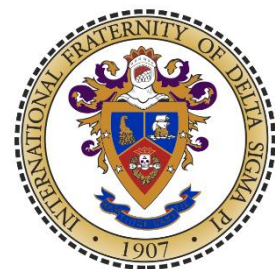


EVENT PLANNING TOOLKIT

Planning anniversaries,
reunions, and similar events
to engage Deltasig alumni

**DELTA SIGMA PI
PROFESSIONAL
BUSINESS
FRATERNITY**



Introduction

Congratulations! It is time to celebrate!

There is no rulebook on planning anniversaries, reunions, and similar events because no two chapters are the same. Your event should be as special and unique as your chapter. This toolkit is designed to assist you in planning your celebration and will help you consider different things when planning your event so it is historical!

There are a number of reasons for the chapter to host an event with a large alumni presence—and these reasons may have lasting effects.



Planning Checklist

Ideally, major event planning is best begun well in advance (even years before the event). But don't despair—great success can still be achieved if you start today!

NEED HELP OR SHORT ON TIME?

Keep an eye out for these tip boxes to help you along the way.

12-18 months prior to event

- Appoint a collegiate and alumni member to chair the planning committee
- Start making considerations about the type of event
 - Find out what resources are available (some places to start include your alumni association on campus and your business school)
 - Contact campus alumni association
 - Brainstorm tentative dates—[learn more about selecting a date](#)
 - Start researching venues and vendors
- Review the chapter funds and start working on a budget for the event
- Promote an upcoming celebration and ask for volunteers to assist
- Build relationships with alumni so they can help you plan and/or will be more likely to attend
- Work with the chapter VPAR to get alumni lists

8-12 months prior to event

- Finalize the planning committee members and schedule regular meetings to decide elements of the event including promotion. Delegate tasks to different members.
- Narrow down event dates and promote in existing communications
- Finalize event budget and begin fundraising plans—[see budgeting](#)
- Narrow down venues and caterers
- Continue updating alumni lists—finding members, updating contact information, etc.

6-8 months prior to event

- Finalize event activities
- Book venue(s)
- Book vendors (caterers, entertainment, etc.)
- Reserve hotel room blocks (if applicable)
- Mail and email save-the-dates
- Continue promotion of event

4-6 months prior to event

- Set up event webpage

- Order formal invitations and thank you notes
- Choose award recipients and presenters and formally invite those special guests
- Order awards/certificates of recognition ([nominate Helmet recipients](#))
- Order favors
- Continue promotion of event

2-4 months prior to event

- Mail formal invitations (printed preferred)—6-8 weeks prior
- Begin collecting registration RSVPs and money
- Finalize menu selection/order cake
- Continue promotion of event

Final Preparations

- Contact and confirm vendors - confirm headcount, if needed
- Provide schedule of events to speakers and award presenters
- Put together welcome packets with schedule of events, if needed
- Assign roles to committee members and chapter members for the event

Post Celebration

- Share photos and stories about the celebration with attendees and other alumni members
- Send press release with photos of the event to magazine@dsp.org
- Write and send thank-you notes
- Complete evaluation of the event



Mu Rho at Colorado State - 30th Anniversary

Planning

You are not alone!

Planning a major event is no small task...it requires time and effort! Establish a planning committee of interested and committed brothers. Appoint a collegiate and alumni member to chair the committee. Invite others to be a part of the committee or to assist on different aspects of the planning:

- Alumni members (initiated from the chapter and alumni living in the area)
- Local alumni chapters
- Local Fraternity leadership (District Director, Assistant District Director, Chapter Advisor, Regional Vice President)
- Faculty initiate and other university/institution personnel (example: your local alumni association)
- Central Office staff

Ask brothers who are not already serving in a volunteer position or have other major commitments in- or outside of the Fraternity.

Alumni members can be very beneficial and may have valuable resources at their disposal. They:

- May be great resources for chapter history
- Can be helpful in planning or taking on planning tasks
- Have access to alumni members to assist in locating "lost members" and inviting peers to the events
- Can provide financial contributions
- Have connections within the campus and/or local community that would assist in planning

Selecting a Date

If you are planning an anniversary celebration, ideally you would plan the event as close to your chapter's anniversary as possible. Unfortunately, this may not be an ideal time though. Be sure to consider the following that may impact people attending your event:

- Fraternity events
- University/institution calendars (breaks, finals, sporting events, parents' weekends, etc.)
- Large scale community/city events (sporting events)
- Holidays and observances
- Weather



Determine if the event is a single event or multiple events over the course of a weekend. You may decide to tie the event to other campus, community or chapter events. Either way, consider your

audience. If you expect many people to attend from out of town, they may be more willing to attend if there are multiple events to attend.

