Cal Poly + Events

How to Plan a Campus Event
Getting Started

What’s an Event?
An event is any planned gathering including but not limited to celebrations, dances, lectures, forums, performances, rallies, social gatherings, concerts, speaker presentations, and conferences.

Goals:
• Positive customer experience
• Safe environment
• Preserve teaching and learning environment
• Promote learning opportunities for faculty, staff, and students
Getting Started

Scheduling Entities
(Points of Entry)

- Cal Poly Athletics
  Intercolligate Athletics

- Student Affairs
  Dean of Student: DoS Student Programming

- Performing Arts Center / Spanos
  Performance groups requesting use of the Christopher Cohan Center or Spanos Theatre

Extended Education

- Conference & Event Planning
  Co-sponsored or Sponsored Events

- University Scheduling
  Academic/Admin Departments
  Instructionally Related Activities

- Associated Students, Inc.
  Recognized Student Organizations (RSO's)
  Fraternities
  Sororities
  Clubs
  ASI Sponsored Events
  Student Government
  Club Sports
  Intramural Sports

University Space Management System (25Live)

- University Lecture Spaces
- Department Managed Spaces
- Performing Arts Center (Cohan Center)
- Rec Center/ MAC
- University Union
- Sports Complex
- University Master Calendar
  (https://events.calpoly.edu/)
  - Campus Life: Event is open to the campus community
  - Community Events: Event is open to external participants
  - Diversity and Inclusion: Events related to diversity and inclusion efforts occurring throughout campus.

- Mott Athletic Center
- Advanced Tech Lab/ Bonderson
- Davidson Music Center
- Outdoor Locations
- Housing Venues
- Dining Venues
- Kennedy Library
- Outlook 365 (Conference Rooms)
Recognized Student Organizations
• Student Affairs/ASI ePlan | Cal Poly Now
https://clubs.calpoly.edu/

External Entities | Departments Hosting with External Entities
• Conference & Event Planning

Academic or Administrative Department Host
• University Scheduling
https://academicprograms.calpoly.edu/content/IRA/index

Instructionally Related Activities
• University Scheduling
https://academicprograms.calpoly.edu/content/IRA/index

Freedom of Expression Activities
• University Scheduling
https://eventscalendar.calpoly.edu/free-speech

*Organizations not found on RSO or IRA pages* - Cannot be scheduled. A group must be approved by the university to use university facilities and services.

*CAP 144:* https://policy.calpoly.edu/cap/100/cap-140#cap-144
**Major Event**

• Over 200 persons are anticipated to attend;
• Authorized campus officials determine that the event requires ticketing or entry by invitation only;
• Authorized campus officials determine that the complexity of the event requires the involvement of more than one campus administrative unit;
• Authorized campus officials determine that the event is likely to significantly affect campus safety and security (based on assessment from the CPPD) or significantly affects campus services (including, but not limited to, kiosk attendants, parking, service roads, or vehicular or pedestrian traffic);
• Authorized campus officials determine that the event has a substantial likelihood of interfering with other campus functions or activities;
• The event is a concert or dance, regardless of how many attendees;
• Alcohol is intended to be served or consumed; or
• Outdoor amplified sound will be used.

An academic or administrative department is required to work through Conference and Event Planning when co-sponsoring a Major Event with a non-departmental user or authorizing use of its facilities under its control for events sponsored by a non-departmental user.

CAP 144: [https://policy.calpoly.edu/cap/100/cap-140#cap-144](https://policy.calpoly.edu/cap/100/cap-140#cap-144)
Why?

• Means to manage intake process and allow for consistent customer service and experience

• Limited resources and a very active (and growing) campus community.

• Groups should not go direct to venue managers - in addition to reserving a space, there are a variety of other factors associated with an event that must be taken into consideration before an event can be confirmed

• Stewards of university resources and facilities

If a group is charging registration fees, bringing off campus attendees, using the Cal Poly brand to promote their external organization, additional university oversite is required.
  • A “free” event is not always “free”
How to Submit

• RSO - student groups submit their request via Cal Poly Now
• CEP - email cep@calpoly.edu
• University Scheduling - https://registrar.calpoly.edu/universityscheduling/request

