detail-work in conjunction with US Marshal/field office/possible contracted security involved

Radios

- Rental radios and headsets

Event Manager Duties

- Assess appropriate vendor or campus department needs of event and run them by client.
- If on-campus, event manager will submit all requests to Set-up Crew, Housekeeping, Landscaping, Moving Crew, DFS, Transit Services, and Public Safety (DPS)
- If off-campus, event manager will gather estimates from needed vendors to make sure prices stay competitive and services are accounted for in the approved event budget
- Negotiate vendor discounts when appropriate
- Make sure all campus insurance needs are met and that we have insurance certificates (COI), as well as event waivers, signed and on file
- Oversee contract negotiation, make sure payment schedule adheres to Pepperdine's Finance policies, see that all wording in contract is correct per General Counsel regulations, gather all appropriate signatures, and send to Accounts Payable with C2C req
- Submit all C2C requests and follow-up on all vendor payments
- Order all needed items from vendor or campus department and confirm order
- Schedule and confirm arrival time and location with all vendors and make sure to gather day-of contact information from each of them
- Oversee delivery, installation, set-up, tear-down, and pick-up
- Post-event, manager will follow up with client, vendors, and campus departments to make sure all needs were met
- Negotiate any refunds or discounts based on poor service or missing equipment

Client Office Duties

- Draft overall budget for event vendors and convey to event manager
- Convey needs and any preferences to event manager so they can take into account when selecting vendors and items

INVITES & RSVPS

Event Manager Duties

- Prompt client department to decide if they would like a drafted letter invitation, email invitation, or a printed invitation
- If printed and email invite is selected, schedule with IMC as indicated in PRINTED PIECES section
- Schedule invite and envelope delivery with IMC
- Forward delivery date and drop date to Automation Services or Advancement Services for mail-out
- Request to pull distribution list from Donor Relations (Andrea Lemons) area
- If letter invitation is selected, client department generally takes over the above process, but should sent to event manager to look over before printing
- If there is a cost to attend, event manager will work with client office to determine this
- If there are sponsorship opportunities, event manager will send examples of sponsorship levels from other events and work with client office to determine what these will be

Client Office Duties

- Invitation Letter
 - Draft invitation letter (or request support from Director, Advancement Communications
 - Send copy of invite letter to event manager before printing
 - Pull internal distribution list
 - Print, stuff and mail letters
- Printed Invite
 - See PRINTED PIECES section above
- Create RSVP database (Fonteva)/coordinate any mass email invite mailings with IMC and Alumni Relations
- If registration will be online, work with event manager and IMC to set this up
- Take all RSVPs
- Upload all necessary information in Raiser's Edge (event name,date, ticket prices, sponsorship levels, attendees, gifts, etc.)
- If sponsorship levels need to be added to Raiser's Edge, submit them to Advancement Gifts and Records

PROGRAM

- Outline/ROS (Run of Show)
- Participants
- Script
- Entertainment
- Video/PowerPoint Presentation

Event Manager Duties

- Can draft general skeleton of program and submit to client for input, additions, approval, but outline generally comes from client in most cases
- Give input and make sure all general program elements are met (*i.e.: invocation, breaks, meal times, length of speeches or presentations*)
- Will prompt client office to fill in program participants and confirm their participation
- Will facilitate scripting process between client office and University writers (*Doug Gillett or Marisa Sellers*)
- Will draft confirmation letters outlining details and send to all program participants along with program outline and script if necessary
- Responsible for prompting client to give entertainment needs if any
- Will book entertainment and ensure that it is within budget
- If keynote speaker is hired by client department, event manager may take over or collaborate with logistical correspondence with speaker (*including: arrival times, AV needs, event details, etc.*)
- Will make sure all AV needs are met for both program participants and entertainment
- If there are slides for the event, create basic skeleton of slideshow, and send to client with areas that need to be filled in. Once completed by client office, send to University Communications for design, and proof once design is finished.

