



**University Advancement Special Events**  
**Intake Meeting**

Meeting Name: \_\_\_\_\_

Date(s): \_\_\_\_\_

Meeting Attendees:

Part 1: \_\_\_\_\_

Part 2: \_\_\_\_\_

**PREAMBLE**

**THE PERSON/GROUP PLANNING THE EVENT SHOULD THINK ABOUT AND ANSWER THESE QUESTIONS IN ADVANCE OF THE MEETING**

1. In the context of before the pandemic, what do we miss and long for as it relates to events? What are we fighting to bring back? And on the other hand, what are we relieved we haven't needed to do? What do we want to discard for good?
2. What did we learn, create, or try anew during the pandemic that we want to bring with us?
3. What might we invent going forward?
4. What behavior is happening within our target audience?
  - a) Is it desirable?
  - b) Do we need to reinforce it?
5. What behavior do we want to happen?
6. What is the new need of the community associated with this event?
7. What are we not doing? What should we be doing?

**PART I: COMMIT TO GATHERING ABOUT SOMETHING**

Let purpose be your bouncer

**PLEASE ANSWER THE FIRST TWO SECTIONS ON YOUR OWN AND WE WILL WALK THROUGH THEM IN THE FIRST MEETING TO MAKE SURE EVERYONE IS CLEAR ON THE PURPOSE, FOCUS AND AUDIENCE.**

1. **What is the specific larger issue or challenge we are addressing through this gathering?**  
Specificity is a crucial ingredient. The more focused and particular a gathering is, the more narrowly it frames itself and the more passion it arouses.
2. **What is the specific purpose for gathering in this way at this time? Why, why, why?** We should keep asking ourselves why we are doing an event until we hit a belief or value. Think about what larger needs in the world this gathering might address. What problem might it help solve?

Gathering Type	Your purpose is a category (i.e., you don't have a purpose).	Basic, boring purpose, but at least you are trying	Your purpose is specific, unique, and disputable (Multiple alternatives. Pick one)
Company offsite	To get out of the office together in a different context	To focus on the year ahead.	<ul style="list-style-type: none"> <li>• To build and to practice a culture of candor with one another.</li> <li>• To revisit why we're doing what we're doing and reach an agreement about it.</li> <li>• To focus on the fractured relationship between sales and marketing, which is hurting everything else.</li> </ul>

3. **What is our desired outcome for this gathering?** This allows people to make better choices about whether they need to be there.
  - a. Has a WIIFT been established? ("What's In It for Them"—our constituents): Builds or reinforces community, creates an experience, and/or connections for and to our constituents and, our internal stakeholders.
  - b. Event goals and measurable outcomes.  
Please consider how this event aligns with our divisional goals and the campaign. (Answer should go beyond it supports the success of the campaign or it will build the pipeline). This will be included in the "Goals" section of any briefing documents (e.g., President, Provost, etc.).
4. **What do we want to walk away with?**
5. **What kinds of connections do we want to create?**
6. **Given our purpose for gathering, what do we need to shift or change about the way we come together to meet our goals?** How does the way we typically gather need to change? What do we need to add to, or subtract from the gathering? How might we do things differently?
7. **How does this event stick its neck out a little bit? Does it take a stand?**
  - a. **Is it as specific as we can get it?**
  - b. **Is it unique?** Why is this gathering different from all other gatherings of this general type? What is this that other gatherings aren't? (In our organization? In other organizations?)

- c. **Is it disputable?** Does it take a stand? Does it have a disputable perspective? Can we name multiple alternatives to the purpose of the gathering? – PICK ONLY ONE!

## PART II: WHO IS THIS FOR AND WHO NEEDS TO BE INCLUDED?

We will have begun to gather with purpose when we learn to exclude with purpose...The thoughtful gatherer understands that inclusion can in fact be uncharitable, and exclusion generous. Discussion centered on who needs to be included/invited to help meet the goals of the event.

1. **Who is this for?** Who is this gathering for first? Who not only fits but helps fulfill the gathering's purpose?
  - What is the audience profile (e.g., their giving history, engagement history, etc.), and have we done an analysis, or does an analysis (e.g., clipboard report, capacity rating) need to be done?
2. **Who is this not for?** Who threatens the purpose? Who despite being irrelevant to the purpose, do we feel obliged to invite? (In trying not to offend, we fail to protect the gathering itself and the people in it... how can we bound the gathering in a way that allows the diversity in it to be heightened and sharpened, rather than diluted in a hodgepodge of people.)
3. **Whom should we invite and why?** What is the match? Are they wanting to attend for the right reasons? Do they really have a genuine interest in connecting with this community/gathering/purpose? (With certain types of gatherings, over-including can keep connections shallow because there are so many different lines through which people could possibly connect that it can become hard to meaningfully activate any of them.)
4. **Who needs to review the invite list?** (e.g., team members from other UA departments)
  - Who needs to be included on the weekly registration reports and/or have access to the parked registration reports?
5. **Who needs to be included to get us to our desired outcome?**
  - a) Is there an event host(s)?
    - i) Yes
      - (1) If yes:
        - (a) First Name, Last Name, Class Year (if applicable) and/or Campus Department, email, and phone number
        - (b) What are their expectations?
      - ii) No
    - b) Do we need a host committee?
      - i) If yes, what is their role? What will they be responsible for?
      - ii) What is the target goal for the number of committee members?
      - iii) How will their success be determined?
    - c) Are there stakeholders outside of University Advancement? If so, who are they?

