**EVENT PLANNING GUIDE**

Want to plan an Emory alumni event? We’ve gathered some best practices below to guide you through the process. See the planning checklist for the cliffs notes version, and – of course – contact your association liaison any time!

**GETTING STARTED**

Include your fellow alumni leaders and your association liaison in the event planning discussion. We can brainstorm together, check dates, agree on a budget, etc.

**Plan Early:** Work with your association liaison to determine the best date for your event and appropriate deadlines. Allow yourself plenty of time to negotiate details with venues, speakers, or any other partners, as well as sufficient time for internal processes and effective marketing. As a rule of thumb, all events should be finalized no less than 4-6 weeks in advance. Be sure to consider any external deadlines such as distributing tickets or providing final counts to caterers.

Planning Timelines:

- **Happy hours:** begin planning 8-12 weeks in advance. Connecting with restaurant managers can often be a challenge!
- **Ticketed events:** begin planning sporting events, cultural events, tours, classes, etc. as soon as the schedule is announced or the best pricing and availability. Allow more time for larger groups.
- **Holiday parties:** begin planning holiday parties and other signature events 3-6 months in advance to ensure availability. Venues book quickly during popular times of year! A host committee can be a valuable promotional tool for signature events, but does require additional lead time.
- **Speaker and panel events:** begin planning 4-6 months in advance to coordinate speaker and venue availability and allow for the development of the run of show.
- **Emory Cares service projects:** begin planning 4-5 months in advance. This global initiative requires additional internal logistics as well as a coordinated marketing effort, so finalized plans are requested 8-10 weeks in advance. Non-profit organizations that can accommodate large groups often fill up quickly, so early outreach is essential.

When selecting dates, consider potential conflicts:

- Other Emory events
- National or religious holidays
- Local festivals, school breaks, etc.
- Planning deadlines based on marketing calendar (additional details below)
**Budget:** Work with fellow alumni leaders and your association liaison to determine the appropriate budget for your event. Determine all expenses related to the event in advance, and include appropriate tax, gratuity, and service charges. Emory’s tax-exempt status does not apply to food and beverage purchases.

Consider whether registration fees are necessary. In addition to helping to cover expenses, a nominal registration fee can help to reduce drop-off in attendance. You may also wish to consider tiered pricing for recent alumni, or earlybird pricing to encourage advance registration. If walk-in registration will be permitted for events with fees, come prepared with cash to make change. After the event, please keep the cash for yourself and write a check payable to “Emory Alumni Association” in the amount of the cash received. Send this check and any other checks collected to your association liaison within one week of the event. We are unable to process credit card payments for walk-in registration fees.

Be aware of minimum guarantee requirements and nonrefundable deposits. Contracts should only be signed by your association liaison.

All event expenses will be paid by your association liaison. In the event that you must pay for an approved event expense out of pocket, provide your itemized receipt to your association liaison for reimbursement.

**Venue:** Always try to find a free venue. Survey fellow alumni leaders to determine if professional offices or private homes are available for events. Alumni may also have connections to museums, clubs, or restaurants that will waive or reduce event fees. Diversify locations and neighborhoods to broaden the total audience served.

For happy hours or socials, a private room is not necessary and often is not financially feasible. Instead, reserve a section of the restaurant or bar for alumni. Confirm that the reserved space is conducive to mingling, with room to stand and move around rather than seating at one large table.

Ask the venue in advance to provide a registration table. If the weather calls for it, inquire about coat check— it’s not essential, but it’s a nice touch.

Consider neighborhood, parking, and public transportation when selecting a venue. The best venues are centrally located, have ample free or inexpensive parking nearby, and are easily accessible by public transportation.

University policy prohibits the use of any facility that discriminates on the basis of age, color, handicap, national origin, race, sexual orientation, or veteran status. Be sure to check for ADA access, especially in older venues.

**Audio/Visual Services:** If needed, determine the venue’s available services (podium, microphone, projector, wireless access, etc.) and inquire about fees for their use.
**Food and Beverage Service:** For events at museums, clubs, offices, etc. determine if food and beverage service must be provided in-house, or if an outside caterer may be used.

Many restaurants and bars offer appetizer platters for groups. Sometimes this is the most cost-effective option, but often ordering from the regular menu allows for greater flexibility at a lower price. Ask to see both the regular menu and the group / catering menu. Confirm whether a minimum spend or minimum guaranteed guest count will apply.

If drink tickets are being provided, clarify in advance what drink tickets can be used for and how they will be billed. Possible scenarios include drink tickets billed based on a final guest count or based on actual tickets redeemed, and drink tickets billed based on drinks purchased or at a flat rate per drink. Be sure this is outlined in writing.

Remember that Coca-Cola products are required at all Emory events! If Coke products are unavailable, only non-carbonated beverages like water, lemonade, and iced tea should be served.

**Tickets:** For ticketed events, inquire about minimums required to take advantage of group discounts. Determine whether tickets can be reserved in advance, and then purchased or released closer to the event date based on actual registration, or if all tickets must be paid in full up front. Factor any deadlines into your marketing plan.

If tickets are limited, consider whether it is appropriate to limit the number of tickets each registrant may purchase.

Determine the best method of distribution for tickets, and what the venue is willing to support. Possible scenarios include: will call list provided to venue; tickets provided to alumni coordinator (you!) who places them in separate will call envelopes for each registrant and returns them to the venue; tickets provided to alumni coordinator who distributes them at a pre-event social; ticket pdfs emailed to registrants by the association; tickets assigned electronically by the association via the venue’s ticket management portal; tickets mailed to registrants by the association.

