



EVENT PLANNING OUTLINE (EPO)

If you need assistance completing the EPO, please see ***Instructions for Completing EPO***.

Please submit to **Donna Gutierrez**, Director of Special Events by noon on Tuesdays.

For UHM events: In addition to submitting EPO to Director of Special Events, please send to following:

- **Martha Hanson**, Associate VP of Communications and Donor Relations
- **Mangmang Brown**, Assistant VP, International Engagement and UHM Development Operations
- **Patti Nakamoto**, Development Assistant
- **Jannelle Takebayashi**, -

TYPE OF EVENT	(Indicate all that apply)	✓
	Recognition	
	Cultivation	
	Stewardship	
	Fundraiser	
	Other	

	Yes	No
Has the event been approved by UHF President?		
If a UHM unit event, has this EPO been approved by the Assistant VP, International Engagement and UHM Development Operations?		
Will you be requiring assistance from UHF Special Events with the logistics of the event?		
Is EPO a "FYI" for calendaring purposes only?		
If an "FYI", is the unit handling logistics?		

NAME OF UNIT	
EVENT TITLE	
DATE OF EVENT	
START TIME	
END TIME	
EVENT HOST	
LOCATION	
PURPOSE OF EVENT	

DESIRED OUTCOMES	
BRIEF DESCRIPTION OF EVENT/TIMELINE	
SPEAKERS	
EVENT COORDINATOR(S) AND CONTACT INFO	
GUEST LISTS COMPRISED OF	
# OF GUESTS EXPECTED	
HONOREES/VIPS/KEY ATTENDEES	
TOP PROSPECTS FOR BRIEF BIOS	
BUDGET CAP	
ACCOUNT NUMBER	
GUEST FEE/COST	
COMMUNICATIONS PLAN	
POST-EVENT FOLLOW UP PLAN	
COLLATERAL (Invitation/ rogram	

EXPECTATIONS/NEEDS FROM CDRSE	CDRSE will assist with qualified/approved events only. Once event is approved, please indicate what assistance you will need.	✓										
Communications	Design save the date cards											
	Design invitations											
	Design map											
	Design signage											
	Design of program											
	E-blasts											
	Media alerts											
	Photography											
	Videography											
	UHF website											
	Other											
	Donor Relations	Donor gift										
Prepare gift agreement												
Recognition Plaque												
Recognition Certificate												
Other												
Special Events	Mailings – save the date/invitations/event reminders											
	Take RSVPs											
	Set-up online registration											
	Process event registration payments											
	AWA Entry - RSVP/registration/post-event participation											
	Name tags											
	Place cards											
	Table tents											
	<p>Brief bios (Identify the key people who you want leadership to connect with, to focus on and interact with at this event. Please focus on new people that leadership does not know or do not know well.) Narrow down to approximately 10 people:</p> <table border="1"> <tr><td>1)</td></tr> <tr><td>2)</td></tr> <tr><td>3)</td></tr> <tr><td>4)</td></tr> <tr><td>5)</td></tr> <tr><td>6)</td></tr> <tr><td>7)</td></tr> <tr><td>8)</td></tr> <tr><td>9)</td></tr> <tr><td>10)</td></tr> </table> <p>This will help you think how you want to move your prospects down the line towards a gift and alerts leadership of your event strategy.</p>		1)	2)	3)	4)	5)	6)	7)	8)	9)	10)
	1)											
2)												
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7)												
8)												
9)												
10)												

Special Events, continued	<i>Logistical Coordination:</i>	✓
	Audio and Visual	
	Decorations	
	Equipment – tables/chairs/tents/linen/stage/misc.	
	Event execution	
	Favors	
	Food and Beverage – menu/headcount/service	
	Leis	
	Parking arrangements	
	Recommendations – vendors/hotels/restaurants/misc.	
	Set-up – floor plan	
	Stage management	
	Supplies (please specify)	
	Transportation for groups – shuttles/bus/trolley, etc.	
	Travel coordination for individuals – air/hotel/car	
	Venue – reservation/working w/venue staff on set-up	
	Volunteers – recruit/assignments	
	Other	
	<i>Special Event Documents/Samples Available on Intranet</i>	✓
	Detailed Task Timeline	
	Event Briefing	
	Event Budget	
	Event Planning Outline	
	Event Planning Checklist	
	Event Supply Checklist	
	Floor Plan	
	Fundraising Event Deductibility Worksheet	
	Fundraising Event Transmittal for Contribution	
	Gift Agreement Signing Ceremony Checklist	
	Guests to Invite Checklist	
	Invitation	
	Name tag template	
	Place card template	
	Post-event evaluation	
	Save the Date	
	Seating Chart	
	Table tent template	
	Table assignment template	