



Organizing an Alumnae Conference or Symposium

MOUNT **H**OLYOKE
never fear / change

MHC
ALUMNAE ASSOCIATION
MOUNT HOLYOKE COLLEGE

Table of Contents

Overview	1
Planning Guide	4
Planning Timeline	6
Marketing and Communications Guide	7
Sample Budget Considerations	9
Commitment	10

Volunteer Handbook

Organizing an Alumnae Conference or Symposium

Overview

The Alumnae Association of Mount Holyoke College may choose to support domestic and international conferences and symposia in order to connect Mount Holyoke alumnae to one another and the College. Typically, these events are organized in partnership with an Alumnae Organizing Committee (AOC) and other departments on campus.

This handbook has been compiled to assist leaders of AOCs in their work on behalf of the Alumnae Association and outlines the steps they must follow to become officially recognized and supported by the Alumnae Association and the College.

Any alumnae group wishing to receive logistical and financial support of an event from the Alumnae Association and College must submit an application for approval. This application is reviewed by a committee comprised of the executive director of the Alumnae Association, the vice president of the Office of Advancement, the vice president of the Office of Admission, and the Office of the President. The conference and symposium request form can be found [here](#).

Definition of Alumnae Organizing Committees

Alumnae Organizing Committees (AOCs) are groups of alumnae and/or students coming together for the express intent of organizing an event—domestic or international—specifically catered to alumnae and/or student audiences.

AOCs are established with the intent to work in partnership with the Alumnae Association and the College around an event that involves the support of Alumnae Association staff and resources.

Principles of Alumnae Organizing Committees

The Alumnae Association, in support of the goals of its Strategic Plan 2020, has developed the following principles by which AOCs must abide:

- AOCs will encourage and enable our global alumnae
- AOCs will encourage and enable alumnae who have a unique global perspective or focus area
- AOCs will encourage relationships and interdependence between alumnae and students
- AOCs will encourage relationships and interdependence between alumnae and faculty/administration

Commitment to Diversity, Equity, and Inclusion

The Alumnae Association's membership includes approximately 37,000 graduates of the College who are diverse in every measure—age, race and ethnicity, profession, religion, lifestyle, and political opinion.

The Alumnae Association is committed to fostering a climate of inclusivity, which requires us to develop and promote activities and programs that further our understanding of individual and group diversity regardless of race, ethnicity, religious belief, sexual orientation, sex/gender, disability, socioeconomic status, cultural orientation, national origin, and age.

When planning events for the Mount Holyoke community, it is critical that everyone feels welcome and included.

AOC Roles and Responsibilities

Each AOC should be comprised of the following roles:

Chair

The chair presides at all meetings, has usual powers of leadership and management as it may pertain to the committee, and is required to update the Alumnae Association project manager at least monthly. The chair must coordinate with all committee members and produce deliverables as agreed upon.

Secretary

In coordination with the chair, the secretary is responsible for recording and publishing meeting minutes and maintaining each meeting attendee list. The secretary is also the direct liaison to Alumnae Information Services, responsible for requesting any needed reports of alumnae.

Budget Coordinator

The budget coordinator provides budget proposals for approval to the committee and helps manage all expenditures in collaboration with the Alumnae Association and the AOC chair.

Communications Liaison

One point person on the AOC must serve as a communications liaison and assist with the following:

Development and promotion of a hashtag

Promotion of event through targeted social media channels (closed Facebook groups, etc.)

Coverage on the day of the event on social media

Photography of the event for archival purposes

Alumnae Association Role: Project Manager

The Alumnae Association considers requests for staff and financial support based on the priorities of its strategic plan and budgeted resources. Decisions are made in partnership with the College. Once approved, the Alumnae Association will designate one staff person to support the event as the project manager. This person will:

- Work directly and in partnership with the chair of the committee via regularly scheduled meeting times
- Attend all of the planning meetings
- Provide all tools for meeting facilitation, planning materials, budget discussions, etc.
- Serve as liaison for all on-campus coordination
- Lead the effort in complying with all internal checklists for on- and off-campus events
- Provide the registration form and manage all registrations
- Attend the event

The Alumnae Association (in collaboration with the College) reserves the right to:

- Redirect the committee if the direction no longer represents the efforts as outlined in the approved application
- Prioritize the financial resources provided by the College and Alumnae Association, as appropriate

Financial Support

Financial support will be based on the priorities of the Alumnae Association's strategic plan and budgeted resources. Decisions will be made in partnership with the College. Once approved, financial support of an event can be comprised of:

- Support by the Alumnae Association and the College
- Attendee charges
- In kind support of the Alumnae Association and the College

Final approval is at the discretion of the Alumnae Association executive director and the project manager.