**Speakers:** When planning a panel or other speaker event, begin by identifying the overarching theme for the event and the background or expertise required by the speakers. Research potential speakers using linked.com/alumni, the Emory online directory, and referrals from your association liaison. Work with your association liaison to coordinate outreach to potential speakers, as colleagues across the university may have preexisting relationships with the alumni you’ve selected and be able to provide background information or facilitate an introduction. We cannot offer speakers an honorarium; however, consider offering complimentary tickets for speakers’ guests.

**Supplies:** Your association liaison will ship you an event package 1-2 days prior to your event with any necessary materials. Standard materials include:

- Roster
- Sign-in Sheets
- Nametags
- Sharpies
• Pens  
• Emory pennants  
• Coasters or napkins, when appropriate  
• “Did You Know?” cards with association fast facts  
• Emory Wheel, when available  
• Dooley cutouts (take a photo and post it with #whereintheworldisdooley)

If you have special requests for additional event supplies, please work with your association liaison.

**Finalize Details:** Once you have gathered all of the necessary information and are ready to move forward, share the details with your association liaison. Your liaison will sign contracts and make advance payments as necessary, and will begin our internal processes to build the registration page and schedule marketing. To do this, we’ll need to know:

- Event Title:  
- Event Date / Time:  
- Event Location:  
- Event Description: We have standard language for many events, but encourage you to be creative here. Please provide the URL for any images.  
- Registration Fee:  
- Maximum Number of Attendees:  
- Event Coordinators: This is you!  
- Any additional information that could be helpful to registrants: Parking, public transportation, etc.  
- Contact information for venue:  
- Preferred shipping address for event package (include any special instructions for mailrooms, leasing offices, etc.):

We’ll ask you to review the registration page before we begin marketing. Please take the time to look over the page for accuracy, typos, and cultural norms (i.e. referencing the “University Center” instead of “the DUC”).

**Marketing:** A minimum of 3-4 weeks is recommended for effective marketing.

One day each week is set aside for chapter / affinity group email sends. This ensures that emails do not overlap with sends from other schools and units, increases the likelihood of emails being seen, and most importantly, respects alumni’s inboxes. Your association liaison will work with the communications team to schedule the most appropriate send dates for your event. In our three largest chapters – Atlanta, New York, and DC – chapter sends are limited to the second Thursday of each month and affinity group sends are limited to the third Thursday of each month. Any information to be included in the chapter or affinity group newsletter must be finalized no later than one week prior to the scheduled send date.

Our communications team will create a Facebook event for your event and invite all group members. We encourage you to post to your own social networks as well to raise awareness of your event and drive attendance.
You may also wish to do personal outreach to spread the word about your event to fellow alumni. This not only helps to build attendance at your event, but also helps to raise awareness of the local chapter and gather information updates about alumni. Your association liaison will work with you to pull an appropriately targeted list based on class year, school, previous attendance, student activities, or any number of other criteria.

With sufficient advance notice, we can create flyers promoting your event to distribute at other upcoming events.

**Go Time**

Please arrive 15 minutes early for service projects, 30 minutes early for happy hours, socials, and ticketed events, and 60 minutes early for holiday parties and panel or speaker events. Check in with your venue contact to reconfirm arrangements, and be sure the hostess knows that you are with an Emory event and can direct guests to the appropriate location. If you’re responsible for distributing tickets, please wear an Emory hat or t-shirt so attendees can easily find you.

**Registration:** At the event, greet all guests, encourage them to sign in, and help them with name tags. Feel free to recruit additional alumni volunteers to assist in this effort. If there are registration fees associated with your event, be prepared to collect cash or check from walk-in attendees. Remember, please keep the cash for yourself and write a check payable to “Emory Alumni Association” in the amount of the cash received. Send this check and any other checks collected to your association liaison within one week of the event. We are unable to process credit card payments for walk-in registration fees.

**Welcome:** Use your best judgment as to whether a formal welcome is necessary. When appropriate, welcome speeches should be brief and provide information about the chapter, future events, and opportunities to get involved. Give a special welcome to newcomers, thank those who have helped with the event, and recognize any special guests or Emory visitors. If an association staff representative is present, plan for them to speak briefly. If you decide against a formal welcome – at happy hours and service projects, for example – be sure to introduce yourself to new faces and share information about the chapter or affinity group.

**Photos:** Take plenty of photos, or ask a fellow alumni volunteer to do so. If you post to social media, tag Emory Alumnus on Facebook and @emoryalumni on Instagram or Twitter, and use your chapter or affinity group hashtags.

**Closing out:** Please sign for the tab at the end of the evening, and be sure to get an itemized receipt.
Wrapping Up

After the event, touch base with your association liaison and fellow alumni leaders with any feedback. In some cases, a phone call may be helpful to debrief.

Documentation: Send sign-in sheets to your association liaison as soon as possible. Sign-in sheets are used to code attendance as well as volunteer interest; the data they provide are critical to informing future decisions for the chapter or affinity group.

Please also send itemized receipts to your association liaison for expense reporting.

Photos: Even if they’ve already been posted to social media, please send any photos to your association liaison for use in future marketing.

Follow-up: Coordinate with your association liaison and fellow alumni leaders to follow up with those alumni who checked boxes on the sign-in sheet indicating volunteer interest. We are always in need of new volunteers to take an active role in alumni activity!