Some events to think about tying your celebration to include:

- Initiation
- Building dedication on campus
- College anniversary
- Homecoming
- Campus alumni/reunion weekend
- Founders' Day/Chapter Birthday
- Chapter awards and/or alumni recognition

Audience/Guest List

Who are you inviting to the event? Beyond current collegiate and alumni members of the chapter, consider these other groups of people.

- Local alumni members, family, friends and other guests
- Any other special guests of honor (speakers, honorary initiate(s), award recipients)
- National leadership: Grand President, Provincial Vice President, Regional Vice President, District Director, Leadership Foundation Trustees and Central Office staff (See [Chapter Locator](#))
- University/institution officials (such as business school dean), including Chapter Advisor and faculty initiates
- Other local collegiate and alumni chapter members
- Pledges

Work with the chapter VPAR and VPCO to get an up-to-date member listing. As you get any updated information, work with them to ensure it is updated accordingly.



Iota Nu at Truman State (MO) - 35th anniversary

Budget

Creating (and sticking) to a budget is important in planning a successful event. Whether the chapter hosts an informal tailgate or a formal banquet, be sure to budget accordingly.

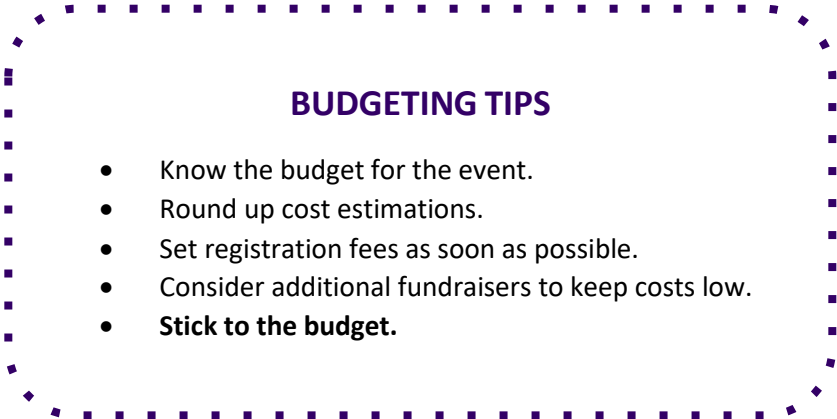
Once the chapter approves to host an event, the chapter will also need to determine how much money the chapter is willing to spend on it from chapter funds. After researching venues and vendors, the committee will have a better understanding of the costs. Knowing the costs and how much money the chapter currently has will allow the planning committee better determine an appropriate budget.

Revenues

Is this event free of charge or are you going to charge a registration fee? It would be great if the chapter could fundraise enough money to have a free event, but this isn't always feasible. Once the budget is approved, the chapter will determine if a registration fee will need to be collected based on costs of things. Guests, including chapter brothers, typically will pay some fee to help cover all event costs (not just for food).

Whether the chapter wants to raise money for a chapter scholarship, your Chapter's Leadership Fund, a special project or local charity, take advantage of this occasion to ask for help. The large number of guests at these types of events will mean the chapter's impact will be greater. Instead of charging an admission fee or ticket cost, consider encouraging guests to bring donations. Alternatively, if you do charge admission, ask for a small donation in addition to the registration cost. Also consider holding a fundraiser at the event, such as selling merchandise, holding a silent auction or hosting a raffle. (Before hosting a raffle, be sure you are following all local policies and laws—raffles may not be local and/or may require you to have a license.) Just be sure to not make the entire event about fundraising as you may distract from the main goal of the event—brotherhood. Contact foundation@dsp.org to get some materials to help promote Leadership Foundation donation options to support your chapter.

The chapter may also consider applying for money from the university/institution as there may be funds available for student organizations. For larger events taking place on campus with a large number of alumni and guests, the university/institution may be willing to support the event with funds or other resources.



