

EVENT PLANNING WORKSHEET FOR REGIONAL OFFICERS

Though by no means comprehensive, this document can provide a starting point from which regional officers can conceive, plan, promote and run well-organized programs for their associations. For additional information and assistance, please contact the Regional Affairs staff at the Office of the Alumni Association at acra@princeton.edu.

STEP ONE – EVENT CONCEPTION

When developing an event, it is helpful to answer essential planning questions – **Who? What? When? Where? Why? How? How Much? and How Many?**

- **What** is the purpose for this event? **Why** will people want to attend? _____
- **Who** is the target audience? **Who** will be invited? **How many** people are expected to attend?

- **When** and **where** will the event be held? _____
- **How much** will this event cost to run? **How much** will it cost for people to attend?

- **How** will this event come together, and **who** is responsible for making sure this happens?

STEP TWO – EVENT DETAILS

Taking care of the minutiae of logistics is critical to ensuring a smoothly-run event.

- **Venue:** _____ Choose a venue that is conveniently located, accessible, and conforms to University policy regarding non-discrimination
_____ Reserve space (review contracts – submit to University Offices of General Counsel and Risk Management for help with legal terms and insurance requirements)
_____ Set payment schedule and submit deposits on time
_____ Inquire about other events happening at the same time: will they be noisy?
_____ Discuss physical set-up (tables, podium, signage, coat check, decorations, etc.)
_____ Set event timeline: when does set-up begin? when must people leave by?
- **Food:** _____ Hire caterer; or decide who is responsible for bringing food and other supplies
_____ Decide on menu, including beverages: will alcohol be served? Cash or hosted bar?
_____ Will minors be present (if so, inform venue)?
- **Decor:** _____ Order flowers, linens, balloons, Princeton-themed paraphernalia, etc.
- **Speaker:** _____ Confirm speaker’s name, title, title of presentation, length of presentation, A/V needs, expected duration of Q&A; Obtain bio for promotional materials and/or introduction
_____ If using University Speakers Bureau, coordinate with Alumni Association Office on hotel options, transportation, alumni contacts, and other logistical details
- **A/V:** _____ Determine required audio/visual needs (microphones, projectors, computers, cables, Internet access, phone lines, screens, DVD players, etc.)
_____ Will a technician be in the room or in the building to assist with issues?
_____ To save costs, determine if association members can supply some/all A/V equipment
- **Registration:** _____ Determine RSVP methods – online, email, phone, etc.
_____ Track RSVPs and payment of event fees
_____ Produce list of attendees to bring to the event
- **Assigned Tasks:** _____ Volunteers to work registration desk
_____ Volunteers to sing “Old Nassau”
_____ Volunteers to arrive early for set up and stay late for break down
_____ Volunteer to emcee: provide with all necessary materials (bios, timeline, etc.)
- **Supplies:** _____ Nametags – pre-print or bring blanks
_____ Table tents for panelists, reserved signs for tables/chairs
_____ Event-specific signage (ask in advance what the venue will supply)
_____ Assorted useful last-minute office supplies (see Step Four for complete list)

EVENT PLANNING WORKSHEET FOR REGIONAL OFFICERS

STEP THREE – EVENT PROMOTION

If you tell them about it, they will come!

- **Save the Date:** _____ Announce big events at least 3 months in advance
- **Invitation:** _____ If using Alumni Printing and Mailing Services through the University, begin invitation design process 7 to 10 weeks in advance of the event
_____ If printing and sending invitation locally, download updated constituent list from TigerNet Volunteer Services
_____ Send printed invitation: 4 to 6 weeks in advance
_____ First email announcement: 4 to 6 weeks in advance
_____ Reminder notice as RSVP deadline approaches
_____ Last minute reminder/confirmation notice: 1 to 3 days in advance
- **Website:** _____ Post notice on regional website
_____ Send event information to Regional Affairs staff for inclusion in master online regional events calendar and “Take Note” PAW insert (if deadlines allow)
- **Telephone:** _____ Call targeted list of likely attendees and/or wider phone chain
- **Tell Others:** _____ Notify related Princeton constituencies (i.e. class, APGA, or affiliated group officers)
_____ Notify nearby Princeton regional associations about big events
_____ If appropriate, notify local IvyPlus alumni clubs that may be interested

STEP FOUR – RUNNING THE EVENT

Things to bring and things to do on the day of the function:

- _____ **Pre-made materials** – pre-printed nametags, table tents, signage, pre-registration lists, sign-in sheets, dues-payers list, table numbers, place cards, introductions (bios), etc.
- _____ **Princeton materials** – regional association banner, Princeton-logo napkins and/or cups, flyers for upcoming local events, printed lyrics for “Old Nassau”
- _____ **Other useful supplies** – blank nametags (all or extra), pens, markers, pencils, scissors, scotch tape, masking tape, blank paper (cardboard, lined, printer), business cards
- _____ **Camera** – take photos with the permission of the speakers and sites
- _____ **Arrive early!**
- _____ **Set up** – registration table, signage, decorations, etc.
- _____ **A/V check** – is necessary equipment present and working properly?
- _____ **Review event timeline** – with venue staff, catering staff, and/or volunteers
- _____ **Manage the event** – be alert to potential problems and available to assist with issues
- _____ **Clean up** – deconstruct the event; ensure everything brought in (i.e., supplies) is taken out

STEP FIVE – POST-EVENT WRAP-UP

The event is not truly done until the following things happen:

- _____ **Record attendance** – was the participation goal met or exceeded?
- _____ **Update Web Posting** – if event was promoted on a regional website, deactivate registration link, then post a report and/or pictures of the function
- _____ **Settle Finances** – make final payments, ask for deposits to be returned, reconcile expenses with the event budget
- _____ **Send thank you notes** – to speakers and/or volunteers who made special efforts
- _____ **Evaluate Event** – how was the event successful? In what areas could more be done? Establish lessons learned for future regional events.