HAA Volunteer Event Planning Guide

Step	Item	Details	Timeline
1	**Briefing call/meeting**	• Brainstorm event ideas and decide upon a final proposal. Set smart event goals- and agree on objective of event, including attendees' goals for attending. • Agree on metrics for evaluating success of the event. Evaluate cost of event and potential funding options.	**3 months prior to event**
2	**Committees**	• Establish a large, diverse committee and smaller subcommittees. Choose an event chairperson(s).	
3	**Timeline**	• Establish a planning timeline (including proposed event date).	
4	**Budget**	• Establish a budget and a structure for budgeting. • Consider hidden costs and add 10-20% for contingencies. • Think about partnering with another organization for cost sharing, marketing and increasing diversity of participation (age, race, geography, school). • Consider casual, self-funded events. Inquire if participating alumni leaders may be interested in sponsoring or subsidizing the event.	
5	**Speakers**	• Brainstorm a ranked list of potential speakers and send invitations. Establish RSVP deadlines for speaker responses.	
6	**Venue**	• Research and select venue. • Consider catering, AV, room-set-up, access to transportation, and parking when selecting venue. • Determine if venue has live stream capabilities and cost. • Consider venue contract food and beverage guarantee deadline in order to inform RSVP deadline. • Investigate different types of venues and days/times to make the event more accessible. • Provide non-profit paperwork if needed. • Consider offering childcare and/or subsidies to recent graduates.	
7	**Website**	• Post event to Club/SIG or applicable website.	**7-10 weeks prior to event**
8	**Save the Date**	• Send a "Save the Date" to target audience. Coordinate schedules/calendars.	
9	**Speaker materials**	• Once speaker has been selected, request marketing materials (including speaker biography, lecture title, link to online relevant materials such as papers/articles and photograph) and AV needs.	
10	**Speaker logistics**	• Plan for speaker logistics (for example, transportation to and from event, special dietary needs, lodging). As event details are confirmed, provide periodic updates to speaker. Identify event mentors.	

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11	**Registration**	• Create event registration plan and, if necessary, create online registration page via Alumni Magnet or another system.	
12	**Invitations**	• Send formal email or mail invitations. Consider personalized event outreach – for example, phone calls and emails to classmates. Identify the audience's motivation to attend.	**8 weeks prior to event**
13	**Marketing communications**	• Market event on Club/SIG/Class website, Facebook, Twitter, Instagram, Snapchat, newsletters, email blasts, etc.	**Begin 8 weeks prior, continue through event**
14	**Track**	• Track registrations, update venue as necessary.	
15	**Event materials**	• Create/Collect any event materials (for example, nametags, Club/SIG marketing handouts, speaker handouts, seating chart, etc.).	**Begin 2-3 weeks prior, continue through event date**
16	**Event briefing**	• Create event briefing with directions to venue, event timeline, contact information for Club/SIG Leader, and any other necessary details. • Assign event volunteers and/or board members to roles (such as host, welcome/introductions speaker, registration manager, etc.) • Send to event leaders and speaker. • Send final briefing to speaker and Club/SIG leadership 1 week prior to event.	
17	**Reminders**	• Send reminders to members/potential audience on as needed pulsed basis. • Consider including a list of other events from the group (club/sig/other) to keep group informed of other opportunities to help drive engagement and connections. • Reminder one month prior to event, few weeks prior to event if spots are still open.	
18	**Confirm venue**	• Confirm AV and final numbers with venue and catering. Confirm venue contract for deadline.	**2 days before event**
19	**Event reminder**	• Send event reminder to all registrants and speaker. Consider including reminders of event details such as time, venue address, dress code, etc.	
20	**Day of logistics**	• On day of event, event organizers should plan to arrive at the event approximately 60-90 minutes prior to the suggested arrival time for event guests to check on all venue details, set up registration table, and test AV equipment. • If registration is being taken at the door, be sure to have a laptop to process online registrations with credit card and/or cash on hand to manage cash registrations. • Be sure to count the number of attendees and	**Day of Event**

		gauge the overall satisfaction of event attendees. • Note you may need to pay suppliers at the events. • If you are registered as a non-profit be sure to have your number available.	
21	**Guest interactions**	• Ensure there is someone (committee member or other) focused on greeting new people to help them feel welcomed. • Have materials available to engage and enroll new potential members – or people who may want to become more involved as a member of the alumni community (alum interviewing, planning events, joining club/sig/class committee). • Assign someone to take photos at event to post on social media sites or sig/club/class websites.	
22	**Attendee email, survey**	• Send post-event thank you email and survey to attendees through Survey Monkey, Google Form, or other platform (optional).	**Day after event**
23	**Thank you notes, gifts, debrief**	• Write thank you notes to any necessary parties, including speaker. • Send gifts for speakers or donations in speaker's name. • Debrief with planning team.	**Up to 1 week after event**
24	**Event write-up**	• Post event write-up and/or photos on Club/SIG website, Facebook, Twitter, or other platforms.	
25	**Invoices**	• Pay all outstanding invoices to venue, catering, etc.	**<1 month after event**
26	**Post-event analysis**	• Reflect upon event with event planning committee • If collected, analyze survey data to think about how to improve future events. • Consider the metrics used to measure success – attendance, participation, survey responses etc.	
27	**Sustain impact**	• Consider how to harness the energy and excitement and give the event legs. • Use post-event surveys. • Use events as an opportunity to identify volunteers for the future.	

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Event Briefing Template

Event Title: _____

Host Organization: _____

Event Details:

- o **Event Date:** _____
    - Event Start Time: _____
    - Event End Time: _____

- o **Event Location:**
    - Venue Name: _____
    - Venue Street Address: _____
    - Venue Website: _____

- o **Marketing/Registration:**
    - Event Website: _____
    - Registration Page or Contact: _____

- o **Guest Details:**
    - Invited Parties/Demographics of Guests (ex: young alumni, club board members, etc.):

      _____

      _____

    - Expected Number of Guests: _____

Event Flow/Format:

Time	Action	Responsible Person

Contact Information:

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Event Chair Person:

Name: _____

Title: _____

Email: _____

Preferred Phone: _____

Cell Phone (for day of event): _____

Speaker:

Name: _____

Title: _____

Email: _____

Preferred Phone: _____

Cell Phone (for day of event): _____

Venue Contact:

Name: _____

Title: _____

Email: _____

Preferred Phone: _____

Cell Phone (for day of event): _____

Notes (this section can include any miscellaneous information, some suggestions are included below):

o Price of event
o Parking information
o Dress code
o Menu (including any special dietary requests)
o Room set-up/diagram and/or seating chart
o AV needs of speaker/club
o Talking points for welcoming speaker

Questions about event planning with the HAA or this document?
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