

EVENT PLANNING GUIDE FOR VOLUNTEERS

Follow this guide for an overview of how to deliver successful volunteer-led events.

CONTENTS

IN-PERSON EVENTS

1. [Checklist](#)
2. [Event timeline and key steps](#)
3. [Other helpful resources](#)

VIRTUAL EVENTS

1. [Checklist](#)
2. [Event timeline and key steps](#)
3. [Virtual venue options](#)
4. [Other helpful resources](#)

IN-PERSON EVENTS

CHECKLIST

These are the key focus areas to work through while planning your event. These focus areas are explained in the [Planning Timeline](#) in a format that will help you track and complete all of the critical steps under each focus area to plan your event.

- FOCUS 1: Have initial discussions and consider important event questions.
- FOCUS 2: Planning to move ahead with the event in a timely manner.
- FOCUS 3: Pull together discussions and submit the Event Request Form.
- FOCUS 4: Event promotions.
- FOCUS 5: Event implementation.
- FOCUS 6: Deliver the event.
- FOCUS 7: Post-event debrief.

EVENT TIMELINE AND KEY STEPS

Please refer to the [Planning Timeline](#) for a downloadable event timeline / task tracker.

OTHER HELPFUL RESOURCES

Event Planning Resources	<ul style="list-style-type: none">• Planning tools• 5 Things to Consider Right Now as You Plan for Fall Events (donorrelationsguru.com)• The Answers to Your Burning Questions as We Return to In-Person Events - Eventbrite US Blog
Event Ideas	<ul style="list-style-type: none">• Subject Expert Speaker with Q & A

	<ul style="list-style-type: none"> • Social gatherings with a fun activity or in key local areas/trending spots • Sporting events with a Waterloo section • Career Panels • Student - Alumni events
Waterloo Events	<ul style="list-style-type: none"> • Waterloo alumni past events page • Waterloo past and upcoming events

VIRTUAL EVENTS

CHECKLIST

These are the key focus areas to work through while planning your event. These focus areas are explained in the [Planning Timeline](#) in a format that will help you track and complete all of the critical steps under each focus area to plan your event.

- FOCUS 1: Have initial discussions and consider important event questions.
- FOCUS 2: Planning to move ahead with the event in a timely manner.
- FOCUS 3: Pull together discussions and submit the Event Request Form.
- FOCUS 4: Event promotions.
- FOCUS 5: Event implementation.
- FOCUS 6: Deliver the event.
- FOCUS 7: Post-event debrief.

EVENT TIMELINE AND KEY STEPS

Please refer to the [Planning Timeline](#) for a downloadable event timeline / task tracker.

VIRTUAL VENUE OPTIONS

Here are some options for virtual platforms that Alumni Relations can support for your event.

Ask yourself the following questions as you select your virtual event platform:

- What is your budget?
- What technology features does your event require?
- What interaction level should attendees have (chat messaging, voice, video)?
- Will screen sharing be required?
 - If you plan to show a video, make sure that the technology is working as expected during your technology test meeting
- What technology / troubleshooting support do you anticipate your team will need?
- Will your event have pre-recorded elements?

Platform	Details
Hopin	<p>Hopin is Waterloo’s platform for special events that includes a main event stage with chat and Q & A function, breakout sessions, and 1-1 networking with video. Hopin is a good platform for large, formal events.</p> <ul style="list-style-type: none"> • Past Hopin Event Recording (of the main event stage): Building Bridges: from Waterloo to the globe • If you would like to use Hopin for your event, please discuss with the Alumni Relations Volunteer Engagement team!
Zoom	<p>Zoom is a flexible platform that users are familiar with globally. Attendees will likely be familiar with this platform and require minimal technical support. Compared to Hopin, Zoom is less formal and more interactive.</p> <p>The Alumni Relations team has a Zoom account that volunteers are welcome to use. Please contact the team if you are interested!</p>
Microsoft Teams	<p>Microsoft Teams is a common event platform that works well for various sizes of audiences. Breakout rooms can be created for smaller group discussions.</p> <p>For larger-scale events, connect with the Alumni Relations Volunteer Engagement Team. Technical and production support can be arranged for an “MS Teams Live Event” with a moderated Q+A.</p>

OTHER HELPFUL RESOURCES

Event Planning Resources	<ul style="list-style-type: none"> • Guidelines for hosting accessible virtual events • Planning tools
Event Ideas	<ul style="list-style-type: none"> • Waterloo alumni online learning page • 33 Fun Virtual Event Ideas for Online Socials in 2021 (teambuilding.com)
Waterloo Events	<ul style="list-style-type: none"> • Waterloo alumni past events page • Waterloo past and upcoming events