# Event To Do List

Below you will find a sample event to do list. Not all items listed will apply to your event and the list is not all inclusive, but we hope this can provide a sample timeline as you start to envision your event.

Once you have submitted the [Event Approval Form](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2f71aaebe1-7d0e-4050-8e37-3c9e15938700) and your event is approved, Student Life staff will follow up with guidance and a personalized version of this to do list to help you in your planning.

Please email [Student Life](mailto:studentlife@coastline.edu) with any questions regarding the event planning process.

## SAMPLE TO DO LIST

|  | TASK | NOTES |
| --- | --- | --- |
|  | **Brainstorm event details** using Event Planning Guide (EPG) | Optional; can work on this in any order |
|  | **Confirm availability of at least 1 club member and 1 advisor** for event setup, clean up, and facilitation |  |
|  | *If using club funding,* **get club approval for event** and note approval, details, and the projected NTE\* budget amount in the club meeting minutes |  |
|  | **Submit event idea to be reviewed for approval** at an upcoming ASG meeting | Complete [Event Approval Form](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2f71aaebe1-7d0e-4050-8e37-3c9e15938700)  Approval needed to use any funding- include all possible expenditures |
| Once your event is conditionally approved by Student Life, you will receive a notification from Student Life with a checklist tailored to your event, which may include: | | |
|  | *If a trip, larger scale event, event with more risk than usual, or event with costs not included in existing Student Life Board Item*, **submit Board Item** through Teams\*\* | At least 2 weeks before event date  [Teams Approvals user guides & resources](https://teams.microsoft.com/l/channel/19%3ab838287809c74b31af2e2a0a6872fcc3%40thread.tacv2/Teams%2520Approvals?groupId=ed2ec719-9154-4940-aa21-8b0d5e1ed058&tenantId=ee57f555-1d70-4a8b-8eda-c0f4071a4458) |
|  | *If an in-person or hybrid event*, **submit 25Live request** to reserve space\*\* | [25Live login](https://25live.collegenet.com/pro/coastline#!/home/dash)  To include the event in the student calendar (even if in-person event), please follow all steps on this document: [Adding Events into 25Live](https://documents.coastline.edu/Faculty-Staff/25Live-AddOnlineEvent-ADA_2023-11-20.pdf) |
|  | *If an online event that you want to appear on the student calendar*, **add event on 25Live**\*\* |  |
|  | *If members of the public may attend or your event is outside of college operating hours (generally Monday-Friday from 8am-5pm)*, **submit Facilities Use Agreement** (FUA)\*\* | [FUA form](https://navigator.cccd.edu/district/fas/rs/Risk%20Services%20Documents/Application%20for%20Use%20of%20Facilities%20and%20Rules%20and%20Regulations%20-%202021.5.1.pdf) |
|  | *If you plan to fundraise,* **complete the** [**Club Fundraising Activity Request**](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2f1fbbe9a2-dbd0-4464-99f9-bc6e3a1ca45f). To complete this, you will need:   * A clearly defined purpose for the fundraising * Club minutes approving the fundraising activity * A fundraising budget (can use [budget template](https://documents.coastline.edu/Student%20Life/Clubs/Fundraising%20Budget%20Template.xlsx))   All deposits must be accompanied by receipts or, if applicable, a letter from a donor as required by the [Coastline Foundation](mailto:foundation@coastline.edu). | Business Services can provide cashboxes and Student Life can provide receipt books, as needed. |
|  | *If designing promotional graphics yourself*, ensure materials are accessible **by emailing them to** [**Dean Aeron Zentner**](mailto:azentner@coastline.edu) for approval (please CC [Student Life](mailto:studentlife@coastline.edu)) | [Coastline College Accessibility Guide](https://documents.coastline.edu/Faculty-Staff/Accessibility/Accessibility%20Guide%20Infographic%20A001.pdf) |
|  | *If requesting promotional support from Marketing (graphic design, social media, website, email campaigns, and Sandbox newsletter),* [**email Marketing**](mailto:marketing@coastline.edu) to make a request | Requests should be made 4+ weeks before planned distribution date and should include finalized copy (text)  See [Template Email to Marketing](https://documents.coastline.edu/Student%20Life/Clubs/Template%20Email%20to%20Marketing.docx) |
|  | If needed, **request purchasing** through Student Life:   * Check to pay vendor/contractor-   + Request quote from vendor   + Submit [Club Check Request for Vendor Form](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2fc96f962d-29fb-4515-93e8-933fda3db904) * Reimbursement-   + Get Student Life email approval prior to purchase   + Complete the [Reimbursement Request](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https://dynamicforms.ngwebsolutions.com/Submit/Start/C006CE36-7FAD-4994-AB8A-4B16A0E8520C) to submit receipt(s) after purchase | If a contract is needed, this must be approved first for contractor to be eligible for payment. This may take 4-8 weeks to process.  After Student Life approval, check requests may take up to 2 business weeks to process  Gift cards and alcohol are not allowed to be purchased with ASG funds. |
