

# Carnegie Mellon University

## Alumni Association

### Event Planning Guide

Updated 2023

#### Event Planning Steps and Timeline

*Prior to organizing any events:*

- Complete the [Volunteer Confidentiality Agreement](#)
- Review and sign off on the Statement of Partnership

For most events, 4-6 weeks will give you plenty of time to plan your network event. For ticketed events or any event with a contract, allow 6-8 weeks for planning. Please confirm that **two** emails will be sent to the larger network before your event.

*The following steps should be completed 6 – 8 weeks prior to the event:*

- Select event, research logistics and complete reservation process as necessary.
  - Contact network leadership and CMUAA staff partner with event concept.
  - Research event logistics (i.e. dates, pricing, ticketing process) and confirm with network leadership and staff partner prior to booking the event.
  - Book event and purchase tickets as necessary.
    - Your CMUAA staff partner can purchase tickets by credit card if provided with a vendor contact name and pertinent information regarding ticket numbers and pricing.
    - If you purchase tickets on your own, please submit your [request for reimbursement](#) within 30 days of purchase.
    - Contracts are required for certain events. As a representative of the Carnegie Mellon University Alumni Association, you are not permitted to sign any contract. Please forward any contract to your CMUAA staff partner, who will submit the contract to the University Contracts Office for review. The contract review process can take up to 4 weeks, so please forward all contracts as early as possible.

*The following steps should take place 4 – 6 weeks prior to the event:*

- Prepare event marketing information.
  - Complete the [Event Submission Form](#) so that the event registration page can be built.
    - Forward your confirmation from the Event Submission to the network president and your staff partner
    - Your landing page will live on the [Alumni Online Community Events page](#).
  - Content is due by 5 p.m. on Wednesday, the same week your network emails are sent. Please refer to the Monthly Email Deadlines calendar on the [Volunteer Resources page](#).
    - If content is not submitted by the deadline, your event marketing will be postponed two weeks until the next network email.
    - Your staff partner will periodically provide you updates to the RSVP list for the event. You must have a signed Volunteer Confidentiality Agreement on file before this information can be provided.
  - Once the event registration site has been built, share the event via social media. All social media should point to the Alumni Association registration page for the event on the [Alumni Online Community Events page](#).

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*The following steps should take place 3 – 5 days prior to the event:*

- Confirm the event.
  - Confirm the event with the venue.
  - Send confirmation/reminder email to registered attendees.
    - Your CMUAA staff partner will provide you with a final RSVP list that will also be uploaded into Social Tables. You must have a signed Volunteer Confidentiality Agreement on file before this information can be provided.
      - Copy (**cc:**) the network leadership and CMUAA staff partner on the email.
      - Blind carbon copy (**bcc:**) all pre-registered event attendees when sending the email.
  - Download the [Social Tables app](#) to any Apple device
    - Log in to the app to confirm your pre-registration list is updated in the app. Your staff partner will provide you with the login information. DO NOT create an account.
    - If you do not have an apple device, please take attendance at your event using the excel document with your pre-registered list

*The following steps should take place on the day of the event/in the week following the event:*

- Attend the event and complete event follow-up.
  - Attend the event as host, using Social Tables to check in guests and greet all attendees. Social Tables syncs attendance automatically.
  - If possible, take photos of the event.
  - Provide a post-event summary to the network leadership and staff partner. This summary should include the following:
    - Brief event review
    - Attendance list (if not using Social Tables)
    - Your recommendations as to whether the event should be repeated.
    - Event photos, if applicable.

***Please remember that your network leadership and staff partner are available to provide support throughout the event planning process. Feel free to contact them whenever you have questions!***

#### Additional Notes:

- All events are self-funded; event income must recoup event cost. The university does not provide any funding for events.
- Hosting duties include coordinating logistics and creating a welcoming environment for all attendees. Hosts are not expected to assume the cost of any event.
- Registrations should only be taken by the CMU Alumni Association for events. Alumni, parents, students, friends and guests must register on the event landing page. You may add guests to your registration, but no event registrations should be made on behalf of other alumni. Facebook events and responses are not event registrations.