

College of Arts and Sciences



Advancement Event Toolkit

July 2024



THE COLLEGE OF ARTS+SCIENCES

Table of Contents

A) Event Planning Tip Sheet

i) Sign-In Sheet Template

B) Event Budget Template

C) Event Emergency Plan

D) Post-Event Survey Tips

Appendix:

i) Volunteer Guidelines

ii) Helpful Contacts



The College of Arts and Sciences' Event Planning Tip Sheet

- Selecting a Venue
 - Things to consider:
 - Anticipated attendance
 - Type of event: seated dinner, cocktail hour, lecture, etc.
 - ADA Accessible
 - Parking
 - Cost of rental
 - Rental of tables and chairs
 - Catering restrictions
 - Make sure to fill out the UERC Form (Required for all events of 50 or more people) - <https://universityevents.iu.edu/events/event-guidance-registration.html>
- Clarify your audience
 - Who do you plan to invite to your event?
 - Make a guest list and consider:
 - A list of department faculty, staff, and students
 - Alumni invitation list (Can request here)
 - Faculty, staff, and students from other areas who participate in your regular events
 - Community members
 - Local Retirement communities
 - Upper administration
 - Legislators (who might be interested in the event)
 - Local friends and donors (Can request here)
- Creating A Registration Link
 - Can be done through Qualtrics or MachForm
 - For online programming, please use the registration function affiliated with the virtual platform. Zoom is recommended for all online programming.
 - Do not forget to send out an event reminder leading up to the event:
 - Ideally the original invitation will go out 4-6 weeks in advance
 - a reminder 2 weeks before
 - a final reminder 2-3 days ahead of the event



- Date Selection
 - It is diplomatic and professional to consult the Religious Holiday Calendar prior to selecting a date for your event
 - Review the Events Calendar to see if another event might conflict with your intended event day and time
- Funding
 - You are invited to apply for a College Alumni Engagement Grant at: <https://college.indiana.edu/landing-pages/forms/alumni-grant-application.html>
 - Consider using our **budget template**
- Travel
 - Consider if your guests will be traveling from out of state and if booking hotel rooms at the Indiana Memorial Union's Biddle Hotel would be beneficial. You are able to place room blocks ahead of time and have them released prior to your event if guests do not need them.
- Food
 - It is recommended that you ask for any dietary restrictions in your registration so that you can accommodate guests and communicate this with your catering vendor.
 - Consider placing your catering order as early as possible.
- Marketing
 - Need help creating an event invitation for your alumni and friends? Contact the College's Office of Advancement.
 - Utilize social media and send personal invitations to your network.
 - IU Branding - <https://www.iu.edu/brand/tools-resources/downloads/custom-marketing-lockups.html>
 - Add your event to IU LiveWhale. Tag the College of Arts and Sciences and the College's Office of Advancement.
- Preparing for the Event:
 - Make sure to ask for staff support ahead of time. Keep in mind that you will need support for:
 - Checking in attendees – **sign in sheet**, nametags
 - Communicating with vendors
 - Interacting with attendees
 - Maintaining run-of-show
- Emergency Plan
 - It is important to have an emergency plan for your event, like this **example**.



- Volunteer Guidelines
 - **Volunteer Agreement**
- Virtual Events
 - At minimum, a virtual event platform should offer:
 - Live event streaming.
 - Event registration pages.
 - Event emails.
 - Live chat, polls, and Q&A.
 - On-demand access.
 - Performance analytics.
 - The College's Executive Dean's office utilizes Zoom for our virtual events as it allows you to create webinar registrations, track RSVPs, send reminder emails, save recordings, and email follow-up with attendees.
 - It is recommended that you practice using the virtual platform ahead of time before your event.
- Post-Event Tasks:
 - Thank participants guests, and staff
 - Send out post-event **survey**, if applicable
 - Send your attendance list to the Office of Advancement and be entered to win a \$200 credit towards catering for a future event.



Some special tips from the office on check-in tables:

- Be sure to have your table or multiple tables in the egress so guests don't miss it!
- Pay special attention to where guests will be standing as a check-in line may get backed up. You don't want some guests in doorways, outside, or blocking emergency exits as they wait to check in.
- If you are doing name tags or drink tickets have a separate table for these things.



