



UChicago **Alumni** Association

EVENT PLANNING TIMELINE AND CHECKLIST

THREE MONTHS IN ADVANCE

- Come up with an event idea that meets at least two of the [programming criteria](#).
- Select a day of the week and time of day that best suits the event; keep in mind potential conflicts such as holidays or [Alumni Association signature events](#).
- Research potential speakers, if applicable.
- Research venue options and visit prospective sites.
- Research catering and get bids, if applicable; check to see if venue has a preferred catering list or in-house caterer.
- Research audiovisual needs, if applicable; check to see if venue has a preferred vendor list or in-house AV team.
- Research area logistics such as parking fees, local transportation, security.
- Determine event budget; the event must break even unless applying for [grant funding](#).
- Run your event idea and budget past volunteer leaders or the staff liaison to receive feedback.
- Work with the staff liaison to facilitate an invitation to the faculty speaker, if applicable.
- Apply for [grant funding](#), if applicable.
- Consider possible partnerships with other UChicago [Alumni Clubs](#) or [Affinity Groups](#) or alumni associations from peer institutions.

TWO MONTHS IN ADVANCE

- Select a venue.
- Select a caterer, if applicable.
- Submit an [Event Intake Form](#) to the Alumni Association 6 weeks before an event (must be 8 weeks in advance if the event requires print materials).
- Submit an [Event Payment Request](#).
- Get trained on the UChicago Community Online (UCCO) site to edit event and download event attendance list. (Program chairs or other volunteers who frequently plan events will be trained on how to manage the entire back end of their events.) Contact staff liaison to set up training.

- Submit and/or set up and publish the event on appropriate club/group UCCO site.
- Begin recruiting volunteers to help at the event, if needed.
- Monitor and update the club/group event on UCCO site as needed.
- Respond to alumni inquiries about the event.

TWO TO FOUR WEEKS IN ADVANCE

- Finalize catering menus.
- Order and confirm all audiovisual equipment and finalize room setup.
- Confirm speaker travel/accommodations, if applicable.
- Create and deliver a speaker briefing, including event logistics relevant to the speaker, if applicable.
- Conduct and work with other club/group volunteers to send peer-to-peer emails to boost registration.

TWO WEEKS IN ADVANCE

- Finalize event timeline and agenda.
- Check registrations and adjust estimate with caterer, if applicable.
- If registration is low, confirm against budget that the event will still break even. If projections indicate that the event will lose money, communicate with the staff liaison to discuss the possibility of canceling the event.
- Submit an [Event Box Request Form](#). Event boxes include supplies such as name tags, event décor, promotional items, UChicago giveaways. Volunteers should fill out the online form no less than 2 weeks before the event to ensure enough time for the box to arrive in the mail.

ONE WEEK IN ADVANCE

- Communicate by phone or email with the venue, vendors, speakers, volunteers, and anyone else involved with the event to confirm logistics.
- Send an email to remind guests that the event is coming up and to add any additional details about the program including but not limited to date, time, address, parking information, room location, day-of event contact.
- Print and/or assemble name tags and prepare any other event items, including check-in materials, décor, speaker gifts, camera.

DAY OF EVENT

- If you're responsible for distributing tickets at a game or public event, wear a UChicago hat or T-shirt so that attendees can easily find you.
- Arrive 30 minutes early to the event venue.
- Check in with the venue contact to reconfirm arrangements. Make sure the venue's staff know that you are with the UChicago event, so that they can direct guests to the appropriate location.
- Learn the location of restrooms and handicapped entrances.

- Set up registration area and name tags and place signage and UChicago materials.
- If collecting on-site payments, be prepared to collect cash or checks from walk-in attendees. *We are unable to process credit card payments for walk-in registration fees.*
- Check in with the event speaker once he or she arrives.
- Welcome guests (see best practices below).
- Take photos throughout the event.
- Stay until all guests have left, or if attendees remain long after the event end time, thank them for coming and say goodbye before leaving.
- Before leaving, be sure to check with the venue staff to ensure that bills are settled or invoices are sent to the staff liaison.

BEST PRACTICES FOR HOSTING EVENTS

During registration, greet all guests with a friendly “Hello” or “Welcome” and ensure that they sign in or that they are checked off on the sign-in sheet. Assist with name tags. Feel free to recruit additional alumni volunteers to assist in this effort.

When appropriate, a welcome speech from the event host should be brief and provide information about the club or group and mention a few future events and opportunities to get involved. Give a special welcome to newcomers and recent graduates, thank those who have helped with the event, and recognize any special guests or UChicago faculty or staff present. Thank all for supporting the University with their attendance and say a few words about the importance of the alumni network and the value of giving back to the UChicago community through attending, volunteering, and giving financially. 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 club or affinity group.

POST EVENT

- Update the registration list to reflect any no shows, cancellations, and final attendance numbers and send to the staff liaison. This information is critical for tracking and evaluating event and overall group success, keeping good records, and informing future opportunities for clubs and groups.
- Send the Alumni Association the final invoice from vendors or file for reimbursement, if applicable.
- If payments were collected on site, send them to the staff liaison within one week of the event using the prepaid FedEx label you received in the event box.
- Send other club/group volunteers and the staff liaison photos from the event and feedback describing how the event went and including any logistical issues that should be considered for future events (e.g., the venue space was awful for a lecture but would be ideal for a happy hour, the caterer was outstanding and should be used again).
- Send a thank-you email to all attendees, speakers, and volunteers.