

PennAlumni - Global Alumni Network (GAN)

Event Planning Resources Guidebook

TIMELINES

Planning Timeline

See the attached “Speaker Event Planning Timeline.” Use this sheet to schedule your event with enough time so that you can request a speaker and market your event

Event Timeline

See sample attached “Event Timeline.” This is a guideline. Your timeline does not have to mirror this one in time allotted for each introduction and speaker, but it will help you as you plan the logistics of your event.

PROMOTION

Gazette listing

Your event can be listed in the Regional Events section of the Gazette for free. However, the submission deadline is two months in advance of publication of each issue so your event must be planned well in advance. Deadlines for each Gazette issue are listed below – submissions are always due the 15th of the month, two months prior to publication.

<u>Issue</u>	<u>Event Text Due</u>	<u>Pub Date</u>	<u>Latest Arrival Date in Mailboxes</u>
Jan/Feb	Nov. 15	Jan. 1	Jan. 15
Mar/Apr	Jan. 15	Mar. 1	Mar. 15
May/June	Mar. 15	May 1	May 15
Jul/Aug	May 15	Jul. 1	Jul. 15
Sep/Oct	Jul. 15	Sep. 1	Sep. 15
Nov/Dec	Sep. 15	Nov. 1	Nov. 15

Since the Gazette is mailed on the first day of the month it is published and to allow for postal delivery, events will only be listed after the 15th of the first month of publication. For example, for the January/February issue of the Gazette, events will be listed from Jan. 15th through the end of February.

Please submit text for your event to your GAN liaison to be considered for inclusion in the Gazette.

Website updates

If you have a/an:

Club-hosted website

List your event on your website as soon as you know the date. Even if the location, pricing, time and other details are not yet finalized, it is best to give your members as much notice as possible so that they can mark the event on their calendars.

Alumni Relations-hosted website

Submit the event information to your GAN liaison as soon as possible so it can be sent to our web team for updating on your page. Please be aware that web updates for the entire GAN team are submitted once weekly. Usually they are updated quickly; however, you should allow up to two weeks for your changes to be made.

Emails – Alumni Relations Broadcast Emails and Club Listservs

Broadcast Emails

Alumni Relations can send a broadcast email to all alumni in your region announcing your event. There is also a long lead time for planning these emails, so you should work with your GAN liaison to schedule a date for your email to be sent as soon as your event is confirmed. Similar to the Gazette submissions, these emails are sent via another Alumni Relations team and we need to make their deadlines in order for the broadcast emails to be included.

The email should be scheduled as far in advance as possible.

You can have 2 different types of emails sent – plain text or html. An html email is similar to the *Red & Blue Online* emails that are sent to all alumni – it is in color and features graphics. In order to send an html email, the text and any accompanying pictures must be finalized and submitted at least four weeks in advance of the scheduled send date. In order to send a text email, the text must be finalized and submitted two weeks in advance of the scheduled send date.

Your GAN liaison can work with you to draft the text of your email, and your GAN liaison will secure the appropriate email lists from the main alumni database to use for the broadcast email.

Club Listserv emails

In addition to a broadcast email that Alumni Relations can send to all alumni in your region, you should also send emails to your club's email membership list – whether it is a list you maintain on your own or through the Penn-sponsored listserv established for your club.

It is always good to announce an event with a speaker as soon as you know the date so your alumni can save the date on their calendars and plan to attend. Many clubs make an initial announcement and then send one to two reminder emails.

Mailings

A hard copy invitation or postcard can also help to promote your event. Mailings, however, can be expensive. If you have the budget, you can send an individual printed invitation, postcard, or include an announcement in a club newsletter. You can produce these printed pieces at a local copy shop. Some clubs with large mailing lists send an electronic file of their printed piece to a print-shop that will print their piece and often address them, affix postage and then mail them. You may also produce these printed pieces at a local copy shop and then have a “label party,” where your club board or volunteers gather and put address labels on the pieces so that it does not take as long to address them.

Telephone calls

Some clubs have found that calling their membership list is an extremely effective way of encouraging people to attend an event. This can be time consuming, and not all volunteers are comfortable with making phone calls. However, this is an excellent way to connect with your club members, recruit new members, introduce yourself to local alumni and promote your events.

Other local Penn groups and Ivy groups

Depending on the nature of your event and the size of your anticipated audience, you may want to consider inviting other Penn groups to attend your event. Some suggestions include the local Wharton Club, if there is one, Penn Parents, and Penn Diversity Alliance groups.

You could also consider inviting other local Ivy alumni groups. In some regions, the local Ivy clubs routinely invite each other to their events with speakers since everyone enjoys hearing an intelligent, thoughtful presentation, regardless if it’s a gathering of their own alma mater.

Surrounding regions

If there is another Penn Club close to you (45minutes to an 1 hour), it may make sense to invite alumni from this club or region to increase attendance and participation in your club activity.

EVENT CHECKLIST

Registration Table

Have a welcome table at your event with someone from your club working at the table to greet your guests, help attendees sign-in or register and get nametags. You can also provide information on club membership or upcoming club events.

Sign-In Sheet

You will need a sign-in sheet to capture the names of guests that attended the event. It might be easiest to have a print out of the people who registered in advance. When they arrive you can

simply check their names off of your sheet. At the end of the event, you'll be able to see everyone that registered but did not attend your event. The sign-in sheet can be used to register any walk-on guests and to capture the email addresses of all attendees.

Nametags

Alumni Relations will provide you with blank Penn Alumni nametags that you can use at your event if you request a supply at least a month in advance of your event.

