***\*\*We prefer you to use this document in Google Docs if you are comfortable; maximizing on the collaborative nature of the program with real-time editing, and saving the document on the Cloud.***

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| **A. General Event Information** - *please include as much information as you have, as relevant.* | |
| Project lead & co-lead: |  |
| Purpose and anticipated outcomes of the event: |  |
| Event description - *program, speaker details, any partnerships to note* |  |
| Date, time, cost per ticket, location & full address |  |

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| **B****. Marketing information** - *please include as much information as you have, as relevant.* | | | |
| Do you need a registration site to collect RSVPs - Y/N: | |  | |
| Are you advertising registration on any type of print material?  Therefore, do you need a shortened URL to be used for a print piece? Y/N  i.e: uab.ca/lawsocial | | *Will you have any type of print promotional piece about the event - a handout, brochure, other?* | |
| Mailing List *- who will receive the invite (specific graduation years or all alumni?), in which geographic region(s), are there any exceptions?* | |  | |
| What is the maximum capacity for the event and minimum registration number? | | *Max Capacity:*  *Minimum Registration Number:* | |
| **Special Invites:**  Should anyone from the Faculty or student group be invited; or sent the invite as an FYI?  Are there any community people or VIPs who should be invited? | |  | |
| **C****. Event details** - *For paying any hospitality bill we need attendee lists, and all original receipts. We prefer to reimburse a single person if possible.*  *The cost per person for alcohol cannot exceed $25. The cost per person for a meal should be no more than ~$20, and $15 for a reception format.*  *Attendee lists should ideally be submitted in an Excel sheet and should include First Name, Last Name, and UAlberta degree information -program and graduation year (i.e. BSc 2009, MBA 2013).* | | | |
| Will alcohol be served? What risk management measures are being taken? | | *Requirements:*  *-pro-serve trained bartenders, list of taxi companies/phone numbers available at reg table and/or on a sign, food served, non alcoholic drinks available etc* | |
| Will you need nametags for your event? Preference for sticky labels or lanyards? | | *Is there any special information you want on the nametags? Generally we do first name, last name, degree information i.e.*  **Joe Smith**  **‘78 BSc, ‘85 MA, ‘90 PhD** | |
| Event materials -*do you need Alumni Association banners, tablecloths, copies of New Trail, or small giveaways at your event?* | |  | |
| **D****. Electronic Invitation** *- An example of a standard invite is provided below*  Please fill in the proposed exact language to be used. It may be shortened or edited by the Chapters staff. | | | |
| Subject Line: |  | | |
| Title and Text of Invite: |  | | |
| Detailed program timing: |  | | |
| Do you have an image to be used as the invite banner? If not, we can find a stock photo, please provide a description to guide our search: | | |  |
| Do you want to include your Chapter subunit logo or your Faculty logo on the invite? | | |  |
| RSVP Deadline- *recommended 2 days before event* | | |  |
| RSVP Contact- *recommended Chapters staff, if not, please specify* | | | Vi Warkentin  [chapters@ualberta.net](mailto:chapters@ualberta.net) 780 492 2896 1-800-661-2593 |

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| **E****. Important dates and timeline -** *to be filled in by Chapters staff* | | | | | |
| **Invite draft sent to volunteer leads - 24 hrs to revise** | *2 days before invite #1 sent* | **Reminder invite** | *~2 weeks before event* | **Post-Event Survey sent to attendees** | *2 business days following event* |
| **Send out: Invite #1** | *~4-6 weeks before event* | **See you there info email** | *2 days before event* | **Post Event Summary Report due to Coordinator** | *2 weeks from event* |

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| **F****. See You There** info email - *this email is sent ~ 2 days before the event as a reminder to attendees and with detailed event information. Unless otherwise specified, it will be sent from the chapters@ualberta.net account to all those who are pre-registered.* | |
| Subject line: |  |
| Body text- *include event title, date, time, location, program timing, parking, process for walk-ups (additional tickets available), special instructions, etc.* | *i.e. “We look forward to seeing you at the Student-Alumni Mentorship launch on September 30, 2016 at the Faculty Club. Below are some important event details for you to know..”* |
| Do you want to link to the chapter, faculty or a research webpage, or social media accounts? |  |
| Anything else for us to know or include? |  |

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| **G****. Post-Event Thank You & Survey** - *it is Office of Alumni Relations practice to send out a post-event thank you and survey to all attendees two business days following the event. This means we need your attendance names immediately following the event in excel format, preferred. Please provide the language you would like to be included in the email. Below are the standard questions we ask for the survey. If you have concerns on this, please list them in the comment row provided. Unless otherwise specified, it will be sent from chapters@ualberta.net. We will share the survey results with you two weeks following the event.* | |
| Subject line: |  |
| Body text: -do you want to link to the chapter or faculty webpage or social media accounts? |  |
| Who should receive the survey results - *name & email* |  |
| Other comments: |  |

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| *Survey questions:* | |
| *Survey template found at:* [*https://www.surveymonkey.net/r/Preview/?sm=YLH3cAqqGr YFzEskjHW87Sa9AUr3AU8uI4zjvYAhyX4\_3D*](https://www.surveymonkey.net/r/Preview/?sm=YLH3cAqqGrYFzEskjHW87Sa9AUr3AU8uI4zjvYAhyX4_3D) | |
| *1. Did you attend this event?* | *Yes/No* |
| *2. How would you rate this event overall?* | *(Poor- Fair-Good-Very Good- Excellent)* |
| *3. How likely are you to recommend this event or one like it to someone with similar interests and background?* | *(0-10 Scale)* |
| *4. Why did you answer this way?* | *(dialogue bubble)* |
| *5. How would you rate the presentation by SPEAKER XYZ?* | *(0-10 Scale)* |
| *6. Do you have any suggestions for future speakers, topics or events that you would like the Alumni Association to provide?* | *(dialogue bubble)* |
| *7. Periodically we reach out to hear more about your experiences at UAlberta events. If you wouldn't mind a follow-up phone call or email, please fill in your name and contact information here.* | *Name, Email, Phone* |
| *8. What is your age?* | *(17 younger, 18-23, 24-35, 36-49, 50-64, 65-74, 75+)* |

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| **H****. Example electronic invitation:**  Image banner  Title & Body Text  Event Details  Links directly to the registration page or a landing page on the UAlberta Alumni Website  Staff contact information  Chapter logo  The footer information is mandatory per CASL legislation |  |