General Information:
Minimum turnaround for campus space is a 3-day lead time with some locations requiring longer
• If under that lead time an event will be denied - there must be adequate time to respond and support a space reservation. Factors such as unlock, cleaning schedules, maintenance schedules could be impacted if not complying with lead time.
• Groups should not go direct to venue manager if denied - Plan Well and Plan Early!
• Gentle reminder groups should not ask other groups to relocate their event.
University Scheduling
Clubs & Organizations
Conference & Event Planning

Michele Kekaha | Sarah Hawkins | Erin Scherer
University Scheduling

- Work with academic and administrative departments as well as IRA's to reserve space on campus

- Functional administrator for 25Live, campus space tool
  https://eventscalendar.calpoly.edu/location-availability

Contact: events@calpoly.edu
  Hector Mendoza, Cesar Galvez, Vicky Myers

Website: https://eventscalendar.calpoly.edu/

How to Use 25Live
  Thursday, May 16
  10:10am - 11am
  Zoom: https://calpoly.zoom.us/j/84051009348
Our Team

- Erin Scherer, CEP Director
- Tammy Farrell, Sr. Accounting Analyst
- Scott Homolka, Sr. Conference & Event Coordinator
- Carol Ertani, Conference & Event Coordinator
- Lynda Mantle, Conference & Event Coordinator
- Elizabeth Beckett, Event & Project Coordinator
Our Vision
“Cal Poly Conference and Event Planning embodies a commitment to excellence that electrifies every event we undertake.”

Conference and Event Planning’s goal is to exceed expectations by providing the very best in planning and services for individuals or large groups to experience Cal Poly!
Who We Support

- Overnight Summer Programs
- Department Sponsored Events
- Academic Conferences
- External / Third Party Clients
- Mega Events
- Live Events
Suite Of Services

- Customized client experiences
- Facility management for Cal Poly Partners
- Development of event budgets
- Comprehensive registration and reporting services
- Coordination of on-campus facilities, including housing accommodations
- Management of food and beverage services
- Coordination of off-campus facilities and hotels
- Provision of on-site event staffing
- Arrangements for liability insurance and related services
- Administration of payroll services
Additional Services

Conference and Event Planning will help you coordinate most aspects of your event. We are happy to provide recommendations for additional services that are not provided by CEP.

- Audio Visual Support
- Printing and Graphic Design Services
- Auctioneer Services
- Collection and Storage of Auction Items
- Marketing services and Advertising the Event
- Script writing
Student Clubs and Organizations

Sarah Hawkins
Student Clubs and Organizations

- The club (RSO) event planning process is changing, effective 2024-25.
- The ASI E-Plan is managed by ASI Facility Scheduling (asieplan@calpoly.edu)
- Cal Poly Now is managed by Cal Poly Clubs & Organizations (clubs@calpoly.edu)

- Club finances are managed by ASI Club Services (asiclubservices@calpoly.edu)
- RSOs follow most of the same event planning guidelines that will be shared today, but we provide more hands-on support to get them through the planning process.

<table>
<thead>
<tr>
<th>GROUP/EVENT TYPE</th>
<th>REQUIRED PROCESS(ES)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Clubs – On-Campus</td>
<td>ASI E-Plan AND Cal Poly Now Event Request</td>
</tr>
<tr>
<td>All Clubs* – Off-Campus</td>
<td>Cal Poly Now Event Request</td>
</tr>
<tr>
<td>*FSL Only – Off-Campus</td>
<td>Cal Poly Now Event Request AND FSL Event Registration</td>
</tr>
<tr>
<td>Activities with Alcohol</td>
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</tr>
</tbody>
</table>
Risk Management

Risk Manager: Mike Morgan 6-6755
Risk Analyst: Emily Rutherford 6-5455
website: https://afd.calpoly.edu/risk-management/
Special Events - Assessment

**Risk Assessment of Event**
- Risk Assessment Tool and Matrix
- Identify risks that the organization is exposed to in its operating environment
- Analyze and determine scope of identified risk
- Understand the link between the risk and different factors within the organization
- Evaluate and rank the risks for a holistic view of the risk exposure landscape

**Risk Control of Event**
- Treat risks to minimize the probability of negative risks and/or enhance opportunities
  - implement risk mitigation strategies, prevention plans, and contingency steps
- Monitor and track the effectiveness of various risk treatment programs and strategies and modify accordingly
- Use of releases/waivers, contracts with approved caterers/vendors
Special Events - New Programs

Events with Alcohol Service

- Alcohol Service Requests
- Campus Dining v. Approved Caterer v. Staff servers
- RBS certified servers

Youth Programs

- Youth serving programs (under 18 years old)
- New campus policy
- University sponsored v. third-party and overnight programs
Special Events - Risk Financing

Risk Transfer to Vendor

• Must be in executed contract
• Evidence of vendor insurance
• Contract language to trigger endorsements (additional insured, primary/non-contributory, etc.)