BUDGETING TIPS

- Know the budget for the event.
- Round up cost estimations.
- Set registration fees as soon as possible.
- Consider additional fundraisers to keep costs low.
- **Stick to the budget.**

Expenses

Items to budget for (This list is not comprehensive and your chapter may have other expenses to consider including parking, hotel rooms, etc.):

- Rental Fee for location and additional items like tents, tables, chairs, dinnerware and more

- Food or catering costs
- Bartenders (see [Risk Management Policy](#))
- Venue security
- Clean up or custodial fees
- Insurance (see insurance policy)
- Printing and/or postage
- DJ and/or sound equipment rental
- Decorations
- Invitations (and postage or mailing service fees)
- Favors/Giveaways
- Certificates/Awards
- Photographer/Videographer



Theta Sigma at Central Florida

Venues and Vendors

When planning the event, the committee should take into account the culture of the chapter and its members. A formal banquet may not be for every chapter and it is the committee's responsibility to find appropriate venues and vendors.

Selecting Your Venue(s)

When selecting your venue(s), the committee will need to think about:

- Amount budgeted for the venue
- Catering options, including dietary restrictions
- The number of guests/capacity of the venue. If a location has a limited capacity, you will need to know before finalizing your invitation list. This might also impact if guests and family members are allowed.
- What is included in the cost of the venue? Does it cover the costs of tables and chairs, dance floor, linens for tables, etc...? Are there any restrictions?
- Types of activities and flexibility of adjusting room layouts/tables to meet your needs
- Restroom access
- Accessibility accommodations

- Reference the Appendix to help choose the venues, vendors and hotels.
- Have Central Office staff review all contracts before they are signed to ensure the chapter isn't taking on any unknown liability.
- Be clear when deposits and payments are due and organize a payment schedule.

One of the first places to consider may be campus locations, which may be cheaper and more convenient for your guests. If there are no options on campus, you may talk to your campus alumni office to see if they have any venues to recommend. Local alumni members may also be a valuable resource during this process as many may have hosted or attended events in locations that may be suitable for the chapter's event.

Also, the venue should be appropriate to the type of event. If you are planning a formal banquet, a more formal venue would need to be found.

Hotels may be good options to hold your event if you are planning for many out of town guests. The hotel may offer price breaks if you block a certain number of sleeping rooms. Be careful with this option though because you do not want to have to pay for unused rooms or other fees that may be associated with such a deal.

HOTEL BLOCK?

It may be difficult to reserve a room block if you are short on time or unsure of the number of attendees. Instead, provide a list of multiple local hotels in various price ranges on your event website and/or in the invitation.

Location of Venues

Venues should be easy and convenient to get to. Consider the following before selecting a venue:

- Distance to campus and/or hotel

- Ease and cost of parking (on campus or offsite)
- Closeness to other activities

Catering

If you are offering food at your event, check with your venue to in-house catering, but also look into other catering options also. Consider the following:

- Costs per person
- Included items (such as drinks like tea, water and coffee or salads and desserts). If desserts are not included (or even if they are), you may consider purchasing a cake from an outside vendor, but beware as some venues do not allow outside food including cake. You may have to order from the venue or make special arrangements in the contract up front.
- Children’s meal options (for those hosting family friendly events)
- Dietary restrictions and allergies, including vegetarian, vegan, Kosher and gluten free
- Although buffets may be a good option, they are usually more expensive and may require different health and safety protocols.
- Services fees may or may not be part of a quote. Be sure to ask about additional service fees that can be charged – as much as 25%, which usually cover the cost of gratuity for the catering staff.

Each chapter should decide its own policy for allowing alcohol at an event. Review your chapter rules, the National Risk Management Policy and your university/institution policies to ensure compliance. Allowing alcohol at the event may require spending additional funds on licensed bartenders. Fraternity events *may not* be open bar.



Rho Chi at Hawaii-Manoa

Entertainment

When planning for entertainment, consider the audience and your budget. If you want music playing during a meal or for a dance, consider having a member to play a well thought and appropriate playlist rather than hiring a DJ. You may also invite different performance groups from campus to perform.