Event Budget Planner

Organized by: _____
 Telephone: _____ (daytime) _____ (day of Event)
 Mailing Address: _____
 Email Address: _____
 Event Name: _____
 Purpose: _____
 Target Audience: _____
 Date: _____ Time: _____
 Location/Venue: _____
 Expected Attendance: _____ Admission price: \$ _____/per person

Estimated Total Budget: \$ _____

Projected Expenses:

| | |
|--|----------|
| Facilities/Room Rental Fee | \$ _____ |
| Set-up Fee | \$ _____ |
| Rentals (includes audio-visual, tents, tables, chairs, restrooms, etc.) | \$ _____ |
| Food | \$ _____ |
| Beverage | \$ _____ |
| Bartender Fee | \$ _____ |
| Promotional Materials (printing, mailing, signage, programs, etc.) | \$ _____ |
| Decorations | \$ _____ |
| Entertainment | \$ _____ |
| Transportation (buses, vans, valets, etc.) | \$ _____ |
| Miscellaneous (includes speaker travel, giveaways, awards, supplies, etc.) | \$ _____ |

Estimated Total Expenses: \$ _____



EVENT NAME
EVENT DATE
EVENT LOCATION

Emergency Plan

In the event of an emergency:

1. Call 9-1-1 (medical or fire)
2. Notify the event manager
3. Contact Campus Police, (812) 855-4111
4. When situation has resolved itself, contact Risk Management to complete an incident report

If a guest is intoxicated and/or becoming violent:

1. Notify the event manager and then call Campus Police, (812) 855-4111
2. When situation has resolved itself, contact Risk Management to complete an incident report

In case of a fire:

1. Activate fire alarm if not already sounding and call 9-1-1
2. Assist guests to the exits
3. Once outside, direct guests to the **FIRE LOCATION**; roadway must be kept clear for fire personnel

Important things to remember:

- Do not enter the situation unless it is safe for you to do so
- Deal with the situation first
- Remain calm
- Try not to alarm guests if it is not necessary
- Remain with the injured party or at the scene until help arrives
- If you are unable to reach the event manager and it is an extreme emergency (imminent life and death or fire), call 9-1-1
- Know where the exits are located in case of an evacuation and have an evacuation plan in place
- Knows for each event you are coordinating who your venue contact is and where that person is located during the event
- More Information can be found here: <https://protect.iu.edu/emergency-continuity/index.html>



IU Bloomington emergency contacts

Emergencies: Call 911

IUPD: 812-855-4111

Safety Escort: 812-855-SAFE (7233)

IU Emergency Management & Continuity:

812-855-2004 Sexual Assault Crisis Line:

812-855-8900

Crisis and Suicide Hotline: 812-855-5711



Post-Event Survey Tips and Examples

Tips for a Successful Survey:

- Both Qualtrics and MachForm are good options
- Send a mailing that explains the importance of a survey before emails go out
- Adding {SURVEY} in subject line of email increases engagement
- Always be sure to explain in your email the length of the time a survey will take to complete
- Keep all surveys short and standard
- Surveys should be sent within 48 business hours of the event; 24 hours if possible!
 - Cued and then attached **actual** attendee list. Surveying guests that weren't able to make it due to cancellation, weather, emergency can skew data and shows poor organization.
- Do not ask if you can't change the outcome
 - Only things that go along with our goals and purpose of an event to determine its success
 - Don't ask about weather, food, entertainment, etc.

Things to Avoid:

- Words such as often, usually, generally in questions
- Hypothetical questions
- Abbreviations, acronyms, technical jargon
- A lot of open-ended questions
- Making all questions required to answer

Examples of questions you could include:

- This event strengthened my connection to Indiana University/College of Arts and Sciences.
 - Yes
 - No
- What aspect of [Event Name] was most meaningful to you?
 - Open-ended Question
- What is one thing we could do to make the [Event Name] better?
 - Open-ended Question



- On a scale from 1-10, how likely are you to attend future events held by [Department Name]?
 - Likert scale
- Would you please share why you chose that number?
 - Open-ended Question



The College of Arts and Sciences Event Volunteer Guidelines

A great event leaves an impression on not just the audience but your volunteers too. It is your responsibility to ensure that volunteers are equipped to perform whatever function they are assigned. Invest the time and effort to train them and not only are you likely to have a better-quality event but volunteers will return to help again and again.