Special Event Insurance

• Buy down campus deductible - $500k/occurrence
• More than 100 attendees
• Open to the public
• Alcohol service
• Youth attending
• Animals or potentially hazardous activity
Procurement

- Any Service performed on campus needs to be procured via a Purchase Order (PO)
- Ensure any supplier you'll be working with is set up in CSUBUY so a PO may be processed
- Any Cal Poly event (on or off campus, including personal home) serving alcohol must fill out an Alcohol Service Request form
- Approved caterers already vetted and under PO
- Above ensure proper insurance in place.
- All Cal Poly events must abide by the University's Hospitality Policy
- Contracts/Agreements for events must be reviewed and signed by Procurement

Website: https://afd.calpoly.edu/procure-to-pay/how-to-buy-events/
Procurement Event Websites

• Approved Caterers
  https://afd.calpoly.edu/procure-to-pay/how-to-buy/events/catering/approved-caterers

• Catering an Event
  https://afd.calpoly.edu/procure-to-pay/how-to-buy/events/catering/

Contact Procurement Services:

  805-756-2232
  Sbs-procurement@calpoly.edu
Transportation & Parking Services

Takuto Doshiro | Lauren Madonna | Marlene Cramer
Event Parking

Adobe Power Form
(“I know what I want/need”)

• Guest Parking and Signage Request Form 2024
  • Reserved Spaces
  • Virtual Authorization
  • PayStation Codes
  • Signage
• 2-Signature Form (requestor & fund approver)
• Last-minute requests NOT recommended

Direct Contact
(“I don’t know what I want/need”)

• Email us at eventparking@calpoly.edu
• Any Large Event Request
  • OffStreet Events
  • ParkMobile Events
• Special Reserved Spaces
• Reserving entire Parking Lots
• Things that might require traffic control
• Questions and planning help

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# Service offerings

<table>
<thead>
<tr>
<th>Item</th>
<th>Price</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Paystation Codes</td>
<td>$12/ea (min 5)</td>
<td>A 6-digit code to be redeemed at a paystation.</td>
</tr>
<tr>
<td>Virtual Authorizations</td>
<td>$12/ea</td>
<td>Manually issued online permit. License plate information required.</td>
</tr>
<tr>
<td>Reserved Spaces</td>
<td>$18/ea</td>
<td>A physically reserved space.</td>
</tr>
<tr>
<td>Pre-Purchase Event Permit</td>
<td>$11.50/ea</td>
<td>Permits purchased online up to 3hrs prior to event.</td>
</tr>
<tr>
<td>Day-Of Event Permit</td>
<td>$15/ea</td>
<td>Permits purchased day-of event.</td>
</tr>
<tr>
<td>Walking Sign</td>
<td>$40/ea</td>
<td>Signs from parking to venue.</td>
</tr>
<tr>
<td>Driving Sign</td>
<td>$15/ea</td>
<td>Signs from campus entrance to parking location.</td>
</tr>
</tbody>
</table>

*Prices subject to annual increase.*
Please reach out

We are happy to help

- eventparking@calpoly.edu
- Lauren Madonna
  - Customer Service Coordinator, Public Safety Business Services
  - lmadonna@calpoly.edu
  - 805-756-7861
- Takuto Doshiro
  - Manager, Public Safety Business Services
  - tdoshiro@calpoly.edu
  - 805-756-6682
Facilities Operations

Don Popham
Custodial and Event Support

• Event Infrastructure Support
  • Waste management and waste container rentals
  • Event setup (2-week notice), electrical support, restroom support or rentals

• Code Compliance
  • Fire & Life Safety Permits
  • Temporary structure permits

• Building Permits:
  https://afd.calpoly.edu/facilities/forms.asp

• Website:
  https://afd.calpoly.edu/facilities/services/events
Fire & Life Safety | EH&S

