



## 'Canes Community Events – Event Planning & Logistics

### GUIDELINES

- Long term planning is the critical foundation for all successful events. 'Canes Communities are strongly encouraged to create an Annual Calendar of 'Canes Community Events that can be implemented at the beginning of the fiscal year (June). An Annual Calendar of 'Canes Community Events ensures that all 'Canes Community Executive Board members are on the same page in terms of when events are scheduled to take place and that ample marketing and operational planning time-frames are provided for each event.
- Share your 'Canes Community's Annual Calendar of 'Canes Community Events with your UM Alumni Association Regional Engagement Staff Liaison.
- Determine the purpose/goal for each event. Examples of event goals include promoting a UM strategic initiative at the event, targeting the event to a specific type of constituency, etc.
- Use P.R.I.D.E. as a guide to plan a variety of different types of event. A concerted effort should be made to plan events that attract all segments of your 'Canes Community's constituency, including young alumni, alumni with children, older alumni, non-alumni sports fans, and parents. *\*Please refer to the [P.R.I.D.E. Programming Categories Section](#) for more information.*
- Know your constituency and match what type of events people attend in your geographic area. Remember, there is a lot of competition for people's time and interest. When planning an event it is important to be sure that you are offering something that your constituency is interested in attending.
- Check dates for possible conflicts with other events. Your 'Canes Community's UM Alumni Association Alumni Regional Engagement Staff Liaison can help you check for potential date conflicts with other University of Miami events in your geographic area. Also pay close attention to the holiday seasons, religious holidays, and peak vacation times when scheduling events.



## 'Canes Community Events – Event Planning & Logistics

### GUIDELINES (CONTINUED)

- For the majority of your 'Canes Community's events, you will need to rely exclusively on local 'Canes Community Executive Board members and/or volunteers to staff your events so it is important to determine how many volunteers will be needed to plan and execute the event. For bigger events that require significant volunteer staff resources, it is critical to plan as much in advance in possible to be able to effectively secure the necessary number of volunteers.
- 'Canes Communities are strongly encouraged to plan and execute events that have minimal associated costs. Examples of this include hosting complimentary events that are cash bar with food/drink specials and hosting events at locations that do not require an event space payment. Remember that the biggest draw for your 'Canes Community's events is the opportunity for guests to network and connect local University of Miami constituents and providing this can be done relatively cost free for your 'Canes Community with proper planning.
- When possible, try to identify ways to leverage local constituents' resources and skill-sets towards potential event opportunities. Examples of this include asking a prominent local constituent to speak at an event, and asking a local constituent with access to an event location to donate the space for a 'Canes Community Event. *\*Please refer to the [VIP Requests Section](#) for more information about the protocol for contacting VIP/prominent constituents.*
- Check with the local Chamber of Commerce, and Convention and Visitor's Bureau for interesting locations and event ideas. These organizations often publish guides that list activities and locations of interest.

## 'Canes Community Events – Event Planning & Logistics

### CHOOSING A 'CANES COMMUNITY EVENT LOCATION GUIDELINES

- 'Canes Communities are encouraged to take advantage of existing offers (i.e. food/drink specials) at local establishments to minimize overall event costs.
- Be sure to carefully determine all potential costs involved when using an event facility and ask for a written confirmation of all agreements. 'Canes Communities are strongly encouraged to select event locations that have minimal associated costs.
- Check to see if any of your 'Canes Community's Executive Board members have access to an event space, such as a private country club or an event facility at their place of business.
- Consider using a facility which already has entertainment or a focus/theme built into it, such as a winery, museum, aquarium, historic site, performing arts facility, etc.
- If the event involves a speaker or a speaking program, be sure that the event facility has a room or area that is private. Also, check to see if A/V equipment is provided by the event facility.
- 'Canes Communities are strictly prohibited from selecting event locations that have discriminatory policies or could be offensive to constituents. Examples of prohibited event locations include country clubs with discriminatory membership policies, and adult-themed establishments.
- Other factors to consider when selecting an event location include:
  - Number of people the event facility can accommodate.
  - Appropriateness of layout for the type of event.
  - Proximity/convenience of location to where your target constituents live/work.
  - Bad weather plan/alternate location for outdoor events.
  - Hours the facility is available (including set-up and break-down).
  - Adequate space to set up registration/welcome tables.
  - Adequate parking availability for guests.
  - 'Canes Communities are encouraged to host events that are smoke-free, in accordance with the University's designation as a smoke-free campus.



## 'Canes Community Events – Event Planning & Logistics

### SUGGESTED EVENT PLANNING & LOGISTICS TIMELINE

- **BEGINNING OF THE FISCAL YEAR (JUNE):**
  - Finalize Annual Calendar of 'Canes Community Events and ensure that event date (or approximate event date) is listed on the calendar.
  - Determine who from your 'Canes Community Executive Board will be the lead for the event.
  