1. **Define Your Needs-** Once you have a plan in place for your event, what roles/gaps could volunteers help fill? Imagine yourself as a guest from start to finish. Where would/could guests encounter volunteers during the event? What are volunteers helping you with at these spaces?
2. **Create Volunteer Roles and Responsibilities-** Once you have determined needs, create detailed to the nth degree job descriptions for various roles including the number of people needed to fill them. Always strive to include the ‘Why?’ of why help is needed. For example, ‘We need table setters to put all materials in this exact order to subtly elevate the look of this event’. Giving the ‘Why’ to tasks, even the mundane ones, helps engage volunteers better. This goes for written instructions, sign-up sheets, and a refresher on the day of the event.
 - a. **Ethical standards and core values**
 - i. In conjunction with the IUAA, we hold ourselves, our employees, and our volunteers to a high ethical standard. It is the intent of IU Alumni Association that its programs and operations be conducted in a manner which merits continued public trust and confidence.
 - ii. The IU Alumni Association operates under the following four core values that not only guide and drive our success, but inform our behavior: Collaboration, Commitment, Inclusion, and Pride.
 1. Collaboration: We work together to achieve common goals.
 2. Commitment: We serve each other, our alumni, and the university with professionalism and integrity.
 3. Inclusion: We work to create an inclusive culture that is committed to diversity, belonging, and equity.
 4. Pride: We share and celebrate the best of the past, present, and future of IU.
 - iii. [Read the full Code of Ethics and Standards of Conduct](#)
3. **Give People a Reason to Volunteer-** Here is the biggest ‘Why’ to articulate. “We need help to put on X event because we want to achieve Y that will help Z.” Tuning people in on the exact importance of the event will help attract the right volunteers.
4. **Write Messaging and Promote Your Volunteer Opportunities-** With the role/job descriptions written, the importance of the event articulated, and any incentives included, it is time to promote your volunteer opportunities. Craft your email including all pertinent information about the event (date, time, location). Have your **sign-up form** link embedded and ready to go. **Six weeks** of lead time gives prospective volunteers the best chance to make sure their schedules are clear.
5. **Communicate with Your Volunteers Often and Clearly-** You have recruited all the volunteers you need (Do you have a back-up list/plan in the event of no-shows?), now is the time for clear and consistent



communication to your volunteers starting with a sincere “thank you” for helping you out. Consistent communication between recruitment and the day-of-event (DOE) will help build a productive relationship that leads to greater success and reduces the likelihood of no-shows. If appropriate/needed, designate a volunteer to head up a particular area for the event e.g. Welcome Desk/Food Service etc.

6. **Train Your Volunteers Well-** Make sure **you** know how to perform any task adequately before you train your volunteers. For example, conducting a training session when you don’t know how to use a particular piece of technology properly does not inspire confidence. Remember that you may have to perform certain tasks in the event of exigent circumstances. Training includes items like parking, dress code, itinerary for the DOE, points of contact, emergency numbers, Emergency protocols e.g. a fire, and written instructions at their station or somewhere clearly marked. Reiterate expectations, the importance of the relevant task and again, why the event itself is important. If you don’t have the expertise to train, call on a colleague who does and who is willing to train.
7. **Post-Event Volunteer Thank You/Survey-** Thanking your volunteers is essential! Congratulations, your role in our event made it a truly memorable event The audience loved it, and the volunteers had a good time as well. Thank your volunteers for making it a success. Fill your volunteers with the success of the event and what you all achieved **together**. Follow up with a survey to get feedback on the volunteer experience. There will always be something That can be improved even at a very successful event. When properly thanked, volunteers will appreciate being able to contribute feedback about the event. This last step helps ensure good volunteers return to help with your next event.



Helpful Contact Information

Indiana Memorial Union Biddle Hotel Rooms:

Brandi Clark

bkc3@iu.edu

Indiana Memorial Union Room Reservations and Event Services:

Caitlin McKinley

caimckin@iu.edu

Indiana Memorial Union Catering:

iucater@iu.edu

Alumni and Donor List Requests and Alumni Engagement Questions:

Haley Russ

hruss@iu.edu

Department Mailers and Newsletters:

Raymond Fleischmann

rfleisch@iu.edu