• Event permits

• Food Safety
  • Temporary Food Facility Permit Required:
    • Hazardous food items (sold or given away)
  • Not Required:
    • Commercially prepared
    • Individually packaged
    • Department potlucks
    • Campus Catering doing entire event
  • PolyLearn Food Safety Training

• Website: https://afd.calpoly.edu/ehs/ and https://afd.calpoly.edu/ehs/foodsafety
Catering

1. Go to Catering Website via Dine On Campus ([dineoncampus.com/calpoly](dineoncampus.com/calpoly)) OR directly go to the Catering Website ([cpuniversitycatering.com](cpuniversitycatering.com))
2. Go to the "BOOK NOW" tab
3. Download the "EVENT PLANNING GUIDE"
4. Once the form is completed, send form to catering-request@calpoly.edu

✓ Note: Events must be scheduled minimum 1 week in advance
✓ Benefits: Full-service catering, no gratuity, no service fees, money stays on campus, delicious food, amazing service and you help to fund campus programs!

Scan QR code to view website and start an order!
Questions?
Resources

Event Planning Resource Guide: https://registrar.calpoly.edu/event-scheduling/#event_resource

Getting Started: https://eventcalendar.calpoly.edu/getting-started

Campus Policies: https://eventcalendar.calpoly.edu/event-policies

Resources & Policy: https://eventcalendar.calpoly.edu/planning-resources

Popular Locations: https://eventcalendar.calpoly.edu/location-availability
Additional resources and contact information can be found at:

<table>
<thead>
<tr>
<th>Department</th>
<th>Phone</th>
<th>Email</th>
<th>Website</th>
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</thead>
<tbody>
<tr>
<td>Office of the Registrar, University Scheduling</td>
<td>805.756.5550</td>
<td><a href="mailto:events@calpoly.edu">events@calpoly.edu</a></td>
<td><a href="https://registrar.calpoly.edu/event-scheduling">https://registrar.calpoly.edu/event-scheduling</a></td>
</tr>
<tr>
<td>Conference and Event Planning</td>
<td>805.756.7600</td>
<td><a href="mailto:conference-eventplanning@calpoly.edu">conference-eventplanning@calpoly.edu</a></td>
<td><a href="https://www.calpolyconferences.org/">https://www.calpolyconferences.org/</a></td>
</tr>
<tr>
<td>Facilities Management and Development</td>
<td>805.756.5555</td>
<td><a href="mailto:facilities-cbs@calpoly.edu">facilities-cbs@calpoly.edu</a></td>
<td><a href="https://afd.calpoly.edu/facilities/">https://afd.calpoly.edu/facilities/</a></td>
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<tr>
<td>Risk Management</td>
<td>805.756.5477</td>
<td><a href="mailto:riskmanagement@calpoly.edu">riskmanagement@calpoly.edu</a></td>
<td><a href="https://afd.calpoly.edu/risk-management/">https://afd.calpoly.edu/risk-management/</a></td>
</tr>
<tr>
<td>Environmental Health &amp; Safety</td>
<td>805.756.6665</td>
<td><a href="mailto:environmental-health-safety@calpoly.edu">environmental-health-safety@calpoly.edu</a></td>
<td><a href="https://afd.calpoly.edu/ehs/">https://afd.calpoly.edu/ehs/</a></td>
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<tr>
<td>Transportation and Parking Services</td>
<td>805.756.6016</td>
<td><a href="mailto:eventparking@calpoly.edu">eventparking@calpoly.edu</a></td>
<td><a href="https://afd.calpoly.edu/parking/">https://afd.calpoly.edu/parking/</a></td>
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<tr>
<td>University Catering</td>
<td>805.756.1177</td>
<td><a href="mailto:catering@calpoly.edu">catering@calpoly.edu</a></td>
<td><a href="https://www.calpolydining.com/catering/">https://www.calpolydining.com/catering/</a></td>
</tr>
<tr>
<td>Strategic Business Services</td>
<td>805-756-2232</td>
<td><a href="mailto:sbs-procurement@calpoly.edu">sbs-procurement@calpoly.edu</a></td>
<td><a href="https://afd.calpoly.edu/cprm/procurement">https://afd.calpoly.edu/cprm/procurement</a></td>
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