



TRINITY UNIVERSITY

Event Planning

Events are the core of Chapter and Network Cities and range in type from social, intellectual, and educational, to athletic, cultural, and community service. Each chapter/network differs in how many and what types of events are planned. Some chapter/networks find that one or two events a year work well with their constituency, while other chapter/networks organize several activities each month.

If you are just launching your chapter/network, the first event should have broad-appeal, be low-cost and easy to organize. Many chapter/networks find that planning a simple happy hour or reception is an excellent kick-off event for the year. You and your board can decide what will work best for your region. Your chapter/networks staff member can also provide advice on what chapter/networks with similar demographics do and what events have succeeded in the past.

Successful events are critical for any chapter/network. This section will assist you in developing a program that will appeal to a broad range of alumni. Additionally, it will help you manage the details that make an event successful.

1. Tips for Holding Great Events
2. Speaker Guidelines
3. Event Planning Checklist

1. TIPS FOR HOLDING GREAT EVENTS

VENUE

Creativity is key when selecting a venue for your event. Consider using a location that isn't typically accessible to the general public – people generally enjoy places that are new and unique.

Look for facilities that already have an entertainment focus (i.e., wineries, museums, aquariums, historic sites, performing arts facilities, or culinary academies). Check to see if any of your officers or local alumni have access to these facilities or sit on the boards of local museums or organizations. You might be surprised at the wealth of resources in your own backyard! Use your status as a non-profit, educational service group to open doors.

When researching venues you should consider the following:

1. Capacity – Does it fit your target audience size?
2. Availability – Is it available on the date that you have chosen for your event? If not, is your date flexible?
3. Price – Is the rental fee in your budget, and are there additional fees beyond the rental (i.e. security, cleaning)?
4. Ambience and format – Is it the right space for your event and/or speaker? (i.e. bar, restaurant, conference room, auditorium, etc.)
5. Accessibility – Does the space need to be child-friendly? Is it wheelchair accessible?

CATERERS

When contracting with caterers (MUST be approved by Trinity University Risk Management) for food and beverage you should consider the following:

1. Meal – What type of food best fits your event: breakfast, lunch, dinner, heavy hors d’oeuvres, or light appetizers?
2. Budget – How much can you afford to spend per person? Remember that up to 30% of the total bill may be comprised of tax, service, and gratuities.
3. Read the contract – Make sure you know what you are guaranteeing. The caterer may ask you to meet a minimum expenditure, so be sure that you know your attendance numbers and adjust them by the contracted date.

Tips:

- *Do not serve alcohol without serving food, and be sure to include nonalcoholic choices.*
- *Allow for about 6 to 8 hors d’oeuvres per person per hour.*
- *A bottle of wine serves about 5 glasses.*

AUDIO VISUAL

When assessing audio visual needs you should consider the following:

1. What AV equipment is called for by the event? Is there a speaker presentation? Is the room large enough to necessitate using a microphone? Do you want to play music?
2. Always ask your speaker(s) what AV needs they have (i.e. podium, slide projector, PowerPoint, wireless microphone, etc.)
3. Budget – Don’t assume anything is available for free
4. Always conduct a sound check the day of the event
5. Always be sure to have a glass of water at the podium or table for any speakers

BOOSTING ATTENDANCE

If your attendance numbers are low, phone calling is an effective way to encourage people to attend. Set up a phone tree with members of your board. Often alumni just need a little encouragement or a reminder to attend an upcoming program and the personal touch of a phone call can make the difference.

THE PERSONAL TOUCH

One of the greatest concerns that many alumni have before attending an alumni event is whether or not they will know anyone when they get there. If chapter/network volunteers go out of their way to make people feel welcome, then they will greatly increase the chances of alumni attending future events. As simple as it sounds, some chapter/networks forget to welcome guests as they arrive, introduce attendees to one another, or engage wallflowers. We also strongly encourage the use of nametags at all events.

ALCOHOL

In most cases a cash bar is preferable to an open bar in order to keep the price affordable and to attract more attendees. Your caterer can recommend the appropriate amount of beverages to order for your group.