Photography/Videography

The committee may decide to hire a professional photographer for the event. If not, a specific member (or members) should be responsible for taking photos and capturing some of the special moments. You may also rent or set up a photo booth. If renting, sometimes you can customize the photos to the event to make it more special while providing a memento to your guests. After the event, be sure to let attendees know where they can go to view, download or order images from the event.

Event Favors

You may want to provide a commemorative item as a thank you to your guests. Favors may also become part of the decor for the tables. It is recommended you do not put dates on items so they can be used for other purposes at a later date. If you do choose to customize them though, triple check dates and spellings before ordering.

Decor

Beyond purple and gold flowers or balloons, consider displaying historical items. Items to display include:

- Scrapbooks or photos, including composites (slideshow or on poster boards). Ask alumni members to send or bring copies of photographs to add to the display.
- A copy of the chapter's petition (may be available [online](#))
- Articles from past Deltasig magazines (search the magazine archives [online](#))
- Past T-shirts or event favors
- Letters from alumni unable to attend



Beta Epsilon at Oklahoma – 90th anniversary

Communication

You will want to inform your alumni about your event as soon as possible, providing as many details as you are able at each point in time.

When communicating, be sure to consider multiple mediums so you can access attendees on multiple channels; different audiences will respond differently to different communications. Beyond emails and newsletters, which are cheap and easy, consider sending printed invitations. Word of mouth can also be beneficial, so be sure to enlist your alumni to personally invite people they may know.

INCREASE COMMUNICATION

- Find leaders (chapter presidents or prominent alumni) from every couple of years and ask them to promote the event with personal emails and phone calls to brothers they know (classmates or brothers who live near them).

Dedicated Event Site

If you are able, create a webpage dedicated specifically to your event. The page will allow your guests to stay up-to-date on the details of the event as they become available. Ideally, members would also be able to register and submit payment for the event or make donations through the webpage also. If you do not already have those capabilities, consider an RSVP site (i.e. Evite or Eventbrite), but be sure to follow Fraternity financial policies.

Social Media

You should promote across multiple social media platforms to ensure the event details are seen by a variety of people. Social media should be used to inform guests about event details and encourage them to register and attend. It should not be a replacement for a formal invitation (even if the invitation is an email).

If your chapter has a Facebook page, create a Facebook event to share details and information with guests, but do not rely on a Facebook event to gather RSVPs, as you will probably need accurate numbers to plan accordingly.

Save the Date

A save the date message should be sent as soon as possible (after the venue and dates are secured and contracts are signed), preferably three to six months before the event. Sending them early will give your guests plenty of time to plan—especially those that may be traveling from out of town.

The chapter should at least email save-the-dates to the guest list. If your budget allows, also consider mailing save the dates. Consider sending save-the-date postcards, which will allow you to ensure you have good addresses for guests before mailing a more expensive invitation.

Be sure to also communicate the date, location and contact information to the Central Office and the university/institution alumni association in case any alumni contact either and to assist with additional promotion in their publications. And be sure to also send updates to be published in *The Deltasig* or at dsp.org/news.

Collecting RSVPs

Before sending out your invitations, be sure to select an appropriate RSVP date. When selecting the date, make sure you know the date your venue/caterer needs to know how many people to expect and/or your final number count. Some venues will charge you for this number of attendees, no matter how many actually show up.

Generally, your RSVP date will be about two weeks before your event, but you may plan it sooner so you have time to follow up with guests before your final numbers are needed.

Use your dedicated event site to collect your RSVPs. Be sure to collect names, guest names, any special accommodations, and meal selection (if applicable), including any dietary restrictions.

Invitations

Invitations should be mailed at least eight weeks before the event. Follow up emails and social media posts should continue up until the RSVP deadline of the event. It may take four to six weeks to have invitations printed, so plan accordingly. You may see if your university/institution has a print shop on campus—it may be less expensive than an outside vendor.

On the invitation, make sure to include:

- Venue information, including address, directions and parking information
- Date and time
- Schedule of events
- Costs to attend, if any
- Contact information for planning committee chair
- Attire
- Hotel information and deadlines for booking reservations, if applicable
- Special accommodations

COST OF MAILING INVITATIONS

Be aware that heavier paper, larger cards or adding inserts may increase the cost of postage to send your invitations. Before mailing, verify the cost to mail each invitation with the post office.

Limited Time? If you don't have time to mail save the dates or invitations, send invitations electronically to as many alumni as possible. Ask them to help spread the word to brothers they know.