Nametags help guests meet each other – and remember the names of other guests. These can either be pre-printed in advance with your guest names or guests can fill them out when they arrive.

Some people prefer just first names, others prefer first and last, and many clubs like to list the Penn affiliation of attendees – whether it is alumni, students or parents.

Banner

A Penn banner provides a nice welcome to your guests when attending your event and brands it as a Penn event. You can hang it on your registration table, on a wall as a back drop or in another convenient location.

PennAlumni banners are provided as one choice of several possible rewards for clubs that complete the annual “Partners with Penn” form. You can also purchase one through Alumni Relations or from the bookstore on campus.

Photos

You should bring a digital camera to your events in order to take pictures. Please forward any good photos which highlight your event to your GAN liaison for use in future Penn publications or on the alumni website. These photos can also be posted on the GAN webpage listing for your club to help promote your club and its activities to local alumni.

Here are some sample club web pages with event photos:

Penn-Wharton Club of Arizona: <http://www.alumni.upenn.edu/club/arizona.shtml>

Penn Club of Istanbul: <http://www.alumni.upenn.edu/club/turkey.shtml>

Penn Club of UK: <http://www.alumni.upenn.edu/club/unitedkingdom.shtml>

RSVP requirements

We request that you send us the list of attendees at your events that feature Penn speakers. You can email or fax your GAN liaison the final attendance list.

Please ask your guest to provide:

- Name

- School and year
- Email address

If possible, it is also helpful to have them provide:

- Mailing address and phone number

If people register in advance, you can capture most of this information and then only need worry about having walk-on attendees provide this information to you.

Please encourage everyone to update their own contact information with Penn via our Alumni Online Community on the web. There is a link to this on the PennAlumni homepage at www.alumni.upenn.edu. The direct link is at <http://www.alumniconnections.com/Penn>. This helps us keep track of alumni in your region, and helps alumni receive the most up to date news, event details and other information from Penn.

Point person

When a Penn speaker is visiting your club for an event, you will need to coordinate with your GAN liaison to discuss who will be the main point people for the event.

The visiting speaker should have at least one contact number of someone from your club, as well as the phone number for the event location. If your GAN liaison or another representative from Alumni Relations/Penn is attending the event, they will most likely be the main point of contact for the speaker.

It is important for the visiting speaker and University representative(s) to be able to contact you if there is a problem en route to the event (delayed flight, missing luggage, missed flight/train, wrong directions, traffic, etc). Likewise, you will want to be able to contact the speaker if you have a problem on your end, or if you were expecting them at a certain time and they are late.

Please work with your GAN liaison to determine what would work best for your specific event.

Thank you notes and gifts

Since Penn speakers are **not** paid an honorarium for participating in Penn Alumni events, you should send them a thank you note, letter or email after the event. Many of our speakers truly enjoy traveling and speaking at our alumni clubs, but it is still an imposition on their time and we should demonstrate we appreciate their willingness to meet with your group.

It is also a nice gesture, but not necessary, to give a small thank-you gift. Something local to your area is always a nice touch. Be mindful that when traveling, heavy and/or bulky gifts are often difficult to carry home. If your gift is small and lightweight it is probably safe to give it to the speaker at the event. If it is heavy and/or bulky, it might be best to ship it to the speaker at their office at Penn.

Feedback

We are developing an online survey that you should complete within a week of your event to provide us with feedback on your event, overall, and on your specific speaker.

Until the survey is designed, please send an email to your GAN liaison with feedback from your event. It is helpful for us to know how successful you think your event was, and to see any innovative programming and planning ideas you implemented. We also appreciate feedback on individual speakers, which we will keep confidential. If the speaker talked too long, too short, didn't articulate well, had inappropriate comments, etc – these are things we need to know so we can evaluate if we would ask him/her to speak at an event in the future.

In your email, please list:

- Your name
- Club name
- Event date
- Event location
- Speaker
- Event format (dinner, reception, lunch, panel, etc).
- Feedback on the speaker
- Feedback on the venue
- Overall event feedback

EVENT DETAILS

Venue Selection

Probably the most important element of your event, besides the speaker, is the venue location. While some clubs have been hosting events for many years, others are just starting to plan events.

Which venue you select will depend on the format of your event and the anticipated size of the audience. Possible locations include hotels, country clubs, restaurants, libraries, schools, churches and private homes.

Seating and Room Layout

The most common way for arranging audience seats at a speaking event is “theater style” which basically means rows of chairs set next to each other with usually one, sometimes two, aisles up the center.

If your event is a seated dinner, often tables are set up as “rounds” – circular tables usually sitting 8 or 10 people

Generally it is best to have the speaker in the center of the room. If you expect a large attendance, you may consider asking if there is a raised platform or stage for the speaker. For a

panel presentation, you can set a long table at the front with each panel member seated at the table facing the audience.

AV requirements

Please check with your GAN liaison or your speaker to see if they have any audio visual (AV) needs for their talk. The most common AV needs are a podium and microphone. Often this is included at no additional cost at some venues. However other needs such as a screen, projector, wireless (or lavalier) microphone are usually an additional cost – and they are not cheap. Be mindful of this when making your venue selection and determining the cost of your event.

Cost

Most alumni clubs plan events so that the club does not have to spend any or little of its treasury on the event itself. You should charge an attendance fee for your event so that you cover your expenses.

Some clubs offer a discount on the entrance fee to dues-paying members of their club. This helps to increase their membership numbers.

Food and beverage

Food and beverage costs vary greatly depending on your venue, any food and beverage minimums that are required, and the kind of food you offer. You may contact your GAN liaison if you require specific guidance.