|  | *If it is an* ***off-campus trip***:   * If costs will be incurred by the advisor, they must complete a [Conference Authorization Request (CAR) form](https://navigator.cccd.edu/employee-resources/Documents/CCCD%20-%20Fillable%20Conference%20Authorization%20Request%20(CAR)%20-%202023.pdf) to be signed by both their department chair and/or supervisor and Student Life\*\* * *If planning to use district transportation*, [request a bus or vans](http://www2.cccd.edu/facultystaff/transportation/forms/fieldtriprequest.html) and then call the Transportation Dept at 714-438-4691 five days prior to confirm transportation arrangements\*\* * At least 1 business day prior to trip, email [Student Life](mailto:studentlife@coastline.edu) a roster of participating students (including student ID numbers and contact information) * All participants should complete the [Volunteer Activities Participation (VAP) form](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2f2c27179f-c765-4201-80e7-79e6e133a0fb) | [Travel/Conference Procedures for college employees](https://navigator.cccd.edu/employee-resources/Pages/%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8BTravel-and-Conference-Procedures.aspx#generalinfo)  Transportation requests should be done 4 weeks prior to the date of the trip.  Buses seat 52 and vans seat 8. The number of buses/vans will be based on the number of passengers in the request (you do not need to submit multiple requests for the same trip).  If using district vans, drivers must be trained by the District [Transportation Dept](mailto:jvasquez@cccd.edu) (one-time training) and must return with a full tank of gas. |
|  | *If you need IT & AV equipment/support (mic, speakers, projector, etc.)*, **place** [**IT request**](https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Fservicedesk.cccd.edu%2F&data=05%7C01%7Cacarlock%40coastline.edu%7Cd3bd9d89b5f84c90d79808daa55fada4%7Cee57f5551d704a8b8edac0f4071a4458%7C0%7C0%7C638004127756535816%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=m3dNUhNlYMWySsyePnJa2FoLtf2Gq2su7%2FtMt47NqeI%3D&reserved=0)\*\* | For most requests, select “Information Services”, then “Audio Visual and Video Conferencing Services”, then “Set Up audio visual equipment for an event” |
|  | *If requesting printed materials:*   * For flyers and small posters (11”x 17” or less),[**submit a Print Shop Request**](https://helpdesk.coastline.edu/marketingrequest/index.php?a=add)through Coastline * For brochures and larger posters, **email** [**Student Life**](mailto:studentlife@coastline.edu) **details of your request** so we can submit an order on your behalf to OCC’s Print Services | Requests should be made 2-3 days before materials needed; longer if through OCC  Pricing list from [Coastline](https://cccd0.sharepoint.com/:b:/s/ClubAdvisors/EYWTcRvNNY1EvVp7vpAR_f0BmldE2Hq6qTG1Sn7B1Npayw?e=W96ksl) & [OCC](https://occportal.orangecoastcollege.net/Departments/Administrative%20Services/Reprographics/Document%20Library/PrintServicesPricing.pdf)  List club name as department. Delivery address can be “Student Life” if you want to pick them up at our office (Student Services Center 204) |
|  | *If posting materials on campus,*   * For Garden Grove Campus, give to [Leonora Castillo](mailto:lcastillo31@coastline.edu) at the front desk to be posted to the bulletin boards and send a digital copy to [Michelle Edison](mailto:medison@coastline.edu) to be included on digital signage in the lobby * For Newport Beach Campus, give to [Kathy Bledsoe](mailto:kbledsoe@coastline.edu) to be posted in the glass bulletin boards or in the office. * For Student Services Center (Fountain Valley), flyers can be posted on the bulletin board near the 1st floor restroom. * For Westminster Le-Jao Campus, contact [Minerva Guray](mailto:miguray@coastline.edu) for help with posting. |  |
|  | *If requesting communications from Student Life (texts to students, Student Services newsletter, mobile app push notification, and NSLS listserv)*, [**email Student Life**](mailto:studentlife@coastline.edu). | Requests should be made 5+ business days before planned distribution date  See [Template Email to Student Life for Communications Support](https://documents.coastline.edu/Student%20Life/Clubs/Template%20Email%20to%20Student%20Life%20for%20Communications%20Support.docx) |
|  | *If you need resources (tables, chairs, podium, etc.),* **place** [**M&O request**](https://servicedesk.cccd.edu/footprints/servicedesk/login.html) (even if included in 25Live)\*\* | Requests should be made at least 48 hours prior to the event  Check [25Live](https://25live.collegenet.com/pro/coastline#!/home/dash) for available resources and specify quantities needed on request |
|  | **Post promotion on the Coastline mobile app** (*optional*) | [Coastline app](https://www.coastline.edu/student-life/coastline-app.php)- post on the [Community feed](https://documents.coastline.edu/Student%20Life/Coastline%20App%20Tour.pdf) (page 5) |
|  | **Finalize event schedule and facilitation**, including setup and breakdown |  |
|  | Enjoy your event and **take pictures** to share with Student Life so we can help get the word out about the amazing things you are doing! | Post a photography disclaimer poster ([option 1](https://documents.coastline.edu/Student%20Life/Clubs/Photography%20Disclaimer%20Poster%20(Blue).pdf), [option 2](https://documents.coastline.edu/Student%20Life/Clubs/Photography%20Disclaimer%20Poster%20(White).pdf)) visibly in the event location (and take a picture of it) or all participants in photos should sign the [Image Release Form](https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://sts.windows.net/ee57f555-1d70-4a8b-8eda-c0f4071a4458/&SpSessionAuthnAdapterId=cccdDF2&TargetResource=https://dynamicforms.ngwebsolutions.com/Submit/Start/fc78c491-8de4-4d45-8160-f50202c45a3b) (required regardless of poster presence for participants under 18 years old) |

\*NTE= Not to Exceed (i.e. the upper limit of the range approved by the club)

\*\*Need to be completed by club advisor as college employee