- **SIX (6) TO EIGHT (8) WEEKS BEFORE EVENT DATE:**
  - Finalize and confirm as many key details as possible for the event. Key details include event location, start/end time, tentative event schedule/agenda, food/drink specials, registration/ticket prices (if applicable), etc.
  - Finalize marketing strategy for the event.  
*\*Please refer to the [Event Marketing Section](#) for more information.*
  - Communicate with your 'Canes Community's UM Alumni Association Regional Engagement Team Staff Liaison regarding any special requests for your event (i.e. event materials such as nametags, special event marketing, etc.)  
  
**Important: Special requests for event support will be evaluated by the UM Alumni Association Regional Engagement Team on a case by case basis and requests will be fulfilled based on a number of factors, including resource availability.**
  
- **FOUR (4) TO SIX (6) WEEKS BEFORE EVENT DATE:**
  - Begin event marketing and continue marketing efforts for at least four (4) weeks prior to the event date with weekly e-mails, social media outreach, etc.  
*\*Please refer to the [Event Marketing](#) section for more information.*
  - Finalize event staffing needs and confirm availability of 'Canes Community Executive Board members and volunteers needed to staff event.

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### SUGGESTED EVENT PLANNING & LOGISTICS TIMELINE (CONTINUED)

- **ONE WEEK BEFORE EVENT DATE:**

- Coordinate with event location to determine date/time when final guest count is due (if applicable).
- Finalize and confirm event logistics with event location (i.e. food/beverage needs, A/V requirements, registration set-up requirements, etc.). If possible, try to schedule a walk-through with your contact at the event location.
- Finalize and confirm supplies needed for event. Suggested event supplies include nametags, sign-in sheets, business card drop, signage, marketing brochures/collateral, giveaway items, decorative items, office supplies, etc.  
  
**Important: If you are hosting a paid event and will be taking walk-up orders, please be sure to have the necessary means to be able to accept payment at the event location. Please note that in accordance with the UM Alumni Association Constitution and Bylaws, the UM Alumni Association cannot process any type of payment collected at a 'Canes Community-hosted event.**
- Conduct a pre-event briefing with all event volunteers. This briefing can be done in person, via a conference call or by e-mail. Be sure to confirm what time volunteers should arrive at the event location and also review their roles/responsibilities.

## 'Canes Community Events – Event Planning & Logistics

### SUGGESTED EVENT PLANNING & LOGISTICS TIMELINE (CONTINUED)

- **DAY OF THE EVENT – BEFORE EVENT BEGINS:**
  - Arrive at the event location least one hour before the event start time.
  - Set-up registration/welcome table(s). Examples of items to put on registration tables include nametags, sign-in sheets, R.S.V.P. reports (if pre-R.S.V.P./registration was used for event), business card drop, office supplies (i.e. pens and sharpies), decorative items, etc.
  - Conduct a pre-event walk through with volunteers to ensure everyone knows the layout of the event space.
  
- **DAY OF THE EVENT – DURING THE EVENT:**
  - Stand (attentive, alert and friendly) at all times.
  - Greet guests with a smile.
  - Provide guests a space to sign-in and/or write their nametags.
  - Be sure to collect engagement information during the event.  
*\*Please refer to the [Constituency Engagement Data Collection Section](#) for more information.*
  - Ensure that food/beverage is adequately and promptly served.
  - Trash and used silverware should be moved out of guests' way.
  - If you have a cell phone, have it within your reach and turned on so you can hear or feel it if someone needs to contact you for an event-related issue.
  - Be sure that the registration/welcome area is staffed at all times.
  - Designate an event volunteer to take photos during the event.
  - Be prepared to resolve any issue during the event. Be sure to know how to reach your contact at the event location at all times.
  - All event volunteers should stay until the end of the event.



## 'Canes Community Events – Event Planning & Logistics

### SUGGESTED EVENT PLANNING & LOGISTICS TIMELINE (CONTINUED)

- **AFTER THE EVENT:**
  - Clean up event space and take everything you brought with you that is not trash.
  - Send a thank you letter/e-mail to event volunteers, and event guest speakers (if applicable).
  - Send a thank you e-mail/event follow-up e-mail to event guests via the 'Canes Community Mass E-mail System.
  - Complete and submit 'Canes Community Event Wrap-Up Form.

#### [LINK TO 'CANES COMMUNITY EVENT WRAP-UP FORM](#)

*\*Please refer to the [Constituency Engagement Information Collection Section](#) for more information.*

- Conduct a debriefing with event volunteers to evaluate what went well with the event and what needs to be improved upon for future events.
- Upload event photos on your 'Canes Community's webpage and social media outlets.