- d) Does this event require the President, Provost, LMU Cabinet Member(s), Board of Trustee(s), or Regent(s) to be involved?
  - i) What is the scope of their involvement?
- e) Does the event require a:
  - i) Speaker (could be a professional speaker, a donor, alumni, parent, etc.)
    - (1) If yes, who?
  - ii) Panel
    - (1) If yes, who?
  - iii) Talent
    - (1) If yes, who?
  - iv) Other
  
- f) Will students be involved?
  - i) If yes:
    - (1) Who?
    - (2) Who will recruit?
    - (3) Should CPD be involved in prepping the students for the event (interacting with alumni, donors, prospects, parents, trustees, regents, industry leaders, etc.)?

### **PART III: HOSTING (FOR SPECIAL EVENTS)**

If we don't establish and enforce our purpose, direction, and ground rules, others will step in and enforce their own purposes, directions, and ground rules. If we compel people to gather in a particular way, enforce it and rescue our guests if it fails. Generous authority is a commitment – we must sustain the protecting, equalizing, and connecting of guests throughout our event.

1. **Who (in our case it could be several people) will host and guide the event with generous authority and how?** Generous authority is imposing in a way that serves our guests and helps them have the best experience of our gathering while protecting them from potentially unwanted experiences.
  
2. **What do we as hosts need to consider in order to protect our guest's experience at our gathering?**
  
3. **How can we as hosts equalize our guests at our gathering?** How might we set ground rules and our world to help do this? (Ex. Name tags with only first names, a rule that we can't talk about work, perhaps – political discourse free zone?)
  
4. **How will we as hosts connect our guests to one another?** We must design our gatherings for the kinds of connections we want to create... (Ex. "water minister," "make two new friends," 60-second sharing rule)

### **PART IV: THE LOGISTICS**

#### **1. Scheduling Considerations:**



**Please note the following production timelines for UA Special Events**

**Intricate Events:** (Alumni Weekend, Wine Classic, Family Weekend, I AM LMU, etc.): Proposed event date is 9 – 12 months from today.

**Standard Events:** Proposed event date is 4 months from today.

**Urgent Events:** (Defined by the President or UA Executive Team): Proposed event date is 6 weeks from today.

**2. Event date?**

**3. Event Time?**

**4. What is the proposed event location?** (e.g., Los Angeles, out of state, etc.)

a) What is the max capacity for this event and does it align with the locations' max capacity?

**5. Event fee**

a) For Paid Events

i) What is the revenue budget number?

ii) Will ticket sales impact the budget (e.g., meaning if ticket sales are low, the overall budget for the event will decrease)?

iii) Is the fee attached to a fundraising goal?

(1) Yes

(a) If yes, what is the goal?

(b) Do we need to build sponsorships?

(2) No

b) What area should registrants have the option to give toward (e.g. LMU's Greatest Needs, LMU's Student Scholarship Fund, Lions Athletic Fund, etc.)? List fund name or allocation code (max 3).

c) Does a giving option need to be added to:

i) Confirmations

ii) Thank you emails

d) Does an ask need to be built into event programming?

i) Included in talking points

ii) Through signage (i.e., table tents, etc.)

**6. What is the target attendance goal?**

a) Are invitees allowed to bring guests?

i) If yes, how many guests per primary registrant?

**7. Will you require nametags?**

a) If yes, what needs to be included (e.g. class year, school or college, affiliation, etc.)

**8. Will you require hosted parking? (Reminder: Parking is free on weekends)**

a) If yes, would you like a parking validation code for all attendees **and/or** reserved/blocked-off parking spots for VIP's? (\$15/validation code used; \$45/reserved spot)

**9. Do guests and/or the event host need to be given a gift?**

- a) Yes
- b) No

**10. What is the proposed budget? If the questions wasn't answered on the Event Request Form**

- a) What is the expense budget code(s)/number(s)?

**Marketing Strategy**

**PART V: PRIMING OUR EVENT**

Before our event starts, it has begun.