ASKING FOR DONATIONS



Brothers who aren't able to attend your event may still want to support the chapter. Consider asking brothers to support the Chapter's Leadership Fund. (Gifts made via the Leadership Foundation are tax deductible as allowable by law.) Visit the Hub Dashboard or contact foundation@dsp.org for a direct donation link to your chapter's CLF. Be sure to recognize all donations by sending a thank you note!

Planning the Event

Your event may be tied to another event, which will dictate different activities and parts of the entire event. If your celebration is held in conjunction with another event (i.e. Homecoming, Founders' Day, etc.), be sure the anniversary remains in the spotlight. Your chapter doesn't have a milestone anniversary every year!

SMALLER EVENT

Not all events need to be large and extravagant. If you are limited on time or budget, a small celebration can be just as fun and effective of getting brothers together. Consider inviting alumni members to an already planned event. Or consider a low-key event like a picnic or reception.

For example, if you are having an initiation, you may consider also having an honorary initiate to help make this event unique and special. You will also want to be sure the activities are varied to appeal to a larger audience and determine if all of the events are family- or guest-friendly events.

- Luncheon or Family-friendly picnic
- Campus or Local Sporting Event
- Service Event
- Campus Tours
- Social Hour
- Initiation
- Banquet or Informal Dinner
- Game or Casino Night
- Brunch
- Memorial Service
- Recognition Program

As you plan your event, keep in mind how different activities might qualify for CMP credit. You may consider including some of these activities as part of the larger event:

- Professional event
- Service event
- Fundraising event
- Alumni Event
- Deltasig Faculty Event
- Founders' Day or Chapter Birthday Celebration
- Press Release for Special Events/Recognition
- Sponsor/Co-Sponsor Campus Event
- Co-Sponsor Inter-Chapter Event
- Faculty Appreciation Event (all faculty)
- Recognize Outstanding Alumnus

Sample Banquet Program

Banquets are common events planned for celebrations and large events. Here is a sample program for a banquet that can be customized to your chapter:

- Introductory Remarks by Master of Ceremonies
- Dinner
- Welcome by Chapter President
- Introduction of Honored Guests, including any National Leadership present
- Speeches/Presentations- see below
- Closing Remarks

Speech/Presentation Options

There are a large number of speeches and presentations you may consider during your event, whether it is a formal banquet or not. Contact and confirm speakers at least three months prior to the event. It is also a good idea to let each speaker know how long they have to talk to better plan the entire event. If one of these people are not able to attend in person, you may consider having them submit a short video to play during the event—just be sure to plan your technological needs ahead of time.

- Chapter History by charter member, alumni member or chapter historian
- Present Day Chapter by chapter president or another chapter officer
- Fraternity Future by National Leader
- Presentation from Grand President, Provincial Vice President or Leadership Foundation Trustee
- Presentations of Awards

You can also make an event more special by recognizing members who have given their time, talent, and treasure to the Fraternity. Here are just a few ways to honor distinguished brothers:

- Consider a certificate, small gift or other token of appreciation to thank your speakers. Your RVP, District Director and Chapter Advisor may be a good resource to help you decide how best to thank them.
- Introduce distinguished brothers in attendance. This includes National Fraternity leadership, Central Office staff members, Founding members.
- Present local awards such as an Alumni or Faculty of Year award or other certificates of appreciation.
- Recognize the accomplishments and commitment of young alumni members who have been members for at least a decade with the 10-Year Alumni Service Award.
- Present Helmet awards. The Order of the Silver, Golden, and Diamond Helmet is awarded to alumni with 25, 50, or 75 years or more, respectively, of membership and a record of support and service to the Fraternity.
- Acknowledge attendees by initiation or graduation year. Have them take a picture as a group and/or ask a member from each time period to share a story about what was memorable about their time as a collegiate member.

Preparing for the Event

- Contact and confirm order and date/times with vendors (caterer, bakery, venue, entertainment, etc.)—confirm headcount, if needed
- Confirm speaker(s), presenters and other and event participants—provide them schedule of events
- Put together welcome/registration packets with schedule of events, if needed
- Prepare nametags
- Prepare printed programs. Items to consider including in the program are:
 - Schedule of events, including speakers and those being recognized
 - Menu
 - List of committee members
 - Charter members (if an anniversary celebration)
 - List of after-dinner or program activities
- Hold special meeting with chapter to confirm details and assign support roles to committee members and chapter members for the day of the event (registration, event setup, decorations, etc.)
- Get everyone excited!