Client Office Duties

- Draft outline of program
- Decide who should fill each role (with possible input from Advancement)
- Select and confirm keynote speakers and handle all travel arrangements and payment if necessary (event manager can also assist with this process)
- Confirm participation of all program participants
- Approve script
- Create any necessary photos/visuals that will go in to slide show (if applicable)

MEALS

- Served Meal
- Buffet Meal
- Appetizers or desserts
- Beverages

- Appropriate space for meal service
- Appropriate number of servers based on attendance

Event Manager Duties

- Responsible for getting menu selections and prices and proposing them to client
- Responsible for reserving and confirming caterer, whether on or off campus
- Responsible for ensuring quality of selections through tasting or reference
- Responsible for communicating menu selections and service style to caterer (*i.e.: served, buffet, reception etc.*)
- Responsible for communicating any linen, napkin, china, flatware, or glassware needs to caterer
- Responsible for obtaining all numbers from RSVP taker in client office and confirming those numbers with the caterer
- Responsible for scheduling seating meeting and recruiting all seating parties if necessary
- Responsible for submitting senior administrator table assignments (including table guest list) to senior administrators for approval
- Responsible for communicating seating numbers and needs to caterer

Client Office Duties

- Draft overall budget for event meals and convey to Manager
- Convey needs and any preferences to Manager so they can take into account when selecting menus and other items
- Attend seating meeting
- Approve overall seating arrangements
- Let event manager know if there are any specific dietary or physical needs for attendees

EVENT INFORMATION

- Signage
- Confirmation Letters
- Sponsor boards
- Informational packets
- Day of Packets

Event Manager Duties

- Determine signage needs and create appropriate signs
- Communicate all information to client office and program participants
- Create Load-in Schedule for all vendors and checklist for all things to do day of event
- Create clipboards for volunteers who will need day-of information
- Make name tags and place cards as needed
- Make all check in materials (including tickets and envelopes) and organize

Client Office Duties

- Draft and send confirmation letters to attendees if needed
- Create and assemble informational packets to be handed out at registration if applicable
- Prompt event manager if you need alpha dividers, table stanchions ,or other check-in materials

VOLUNTEERS

- Anyone other than event staff or client office staff working the event

Event Manager Duties

- Reserve needed event staff to work event
- Recruit and confirm other advancement staff to work various events (*ie: Founder's Day, Graduations, Savvy Chic, Law School Dinner, etc.*)
- Prompt client office to recruit volunteers for check-in or other duties as needed
- Create and distribute list of all volunteer duties
- Schedule and run volunteer meeting
- Organize and direct all volunteers day of event

Client Office Duties

- Recruit and confirm volunteers to help with check in, packet stuffing and other duties as needed
- Give names and contact information to event manager

EVENT EXECUTION

Manager Duties

- Direct all volunteers
- Schedule courier to deliver/pick up event items if necessary
- Receive and direct all internal and external vendors
- Cue program and any related A/V
- Double-check all set-up and seating
- Organize logistics of silent auction if necessary
- Touch base with all program participants and make sure they are familiar and comfortable with their role
- Organize and direct any run-throughs needed

Client Office Duties

- Work with event manager to have all necessary items brought/delivered to event
- Work with events staff and volunteers on event set-up and tear-down
- Run or work check-in table
- Run or work silent auction

- Give updates on cancellations or additions of attendees to event manager

EVENT WRAP-UP

- Things to do before binder is closed and filed

Event Manager Duties

- File all day-of documents in binder
- Send any pertinent information to, Advancement Gifts and Records office, or Donor Relations
- Follow up on all Raiser's Edge input
- Compile invoices and pay all vendors
- Put together notes on what worked and what did not work and add to binder to reference for the next year
- Draft Cost Summary and submit to client office for review
- All documents on shared Google Drive updated
- Event binder to assistant to scan (vet binder with senior event staff to be sure it is complete before scanning)

Client Office Duties

- Schedule debriefing meeting with event manager if interested
- Review and approve Cost Summary
- Close out silent auction and get auction items to winners if applicable
- Process all applicable payments/gifts related to the event