Chapter Event Planning Essentials

Overview - Things to remember
- The type and number of events will vary from chapter to chapter depending on the size of the chapter and the interest of the alumni. There is no magic formula for the number of events to host in a year.
- Your alumni come from diverse backgrounds and have varied interests. Host a diverse calendar of events that will appeal to various interests. Don’t make one event the catchall – one event can’t appeal to everyone!
- Take advantage of what your community has to offer and what makes your community unique. You don’t have to plan all events from scratch – piggyback on events already occurring.

Best practices – tips for success
- Survey your members to find out what types of events appeal to them.
- Select the date well in advance and start promoting the event early and often.
- Offer unique events – something they can’t do on their own.
- Keep the event cost reasonable. A relatively high price will prevent alumni, especially young alumni, from attending.
- Silent auctions generally work better than live auctions. If you do decide to have a live auction, limit the number of items to 3 or 4.
- Keep your program as brief as possible. An hour-long program with your guest speaker or other activities plus an hour for dinner is generally long enough. Don’t try to accomplish everything in one event! Your attendees will become restless with a long, drawn out event.
  - If you can’t say it in an hour, put it in the program. This is a good place to include annual chapter re-caps.
- You can never have enough help! Make sure to have a committee of volunteers to help with the planning and promotion. And make sure to have enough volunteers on hand at the event.
- Designate chapter volunteers to serve as greeters at the event – this makes everyone attending feel welcomed.
- Have music at the event, it livens things up. This can be as simple as background music during the registration time.
3 keys to event programming

Questions to ask yourself when choosing an event

- Selecting an event
  - Consider the following when deciding to host an event:
    - Event Objective
      - What is the objective of the event? Is it social, networking, family friendly, volunteering in the community or a combination?
    - Target Audience
      - Who is your target audience? Who do you want to attend this event? Who has attended similar past events?
      - Will this event attract new participants
    - Past events
      - What events were successful in the past? What do you think made them successful?
- Selecting a date
  - Consider the following when choosing your date:
    - Conflicts with other events in your area or holidays
    - Location availability
      - Are you flexible on the location or is it important to the success of the event?
    - Time of the event
      - In a big city, does the start time leave enough time for alums to arrive after work?
    - Lead time
      - Is there enough time to successfully promote your event?
- Selecting a location
  - Consider the following when choosing your location
    - Centrally located venues are ideal
      - Survey your alumni to find out which area of town works best for them
      - Will the venue be hard to get to at that time of day?
    - Unique locations will draw people to your event
      - Alumni will attend an event if it’s at a venue that they don’t usually have access to.
    - All costs involved
      - Rental fees, catering, equipment rentals, parking fees, etc
      - Does hosting the event there justify the cost you will need to charge to cover the expenses?
    - Set up of the facility
      - Is the room large enough to accommodate your expected number of attendees?
      - Is the room too large? Events that are held in venues that are too large tend to seem emptier than they are.
      - If it’s outside, is there an alternative rain plan?
    - Parking
      - Is it easy and accessible?
Communicating the Event

Promoting the event – how to get them there

- Promotion is essential to the success of an event – if they don’t know, they won’t come!
- Ways of promoting your event
  - Website
    - Update your website with any new, upcoming events. Make sure to include all pertinent information – date, location, time, cost, if applicable.
    - Don’t just include the basics – make the event sound fun!
    - Update your website with write ups and photos from past events – this showcases your successes and speaks to those alums who have not attended events in the past.
  - Emails
    - The Texas Exes will email event notices for chapters on a weekly basis.
    - If you are trying to promote a large event, send that event out in a stand alone email, rather than part of an email newsletter.
    - Emails can be segmented by demographic information. We can send emails out based on graduation year, for example. This allows you to customize your message.
    - It’s always a good idea to send a reminder email a day or two days before the event.
  - Paper mailings
    - Invitations for events should be in mailboxes 6 to 8 weeks prior to the event
    - Send all paper mailing requests to the Texas Exes 10 days prior to your target mail date – this will ensure they hit mailboxes in plenty of time.
    - Standard mailings are either a postcard or a tri-folded letter size self mailer. We can help design the mailing to suit the event.
  - Local papers or magazines
    - Advertise your event in the local media. Lots of local newspapers and magazines have calendar listings of local events. Generally those listings are free or carry a nominal fee.
    - If it’s a larger event, consider purchasing an ad in the local paper or magazine. This will help attract alumni that are new to the group.
To make your communications most effective make sure to include the following:

- Name of event
- Description of event
- Time of event
- Location of event
- RSVP deadline
- Cost per person
- Event details – dinner, cash bar, etc
- Parking information
- Information on attire
- Contact information for questions
- Information on speaker, if applicable
Chapter Guidelines and Resources

**Guidelines**
- Only use insured, licensed and bonded bartenders to serve alcohol during chapter events.
- For tax deductibility reasons, the fair market value of the ticket must be stated on the invitation.
  - The fair market value is what the individual would normally pay for the food, goods, and/or services.
  - Example: if a restaurant would charge $25 normally for the meal being served, then $25 is the fair market value.
  - This amount does not necessarily have a direct relationship to the amount the chapter is paying for the food, goods and/or services being provided.
- **Raffles**
  - In state chapters are limited to two raffles per year. Out of state chapters must follow their state’s guidelines.
  - The raffle prize cannot be cash.