- **How will we host from the moment of discovery?** How can we focus during the “pregame” window on preparing human beings and not just logistics? From the moment someone receives an invitation the journey has begun, how we host them in advance will shape how they show up to the gathering. We need to attend to our guests during the pregame window in proportion to the risk and effort we are demanding of them. The pregame should sow in guests any special behaviors we want to blossom right at the outset of the event. (Ex. Send an article, testimony, video clip, ask people to bring something to contribute, fill out a questionnaire, bring a story or questions)
- **How does the title reflect the specific purpose of our event?** To name a gathering affects the way people perceive it; its purpose and what is expected. Names help guests decide whether and how they fit into the world we’re creating. (Use image, video, etc. to signal the tone and mood we are gathering for.) Titles can also be a helpful way to generously exclude. (e.g., Bring your single friends and leave those strollers at home.)

**THE EVENT NAME:** \_\_\_\_\_

\*Please note that this is the official event name that will be listed on the invite, registration page, event landing page, etc.

- **Is there a graphic/image to include on the invite and event landing page?**
  - If yes, who is providing this image?
- **How can we continue to kindle interest and enthusiasm after the invitation?** Create a good list of convening questions: Something that helps the person connect with and remember their sense of purpose as it relates to the gathering. Something that gets them to share honestly about the nature of the challenge they’re trying to address.
- **List external marketing and communication channels** (e.g., Save the Date and/or invite, ads, social media advertising or promotion, etc.), as well as **Scope of work for each channel** (e.g.,

design, copywriting, quantities, dimensions for each, etc.)

- a) **Mailing parameters/specifications** (e.g., brochure, postcard, video mailer, a custom piece, etc.) Special Events - Please bring examples to the meeting
- **List internal marketing and communication channels** (e.g., electronic Save the Date and/or Invite, Loyolan article or ad, LMU This Week, LMU Magazine article, alumni, parent or schools/colleges e-newsletters, LEO, digital advertising, LMU event calendar, The Pride for mentoring and/or networking, Zoom backgrounds, etc.), as well as **Scope of work for each channel** (e.g., design, copywriting, quantities, dimensions for each, etc.)
- **Mandatory Requirements** (e.g., logo, taglines, colors, key messaging, etc.)
- **Who needs talking points?**
  - a) **Who will be responsible for crafting?**
- **Who (what name) should email communications (e.g., invitation, reminders, etc.) come from** (e.g., The Office of the President, The Chairman of the Board, Peter, UA, The Alumni Association, Donor Relations, etc.)?
  - a) **What email address should the emails come from?** (e.g. [events@lmu.edu](mailto:events@lmu.edu), [alumni@lmu.edu](mailto:alumni@lmu.edu), [donorrelations@lmu.edu](mailto:donorrelations@lmu.edu), etc.)
- **Post-event communications strategy:** In addition to a Thank You email sent to attendees post-event, will it be necessary to send an email to those who registered but did not attend, and/or those who were invited but did not register/attend?
- **Photography requirements** (e.g., is there a photography budget, type of photos, photo usage, etc.)
  - a) **Would you like to include a link to the Flickr album in the Thank you?**
  - b) **Who will be assigned to develop the Flickr album?**
- **Videographer requirements** (e.g., is there a videographer budget, type of video(s), usage, etc. Will it require music, hair, makeup, etc.?)
- **Working timeline/key milestones** (e.g., Production schedule, review process, approvals, etc.)
- **Media** (Will there be media expected at this event? Do we need a press release/media alert? Will there be any one notable attending that we need to know about in advance? Would notable attendees/speakers be open to press?)
- **Which internal constituents need to be updated?** (e.g., UA departments, President's/Provost's Offices, Student Affairs, Admission, etc.)



- **Reviewers and Approvals** (who needs to review/approve, include legal if necessary)

## VI: ASSIGNMENTS

Date entered in Smartsheet

At the conclusion of the meeting(s), the following roles should be identified:

- a) Timeline Developer(s) \_\_\_\_\_
  - b) Event Team \_\_\_\_\_
  - c) UA Partner(s) \_\_\_\_\_
  - d) Designer \_\_\_\_\_
  - e) MarComm Lead \_\_\_\_\_
  - f) Smartsheet Copy Approval Flow\* \_\_\_\_\_
- \*list from first to final approver: Who is the top leaf - who is the final decision maker for this event? This person will be the final approval for all text, invite list, invite, production information, etc.*
- g) Data Request \_\_\_\_\_
  - h) Reg Build \_\_\_\_\_
  - i) Approvers \_\_\_\_\_
  - j) Flickr Album \_\_\_\_\_
  - k) Photographer \_\_\_\_\_
  - l) Videographer \_\_\_\_\_
  - m) Other \_\_\_\_\_