AFTER THE EVENT

Keep records about your event. Following your event, be sure to email your chapter/networks staff member with an event attendance list, receipts, and group photos. At the board meeting following an event, discuss what worked, what did not, and what you might do differently the next time. Share this feedback with your Alumni Relations staff member.

2. SPEAKER GUIDELINES

In order to manage the multiple speaker requests for faculty and administrators, we encourage all chapter/network leadership to adhere to the guidelines below:

ALUMNI RELATIONS REQUESTS THE FOLLOWING:

- Speaker request should be submitted to Alumni Relations three months in advance of your event by emailing your Regional Chapter/networks staff member the following information:
 1. Preferred speaker(s) and/or topic(s)
 2. Preferred dates or date range
 3. Event format (i.e. dinner, cocktail reception, seminar)
 4. Event venue (i.e. home, office, restaurant)

- Expected minimum attendance at the event
- Communicate with your Regional Chapter/networks staff member about attendance numbers two weeks prior to the event and identify if additional marketing and promotion is necessary.
- If your chapter/network is communicating directly with the speaker, copy your Regional Chapter/networks staff member on all communications between the chapter/network and the speaker

WHAT ALUMNI RELATIONS WILL PROVIDE:

- A faculty member or administrator to speak to your chapter/network/group once each year
- Broadcast e-mails to all alumni in your region
- Briefing document for speakers outlining event format and attendance lists

3. EVENT PLANNING CHECKLIST

THREE TO SIX MONTHS IN ADVANCE:

- Develop a project plan: audience, attendance goal, calendar, timeline, etc.
- Select a day of the week and time of day that best suits the event – keep in mind potential conflicts, such as holidays and local events/school breaks
- Research venue options and visit prospective sites
- Research catering and get bids: Check if venue has a preferred catering list or in-house caterer
- Research AV needs: Check if venue has a preferred vendor list or in-house AV
- Research area logistics, i.e. parking fees and local transportation
- Select a venue and secure contract – **MUST BE APPROVED BY TRINITY RISK MANAGEMENT**
- Select a caterer
- Plan out event budget to determine admission cost. Discuss with Alumni Office.
- Research potential speakers and contact your Regional Chapter/networks liaison regarding speaker availability

ONE TO TWO MONTHS IN ADVANCE:

- **6 weeks before your event:** send in a draft of invitation to the Alumni Relations Office with details on Who, What, Where, and When. Email invites can be sent 4-6 weeks in advance. Earlier if needed.
- **4 weeks before:** Alumni Office will need to email your invitations out to your target guests.

- to promote attendance, consider involving board members to make some calls or sending personal emails encouraging all to attend the events
- Make sure you have blank name tags from Chapter President. If you don't, ask your Alumni Relations staff person.
- Begin to recruit volunteers to help at the event

TWO TO FOUR WEEKS IN ADVANCE:

- Finalize catering menus
- Order and confirm all AV equipment and finalize room set-up with facility –podium with mic, projector, laptop, connecting cable, screen to present on
- Create a speaker intro if needed
- Send out reminder emails to boost attendance (Alumni Office)
- If attendance is low, make phone calls to personally invite alumni
- Check registrations and adjust estimate with caterer, if needed

ONE TO TWO WEEKS IN ADVANCE:

- Finalize event timeline and agenda
- Give caterer final numbers
- Issue final payments to all vendors or be prepared to pay them on-site
- Walk through the event with contracted vendors

DAY OF EVENT:

- Arrive early
- Set up registration area and nametags, place signage. Bring pen and sharpie for name tags.
- Learn location of restrooms and handicapped entrance
- Check in with event speaker
- Take photos throughout the event and send to your Regional Chapter/networks staff member to use for future publications or to post on your chapter/network's Facebook

POST-EVENT:

- Send all itemized receipts via mail to the Alumni Relations staff member
- Be sure to send your final attendance list to the Alumni Relations staff member
- Give feedback to the Alumni Relations staff member
- We encourage chapter/networks to send a thank-you note or email after the event to the guest speaker.