Prohibited Activities

The Alumnae Association is a registered organization with a tax-exempt status in the United States. This means that the spokesperson and public officials participating in Alumnae Association events may not endorse or may not in any way advocate the election or defeat of any candidate or political party. A violation of the political activity prohibition can result in a revocation of the Alumnae Association's tax-exempt status. You can read more [here](#).

Planning Guide

Every event begins with a vision and clear, measurable objectives, which help define the audience, structure, and delivery of the program.

To help think through this process, consider why, where, who, when, and what.

Why: All planning should flow from the answer to “why are we holding this event?”

What is the purpose for the event, and what can an attendee expect to get out of it? Below are a few objectives to consider:

- Build relationships and grow the base of connected alumnae living and working in the region
- Increase Mount Holyoke's visibility in the region
- Build awareness of the Alumnae Association and clarity about its work
- Forge a powerful partnership with the College
- Establish structures and mechanisms to facilitate ongoing alumnae engagement
- Conduct training and capacity building for alumnae volunteers in the region
- Invoke a sense of pride in attendees for their alma mater
- Offer an opportunity for networking

Where: How do we decide where the event will take place?

Events may be held on campus, regionally, or internationally. Here are some criteria to consider, particularly for international events:

- Potential for long-term alumnae engagement and connection
- Existence of a strong group of alumnae volunteers with local contacts to assist in reserving speakers and venues
- Existence of a large number of local alumnae who would likely attend the event
- Easy travel access for those coming from outside the country
- Interesting location where alumnae can take in sites before and/or after the event
- Efficient, easy-to-use transportation systems within the city
- A country that does not have a complicated visa process—and possibly allows short visits without visas

Who: Who will be part of the planning team?

The planning team for conferences and symposia should consist of the AOC (see page 2), as well as the Alumnae Association staff member who is acting as the project manager for the event.

Enlisting members of the AOC should be a thoughtful process, and those who join should have a clear understanding of the long-term commitment and responsibilities involved.

- A team of three to four on the AOC will work best
- The club leader in the area would likely be on the AOC, if applicable

Who: Who is the target audience?

Decide ahead of time who among the following will be your primary and secondary audiences:

- Alumnae in/from the region/continent
- Young alumnae in/from the region
- All alumnae
- Students or prospective students
- Parents

When: When do we want to hold the event?

AOCs must take into account the following:

- Local/regional/worldwide holidays
- Peak travel times
- Weather
- What else is taking place on campus/locally/regionally, etc.

The AOC must propose several weekend date options. The Alumnae Association project manager will coordinate efforts with the College to solidify dates.

What: What is the plan?

The key to planning a successful event is to lock down the purpose, target audience, theme, format/structure, venue, date, and budget. These must not vary without significant thought and discussion as event preparations are under way.

The plan should address the following questions:

- What is the theme?
- What is the budget?
- What sources of funding are available?
- What will the structure/format of the program look like?
- What are the expectations of members of the planning team?
- What are the roles and responsibilities of members of the planning team?
- What are the risks involved?
- What are the measures of success?

Important notes:

- The president of the College must have a prominent place in the program
- The president of the Alumnae Association, if attending, must also be invited to speak where appropriate in the program
- The organizers should try to enlist as many alumnae as possible as speakers
- For events that are not on campus, the program should include or highlight information, strengths, history, unique aspects of the city/country/region

Planning Timeline

Milestone	Timing
Application submitted	18–24 months prior to proposed event date(s)
AOC roles assigned	18 months prior to proposed dates
Theme decided	18 months prior to proposed dates
Objectives agreed upon	18 months prior to proposed dates
Location and date confirmed	12–18 months prior to proposed dates
Budget created and confirmed	12 months prior to proposed dates
Messaging and marketing timeline decided	Refer to communications timeline
Speakers enlisted and confirmed	9–12 months prior to proposed event date

Marketing and Communications Guide

Messaging and Branding

The Alumnae Association and the Mount Holyoke Office of Communications will work with the AOC communication liaison to develop the key messages needed to support the promotion of the event. The Alumnae Association and Office of Communications will also manage and produce print materials, such as programs, invitations, signage, etc., dependent upon budget, and will oversee the production of all emails and web pages.