**How we can help**
- Provide two free mailings per year – 1 to members only and 1 to both members and non-members
- Provide weekly email updates to both members and non-members
- Chapters are covered under the Texas Exes liability insurance. If you need proof of insurance, please request it through Texas Exes.
- Provide nametags, balloons, cups, and napkins
  - Logo cups ($5 for a sleeve of 25)
  - Logo napkins ($10 for a sleeve of 250)
- **Banners**
  - Groups can order banners through the Texas Exes.
  - Send requests to Texas Exes.
  - The chapter/network is responsible for the cost.
    - A standard 2 x 6 banner runs approximately $60.
- Serve as a sounding board for chapter ideas and a resource to help insure the success of the event.
Event Planning Checklist and Budget

Checklist

Location
__ Parking is available and convenient
__ Location is central
__ Venue is suitable for event

Facilities
__ Name and contact of representative responsible for your event
__ Know location of lighting, heating/air conditioning, music controls
__ Size of room is adequate
__ Registration/Welcome Tables
__ Room set up time – how early will you have access to the room vs anticipated set up time
__ A/V equipment, if needed, is available

Materials
__ Sign in sheet
__ Nametags and pens
__ Any chapter handouts

Bar Arrangements
__ Cash bar or drinks included
__ Confirm other drinks will be available
__ Open and close time of bar

Food Arrangements
__ Determine menu and food set up – sit down dinner vs buffet vs hors d’oeuvres
__ If short on time, ask that first course is preset
__ Confirm deadline for submitting guarantee
__ Confirm billing arrangements
__ Plan for gratuities

Speakers
__ Where and by whom will speaker be met
__ Decide if a small gift for the speaker is appropriate
__ Prepare program of event for speaker

Hospitality
__ Assign someone to work the registration table as a greeter
__ Have Board members work the room as greeters
**Budget**

Expected Attendance: ________

Admission Price: $ ________ Texas Exes Members  $ ________ Non members

Projected Expenses:
- Facilities/room rental charges $ _____
- Set up charges/fees $ _____
- Rental equipment (a/v, tents, tables, chairs, risers, etc) $ _____
- Food $ _____
- Beverages $ _____
- Bartender and server fees/gratuities $ _____
- Decorations $ _____
- Entertainment $ _____
- Miscellaneous (photos, speaker travel expenses, supplies, etc) $ _____
Event Planning Timeline

4 to 6 months in advance  Date ______________________
___ Confirm event date with Chapter Board
___ Reserve venue for event
___ Set the budget
___ Start collecting donations for auction items, if applicable

2 to 3 months in advance  Date ______________________
___ Finalize the details: menus, bar arrangements, speaker (if applicable), cost, etc
___ Assign specific jobs to Board and/or committee members
___ Decide how to take reservations and deadline for reservations
___ Rent any equipment needed

9 weeks in advance  Date ______________________
___ Send details for paper mailing to Texas Exes, if applicable

6 to 8 weeks in advance  Date ______________________
___ Paper mailings should be in the mail, if applicable
___ Order any supplies or decorations needed
___ Post event on chapter website
___ Send out save the date email
___ Invite any special guests

3 weeks in advance  Date ______________________
___ Send out email to announce event
___ Begin work on paper program

2 weeks in advance  Date ______________________
___ Confirm with speakers
___ Finalize program and get to printer

Week of event  Date ______________________
___ Final headcount to caterer
___ Print out rosters for event, if applicable
___ Put together materials for the event – sign sheet, membership brochures, nametags, pens, etc
___ Finalize all auction items
Post Event Report

Event Evaluation

Event Name: ________________________________

Date: ______________   Number Attended: ______________

Location
Venue Name: ________________________________

Address: ____________________________________

Contact Name: __________________________________

Contact Phone #: ________________________  Contact Email Address: __________________________

Would you recommend this location in the future: ______________________

Food & Beverage
Menu: ________________________________

Cash bar or open bar: ______________________

Event Evaluation
Venue:   _______ Excellent _______ Good _______ Okay _______ Poor

Food/Beverage: _______ Excellent _______ Good _______ Okay _______ Poor

Program/Agenda: _______ Excellent _______ Good _______ Okay _______ Poor

Overall Event: _______ Excellent _______ Good _______ Okay _______ Poor

Suggestions for next year:

__________________________________________

Submitted by: ________________________________
Post Event Checklist

Provide the following to pass on to future event coordinators:

__ Copy of invitation and all other marketing materials
__ Copy of program
__ Speaker/Entertainment with contact information
__ Copy of menu
__ Copy of committee list
__ Photographer with contact information
__ List of decorations used
__ List of auction items
__ Notes on what worked/what didn’t work