



## Advancement Events

Responsible Official: Vice President for University  
Advancement

Responsible Office: University Advancement

### Policy Purpose

This policy serves to assign responsibility and provide guidelines when planning events related to the University Advancement Office.

### Policy Statement

ETSU Interim Alcohol Policy, 8/7/2017

### Definitions

N/A

### History

Effective Date: 02/07/2018

Revision Date:

### Procedure (s)

#### Attachments:

Sample Events Checklist

#### I. Responsibilities.

- A. Under the direction of the Vice President for Advancement, the University Advancement Office is responsible for:
  1. Developing and implementing appropriate university-wide opportunities for donors and potential donors to meet with university leaders, faculty, staff, and/or students. Events should serve to increase attendees' passion and engagement with ETSU and to strengthen connections between gifts and impact.
  2. Identifying resources to plan and conduct university-wide events.
  3. University Advancement (or unit fundraisers) does not typically plan, manage, conduct, or fund events such as walks for cancer, GoFundMe pages for medical bills, etc. These are usually personal projects best handled by individual(s).
- B. ETSU units have the same responsibilities for donor-centered events held at the unit-level.
- C. National Alumni Association is responsible for events to engage alumni among themselves or with the university.

## II. All Donor-centered Events:

- A. Prepare an event plan using the Attachment as a guide.
- B. Advancement staff should be involved in planning and execution of events, but should not ordinarily be assigned to conduct or manage events.
- C. Before beginning to plan an event, consider and communicate the following:
  - 1. What is the purpose/goal of the event (stewardship, dedication, ground breaking, fundraising, awareness, engagement, etc.)?
  - 2. What is the budget for the event?
  - 3. Whose budget(s) will cover event costs?
- D. Always request/track RSVPs. At a minimum, include names and E-numbers. At the completion of the event, forward the list (showing those who did/did not attend) to Advancement Services to enter into Banner Advancement.
- E. Depending on the number/type of guests attending, request ETSU Office of Safety support, especially if the outside community is invited. Safety will determine whether police support is needed.
- F. If some portion of the event will take place outdoors, ensure there is a rain plan.
- G. Always provide a registration/information table and provide nametags. Consider including name, class year, and college/program on nametags.
- H. Assign a host/master of ceremonies to conduct the event.
- I. Welcome, introduce, and thank attendees and special guests:
  - 1. Always welcome attendees and thank them for coming.
  - 2. Guests who receive a by-name welcome/intro during an event should be of sufficient level and/or so integral to the success of the event, to warrant being named.
  - 3. Consider other guests of equal or higher level, who may also have to be welcomed or introduced. For example, if you introduce one dean, you should introduce all, etc.
- J. After-action. Organizer should consider the following after the event:
  - 1. Lessons learned and feedback.
  - 2. Changes for future events.
  - 3. Follow-up needed for attendees (pictures, notes, answers to questions, etc.).
  - 4. Who should receive and who should prepare thank you notes.
  - 5. Payment of invoices connected to the event.
- K. Groundbreakings, Dedications, Openings, and similar events:
  - 1. Organizers should determine early on, who will ceremoniously break ground, cut the ribbon, unveil the plaque, etc. These people should include at least one person from senior ETSU leadership, significant donors to the project and/or people the project is named for, and a community leader if appropriate. Organizers should strive to keep this number small and anyone involved should have been integral to the project.
  - 2. People who played noteworthy roles in the project could be mentioned during remarks.

## III. Advancement-level (university-wide) Events. The following examples of events are typically funded, planned, and managed by/through University Advancement, often involving University Relations.

- A. Distinguished President's Trust (DPT) Awards Banquet.
  - 1. Cocktail Reception for new DPT members
  - 2. Cocktail Reception for Legacy Circle members

- B. President’s Circle Events:
  1. Tailgates
  2. Academy
  3. Luncheon(s)
- C. Planned Giving Events:
  1. Annual Legacy Circle Luncheon
  2. Savvy Living Seminars
  3. Planned Giving Receptions (jointly-hosted with colleges/units)
- D. Giving Day/Week

IV. **Unit-level Events.** The following examples of events are typically funded, planned, and managed by/through the unit:

- A. Scholarship Events (lunches, banquets, award ceremonies, etc.).
- B. Halls of Fame inductions.
- C. White Coat Ceremonies.

V. **Alumni Association Events.** The following examples of events are typically funded, planned, and managed by the National Alumni Association:

- A. Alumni Golf Classic.
- B. Athletics (football, homecoming, basketball, baseball, soccer pre-game, etc.)
- C. Alumni Board.
- D. Affinity Reunions and Golden 50s Club Spring Weekend.
- E. Alumni Club.
- F. Graduation Celebrations (Spring and Fall).
- G. Alumni Recognition Programs.
- H. Class Ring Ceremonies (Spring and Fall).
- I. Student Recruitment Events (Top Scholar, Summer Orientation, etc.).
- J. Summer Send-off.
- K. Student Alumni Association.
- L. International Student/Alumni.
- M. ETSU PRIDE Regional.

Related Form(s)

N/A

Scope and Applicability

	Governance	
	Academic	
	Students	
	Information Technology	
	Health and Safety	
	Business and Finance	
	Operations and Facilities	
	Communications & Marketing	
X	Advancement	

## **Attachment – Sample Event Checklist and Planning Timeline**

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### **Checklist:**

- Marketing plan. How will the event be publicized? Who will be invited/reminded? Who will prepare/send invitations?
- Take RSVPs and ensure you collect E-numbers.
- Rain plan, if any part of the event will take place outdoors.
- If the event takes place in fall/winter, make sure you can provide for coat/boots/umbrellas.
- Safety/Police support, if applicable.
- Determine who will host and who will cover costs. Keep them involved in planning and management.
- If alcohol will be served, refer to the ETSU policy.
- When planning the menu, consider dietary restrictions and allergies.
- Facility Usage Permission. Each building on campus has a building coordinator. Make sure you consult this person to reserve the space. For events in academic spaces, you can work through the Office of the Registrar. For events taking place outdoors (quad, breezeway, Borchuck Plaza, etc.), contact Facilities Management for approval to use the space.
- Consider assigning seats, to maximize opportunities to connect leadership with attendees. If you assign seats, will you use placecards and/or a seating chart?
- Will you have entertainment? If so, who will provide for lighting, sound, A/V, etc.?
- Will the venue be decorated? If so, who will do this?
- Consider having a student presence? Perhaps use student Ambassadors, President's Pride, student workers, etc.
- Is the venue handicap accessible?

### **Planning Timeline:**

- About 7 weeks before event:
  1. Confirm/prepare invitations
  2. Consider gifts needed (guests/speakers)
  3. Confirm/prepare guest list
- About 6 weeks before event:
  1. Send invitations
  2. Order tents, porta-potty, etc.
  3. Reserve photography/video, as appropriate
  4. Reserve entertainment
- About 2 weeks before event:
  1. Send RSVP list to AVP/VP for Advancement
  2. Confirm menu/catering
- About 1 week before event:
  1. Update RSVP list for AVP/VP for Advancement
  2. Confirm vendors/event providers
  3. Set times for set-up and tear-down
  4. Draft event agenda/timeline
  5. Confirm details with ETSU leadership (if appropriate)

- About 2 days before event:
  1. Complete nametags (prepare extras)
  2. Bring extra pens/markers
  3. Prepare/wrap gifts
  4. Send final RSVP list to AVP/VP for Advancement
- Day after event:
  1. Prepare attendance list
  2. Prepare lessons learned
  3. Retrieve/save photos
- 2 days after event:
  1. Prepare/send thank you notes:
    - Guests
    - Providers