OVERVIEW

event planning PROCESS

Read this through to get an idea of **high level items to consider when planning**.

10 - 12 weeks
prior to desired event date

1. DETERMINING THE EVENT
WHAT IS THE PURPOSE

» What is the purpose of this event (networking, inform, community building)? How does it align with the goals of the University or department you work with?

» Has this event been done in the past? If yes, have you reviewed the feedback and are you working towards improvements for this year?

» If the event has not been done before, be sure to connect with your Office of Advancement contact to discuss the idea, budget and resources. Cost recovery is always a good goal to strive towards.

2. DEFINING OBJECTIVES
WHO, WHAT, WHEN, WHERE, HOW

» **What** would you like the outcome of this event to be?

» **Create a Critical Path** — this will allow you to plan HOW your event can be effective and efficient by knowing all the tasks that need to be completed, **assigning responsibilities** to others, **setting realistic deadlines** and timelines.

» **When** will it take place? Where can it take place, who will attend, what is the potential audience size?

» Will the event be formal or informal?

» **Where**. Source a venue or event space options;

  • Find a venue that fits the look and feel you are hoping to achieve.

  • Things to keep in mind: what the budget is, will food be provided/required, and is it accessible for parking or public transit for most attendees.

» Review the Event Request Form for all the details needed to submit an event.

8 - 10 weeks
prior to desired event date

3. SUBMIT AN EVENT REQUEST FORM

» Define the information above into one document and share it with your Office of Advancement contact.

» Ensure you have the details needed to move forward with the event in a timely manner.

4 - 6 weeks
prior to desired event date

4. MARKETING AND COMMUNICATIONS
HOW WILL THEY KNOW ABOUT IT?

» Will this event require a broadcast email sent through the University?

» Social media — schedule regular posts about the event, review the **Social Media Guidelines** for tips on effective use of different platforms.

» If you would like to work with larger networks like UWaterloo Alumni to share your information, be sure to request that through your Office of Advancement contact.

» Consider if a post-event survey is needed, and work to create this before the event takes place.

ADVANCEMENT EVENT CHECKLIST

» Idea for event sent to University contact

» Budget Approved

» Venue, date and time confirmed

» Event request form submitted

» Communications and promotions plan created

» Agenda for the event, staff schedule created

» Final numbers and attendance sent to University contact

» Event summary completed

UNIVERSITY OF WATERLOO

5. EVENT IMPLEMENTATION
HOW WILL YOU EXECUTE IT

» Create an agenda for the evening, of how things should flow, timing of key elements like speakers, food, etc. Use the **Minute by Minute** as an example for a detailed plan.

» Review this with the team assisting to execute this event beforehand.

6. POST EVENT
REVIEW AND EVALUATE

» If an event survey is being sent, send within 24 hours of the event taking place.

» Schedule a feedback session for any team members involved in planning and executing the event to share high and low points of the entire process before, during and after the event.

» Complete an **Event Summary** form with all the details and submit it to your Office of Advancement contact.