HAA Event Planning Guide

Suggested Event Planning Timeline

	Action	Suggested Timeline
1	Brainstorm event ideas and decide upon a final proposal.	10-12 weeks prior to event
2	Choose an event chairperson.	
3	Establish a planning timeline (including proposed event date).	
4	Establish a budget.	
5	Brainstorm a ranked list of potential speakers (if necessary) and send invitations to speakers.	
6	Research and select venue. Consider catering, AV, room-set-up, parking, etc. when selecting venue.	
7	Post event to Club/SIG Website.	7-10 weeks prior to event
8	Send a "Save the Date" to target audience.	
9	Once speaker has been selected, request marketing materials (including speaker biography, lecture title, and photograph) and AV needs.	
10	Plan for speaker logistics (for example, transportation to and from event, special dietary needs, lodging). As event details are confirmed, provide periodic updates to speaker.	
11	Create event registration plan and, if necessary, create online registration page via Alumni Magnet or another system.	
12	Send formal email or mail invitations.	5-7 weeks prior to event
13	Submit event for eVENTS newsletter and the alumni.harvard.edu events hub via: https://harvard.az1.qualtrics.com/jfe/form/SV_1RpqiEjr1yWlUhv For more details on how to submit events, email Moiramarie Notarstefano at moiramarie_notarstefano@harvard.edu.	
14	Market event on Club/SIG website, Facebook, Twitter, Newsletters, through email blasts, etc.	Begin 4-5 weeks prior to event and Continue throughout time leading up to event date
15	Track registrations, update venue as necessary.	
16	Create/Collect any event materials (for example, nametags, Club/SIG marketing handouts, speaker handouts, seating chart, etc.).	Begin 2-3 weeks prior to event and continue to update materials as needed leading up to event date
17	Create event briefing with directions to venue, event timeline, contact information for Club/SIG Leader, and any other necessary details. Assign event volunteers and/or board members to roles (such as host, welcome/introductions speaker, registration manager, etc.) Send to event leaders and speaker. **Send final briefing to speaker and Club/SIG leadership 1 week prior to event.**	
18	Confirm AV and final numbers with venue and catering.	2 days before event
19	Send event reminder to all registrants and speaker. Consider including reminders of event details such as time, venue address, dress code, etc.	
20	On day of event, event organizers should plan to arrive at the event approximately 60-90 minutes prior to the suggested arrival time for event guests to check on all venue details, set up registration table, and test AV equipment. If registration is being taken at the door, be sure to have a laptop to process online registrations with credit card and/or cash on hand to manage cash registrations. Be sure to count the number of attendees.	Day of event
21	Send post-event thank you email and survey to attendees through Survey Monkey, Google Form, or other platform (optional).	Day after event
22	Write thank you notes to any necessary parties, including speaker.	Up to 1 week after event
23	Post event write-up and/or photos on Club/SIG website, Facebook, Twitter, or other platforms.	
24	Pay all outstanding invoices to venue, catering, etc.	Up to one month after event
25	Reflect upon event with event planning committee and, if collected, analyze survey data to think about how to improve future events.	

Event Briefing Template

Event Title: _____

Host Organization: _____

Event Details:

- o **Event Date:** _____
    - ▪ Event Start Time: _____
    - ▪ Event End Time: _____

- o **Event Location:**
    - ▪ Venue Name: _____
    - ▪ Venue Street Address: _____
      _____
    - ▪ Venue Website: _____

- o **Marketing/Registration:**
    - ▪ Event Website: _____
    - ▪ Registration Page or Contact: _____

- o **Guest Details:**
    - ▪ Invited Parties/Demographics of Guests (ex: young alumni, club board members, etc.):
      _____
      _____
    - ▪ Expected Number of Guests: _____

Event Flow/Format:

Time	Action

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Contact Information:

- **Event Chair Person:**
    - Name:_____
    - Title: _____
    - Email:_____
    - Preferred Phone Number:_____
    - Cell Phone Number (for day of event):_____

- **Speaker:**
    - Name:_____
    - Title: _____
    - Email:_____
    - Preferred Phone Number:_____
    - Cell Phone Number (for day of event):_____

- **Venue Contact:**
    - Name:_____
    - Title: _____
    - Email:_____
    - Preferred Phone Number:_____
    - Cell Phone Number (for day of event):_____

Notes (this section can include any miscellaneous information, some suggestions are included below):

- Price of event
- Parking information
- Dress code
- Menu (including any special dietary requests)
- Room set-up/diagram and/or seating chart
- AV needs of speaker/club
- Talking points for welcoming speaker