At the Event

- Arrange for a welcoming committee to supervise registration. Be sure to instruct brothers on how to meet and greet alumni and make them feel welcomed. Duties may include:
 - Handing out registration packets, nametags and/or tickets
 - Encouraging attendees to sign a guest book
- Post clear signs, directions for guests
- Have old scrapbooks and mementos on display that may be meaningful to others.
- Have a table with Leadership Foundation information and how to support the chapter with a tax-deductible donation.
- Arrange for a group picture of all alumni attending, including mention of when the picture will be taken in advance, publicity, programs.
- Be enthusiastic

After the Event

Congratulations, you did it! After the event, take a moment to reflect on all of your hard work!

Thank You

Delegate one person to send thank you notes to:

- VIPs who attended
- Supported any fundraisers/donated money
- People who were instrumental in the planning or execution of the event

Sharing the Event

You will want to share your event once it is over.

- Be sure to submit any necessary CMP forms for proper CMP credit.
- Create a subcommittee to post or share photos and videos with attendees, write press releases, create a scrapbook so the memories will be passed down and can be utilized at the next event!
- Create a press release to share with Delta Sigma Pi (magazine@dsp.org) and local campus or community papers. Be sure to include a description of the event and pictures from the event.

Evaluate the Event

Help your future brothers plan for the next event by carefully documenting what you did and your evaluation of the event. Include the following:

- Details of the events and decisions the committee made to get there (considered venues and vendors, contact information, costs, etc.)
- Proposed and final budgets along with receipts
- Evaluation from attendees (if applicable) and committee members

PROFITABLE EVENT?

If the event is profitable, consider using the money on the following options:

- Use toward future alumni engagement events.
- Donate money to the chapter's Chapter Leadership Fund.
- Make a donation to your chapter's chosen service initiative.

Appendix

Venue Selection

Prior to selecting the venue(s), the committee should create a list of “must haves” to help determine which venues would work best for the event. While visiting the different venues, take pictures of each to help the committee remember details.

The chart below will allow for a side-by-side comparison and offers things to consider when selecting the venue(s):

Venue Name	Capacity	Catering Options?	Equipment Included? Tables, chairs, linens, etc.	Distance from Airport/Hotel/Campus	Budget Amount	Actual Cost Including any additional fees	Deposit Amount/ Due Date

Vendor Selection Chart

Venues often have a list of preferred vendors, which can be helpful in choosing a vendor who has a good reputation and is familiar with the venue.

Things to consider when choosing the entertainment or other specialty vendor such as cake, photographer or videographer:

- ★ Are they familiar with any rules for your venue, and are they willing to stick to them?
- ★ What is the timeline of services on the day of the event, including set-up and tear down?
- ★ For entertainment vendors:
 - Will their entertainment style suit the tastes of a potentially large generation gap? If music is included, will they allow the chapter to review the playlist prior to the event?
 - Will musical entertainment take requests and do they play “radio” appropriate music?
 - Does the company have multiple entertainers to choose from?

The chart below will allow for a side-by-side comparison and offers things to consider when selecting vendor(s):

Vendor Type	Provision for Placement?	Equipment Included? Tables, chairs, linens, etc.	List of items needed to be supplied by committee	Budget Amount	Actual Cost Including any additional fees	Deposit Amount/ Due Date

Hotel Selection

Hotel information should be decided soon after the date for the event is confirmed, ideally six to eight months prior, and well before invitations are scheduled to be mailed to guests.

The chart below will allow for a side-by-side comparison and offers things to consider when selecting a hotel:

Hotel Name	Room Price/ Discount	Date Range for Group Rate	Distance from Airport/Hotel/ Campus	Shuttle Available?	Blocks Available	Contract Required	Fee for Unreserved Rooms	Reservation Deadline

Some other things to consider when reserving hotel room blocks are:

1. Are you required to fill all the reserved rooms to get the discounted rate?
2. Is the chapter liable for guests staying in the room block?
3. What happens if someone cancels a reservation in the block?
4. Can additional blocks be added later, if necessary?