Marketing Milestones and Event Promotion

The Alumnae Association, in partnership with the College, systematically markets events across its communication channels in an effort to reach as many alumnae in the target audience as possible.

The following is our standard event promotion timeline:

Save the Date (6–9 months prior): Once the AOC identifies the target audience, we will send an email save the date with a link to a preliminary program on the Alumnae Association website so people know where to go as details develop. We will also include a save the date in the Laurel Chain monthly newsletter, sent to all alumnae, and in Alumnae Association and College social channels thereafter. We will include a save the date in the *Alumnae Quarterly* magazine, if the timing coordinates.

Website Landing Pages (4 months prior): The Alumnae Association will create special pages on its website to house information about the event. The AOC and the Alumnae Association project manager must deliver the content to the marketing team as it becomes available. Content includes the event program, speaker bios, travel and accommodation details, and any other pertinent information. The Alumnae Association marketing team will edit and present the content according to best practices.

Call to Register (3 months prior): The Alumnae Association will send an electronic invitation to register for the event. The email will include a link to the event landing page housed on the Alumnae Association website. The Association will follow up with promotion in the Laurel Chain newsletter and all social channels. A call to register will be included in the *Alumnae Quarterly* magazine, if the timing coordinates.

Print Materials (2 months prior): Any print materials that have been budgeted (invitation, program, signage, etc.) should be coordinated with the Alumnae Association project manager well in advance to allow plenty of time for production and shipping.

Registration Reminder (1–2 months prior): If more registrations are desired, the Alumnae Association will send an email registration reminder, emphasizing the registration deadline.

Event Reminder (1 week prior): The Alumnae Association will send an email that serves as a reminder of the event and includes pertinent details for attendees such as parking, transportation, where to check in, what to bring, etc.

Post-Event Survey (1–2 days after event): In order to measure the success of the event and pinpoint areas of improvement, the Alumnae Association will send an email with a link to an online survey after the event. The survey includes standardized questions to measure success. The AOC should work with the Alumnae Association project manager to tailor or add questions specific to the event and its objectives.

Day of the Event

Photography: The Alumnae Association can assist in hiring a professional photographer for a half-day photoshoot in order to obtain high-quality images for post-event coverage across channels. The organizers should appoint a volunteer to photograph the full event if they need further coverage for archival purposes.

Social Media Coverage: We recommend that all collateral and signage contain the agreed upon hashtag and that the AOC communications liaison post to social media throughout the day using the hashtag.

Post-Event Coverage

The Alumnae Association and College will publicize photos and a recap of the event across communications channels, including the *Alumnae Quarterly*.

Sample Budget Considerations

Revenue					
Registration	Price	Split	Count	Subtotal	Balance
Alumnae >10 years	=Cost of meals+venue+general / # of participants at this level + 3.5% credit card fees	70%	70		
Recent alumnae <10 years	=Cost of meals+venue+general / # of participants at this level + 3.5% credit card fees	10%	10		
Students	=Cost of meals+venue+general / # of participants at this level + 3.5% credit card fees	10%	10		
Guests/Faculty/Staff	=Cost of meals+venue+general / # of participants at this level + 3.5% credit card fees	10%	10		
À la carte options	Direct pricing as stated by vendor				
Expenses					
		Price	Count	Subtotal	Balance
Meals					
	Friday dinner				
	Saturday breakfast				
	Saturday lunch				
	Saturday dinner				
	Coffee breaks				
General					
	Venue rental and room set up				
	Credit card fees				
	Participant materials/gift: tote bags, notepads, pens				
	Photographer				
	Speaker gift				
	Speaker registration costs				
	Special guests/VIPs registration costs				
	Panelists: registration, meals				
	Day of marketing materials: signage, banners, table cloths, etc.				
	Decorations: center pieces, florals, room décor, etc.				
	Audio/Video				

Commitment

By signing below, I acknowledge that:

- This Alumnae Organizing Committee will comply with all guidelines provided in this handbook; and
- All information provided herein is true, accurate, and reflects committees' mission, goals, and objectives.

Chair Signature

Chair Name

Cochair/Secretary Signature

Cochair/Secretary Name

Budget Coordinator Signature

Budget Coordinator Name