

Carnegie Mellon University

Alumni Association

Event Planning Guide

Updated August 2019

Event Planning Steps and Timeline

Prior to organizing any events:

- Complete the [Volunteer Confidentiality Agreement](#) for the Carnegie Mellon University Alumni Association (CMUAA).

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.
 - Download the Certain Arrive app to any Apple or Microsoft mobile device.
 - [Apple](#)
 - [Microsoft](#)
 - Certain Arrive [instructional video](#)
 - [Certain Arrive Instructions](#)

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 for the event
 - Forward your confirmation from the Event Submission to the network president or the leader in charge of requesting the network email. If you are the point person for network emails, please complete the [Email Request Form](#), as well.
 - Content is due by 5 p.m. Friday indicated on the [Monthly Email Deadlines calendar](#)
 - If content is not submitted by the due date deadline, 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.

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- 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. No other registrations will be accepted.
- Your staff partner will request your Certain Arrive unique ID for the event.

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. 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.
 - Familiarize yourself with the Certain Arrive instructions provided by the Carnegie Mellon University Alumni Association. Certain Arrive may be used by multiple people at an event by logging in with the email we provide in the instructional video/instruction sheet and the unique event ID.

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 Certain Arrive to check in guests and greeting all attendees. Sync and close out the attendance in Certain Arrive at the end of the event.
 - 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
 - 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 CMUAA 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 behind log-in, and no event registrations should be made on behalf of other alumni. Facebook events are not event registrations.