The Chapter Event Planning Guide

A Fulbright Association Chapter Leader Toolkit Resource

How to Use This Guide

This guide walks you through every stage of planning a chapter event, in the order you'll actually encounter them – from the first spark of an idea to the follow-up email you send afterward. It's built to be used in pieces: pull up the section that matches where you are in the process, work through the checklist, and move on.

You don't need to plan a large event to get value here. A 15-person alumni coffee hour and a 150-person embassy reception follow the same core steps – this guide simply scales with you. Where a step matters more for larger events, we'll flag it.

Every major section ends with the same checklist heading:

BEFORE MOVING ON, MAKE SURE YOU HAVE…

Treat that line as a gate. If you can't check every box, you're not ready for the next section – and that's the whole point. Most event problems trace back to a step that got skipped, not a step that got done poorly.

Planning Timeline: The Big Picture

Before diving into any single task, look at the whole arc. Below is a standard 8-week timeline for a mid-sized chapter event (a panel discussion, alumni networking event, or cultural celebration). Scale it up to 12-16 weeks for events involving an embassy or university partner – those relationships require longer lead times for approvals and calendar coordination. Scale it down to 3-4 weeks for a simple, low-stakes gathering like an informal returning scholar meetup.

Weeks Out	Focus
8	Define goal, audience, and budget. Draft a one-page concept.
7	Confirm venue. Begin speaker outreach.
6	Confirm speakers. Set up registration.
5	Recruit and assign volunteers. Launch promotion.
4	Continue promotion. Confirm accessibility accommodations.
3	Send save-the-date reminder. Finalize run-of-show.
2	Confirm all logistics (AV, catering, signage). Reminder email #1.
1	Final walkthroughs. Reminder email #2 (day before).
0	Event day.
+1	Thank-you and follow-up communications.
+2	Evaluation and debrief.

Why start with a timeline instead of a task list? Chapter leaders who work backward from the event date consistently report smoother events than those who work forward from "what do we need to do first." A calendar view surfaces bottlenecks – like a venue that requires 60 days' notice – before they become emergencies.

Pro Tip: Build your timeline in whatever calendar tool your planning team already uses (shared Google Calendar, group text with dates, spreadsheet). The tool matters less than the habit of checking it weekly.

BEFORE MOVING ON, MAKE SURE YOU HAVE…

A target event date (or a short list of 2-3 candidate dates)

A timeline mapped backward from that date

A shared place your planning team can see the timeline

Section 1: Goal Setting

Every successful event starts with a clear answer to one question: **what is this event supposed to accomplish?** Not "what will we do," but "what will be different afterward."

Vague goals like "build community" or "raise our profile" are common starting points, but they don't help you make decisions later – about venue, speakers, or even whether the event is worth the effort. A specific goal does.

Weak goal: "Host an event for alumni."

Strong goal: "Reconnect 25+ lapsed alumni with the chapter and identify 3-5 who are willing to volunteer for next year's programming."

The strong version tells you who to invite, what success looks like, and what to measure afterward.

Common Event Goals for Fulbright Chapters

Goal Type	Example Event	What Success Looks Like
Community building	Alumni networking mixer	Attendance, repeat attendees, new connections made
Education / awareness	Panel discussion on a Fulbright-related theme	Attendance, audience engagement (Q&A volume), post-event survey scores
Institutional partnership	University or embassy co-hosted event	Partner satisfaction, potential for repeat collaboration
Recruitment / pipeline	Pre-departure send-off for outbound grantees	Grantee attendance rate, follow-up mentorship sign-ups
Recognition	Returning scholar panel	Scholar participation, media or newsletter coverage

Advocacy	Advocacy event tied to Fulbright Program funding	Number of constituent contacts made, participant follow-through
Cultural exchange	Cultural celebration or film screening	Attendance, diversity of attendees, partner engagement
Civic contribution	Service project	Volunteer hours, community partner feedback

Best Practice: Write your goal down in one sentence and share it with your planning committee before you discuss any logistics. Logistics conversations move faster once everyone agrees on why the event exists.

Common Mistake: Choosing the event format first ("let's do a panel") and backfilling a goal afterward. This produces events that look fine but don't clearly succeed or fail at anything – which makes it hard to justify chapter resources for a repeat next year.

BEFORE MOVING ON, MAKE SURE YOU HAVE…

A one-sentence goal statement

Agreement from your planning committee (or board) on that goal

At least one measurable indicator of success tied to the goal

Section 2: Audience Identification

Your goal tells you *why* you're hosting an event. Your audience tells you *who* needs to show up for that goal to be met.

Chapter leaders sometimes default to "everyone on our email list," but a clearly defined audience changes almost every decision that follows – venue size, time of day, format, promotion channels, even food and beverage choices.

Questions to Answer

1. Who specifically needs to be in the room for this event to succeed? (Current members? Lapsed alumni? Prospective grantees? Local university students? Embassy staff?)
2. What size crowd matches your goal – and your venue and budget?
3. What day and time works best for that audience? A university partnership event scheduled during finals week, for instance, will underperform regardless of how well everything else is planned.
4. Are there accessibility, language, or cultural considerations specific to this audience?

Audience Snapshot Table

Fill this in during your first planning meeting:

Audience Segment	Estimated Size	Why They Matter	Best Outreach Channel

Why this matters: A panel discussion aimed at prospective applicants draws a very different crowd – and requires very different promotion – than the same panel aimed at returning scholars. Defining the audience before you touch a venue or promotion plan prevents costly format mismatches.

Quick Tip: If you're unsure who your real audience is, look at who attended your chapter's last few events. Past attendance is often the best predictor of who will show up next.

Before moving on, make sure you have…

A defined primary audience (and secondary audience, if relevant)

An estimated headcount range

A sense of the best day/time for that audience

Any known accessibility or language needs for this group

Section 3: Budgeting

Budgeting early – before you fall in love with a venue or speaker idea – keeps your options grounded in what's actually achievable. Chapters that budget last often end up cutting corners on accessibility, food, or promotion, since those are the line items people forget until it's too late.

Typical Line Items

Category	Notes
Venue rental	Includes deposits, cleaning fees, security if required
Catering / refreshments	Budget per-person; don't forget dietary accommodation costs
AV / technical equipment	Microphones, projector, livestream setup
Printing / signage	Name tags, agendas, directional signage
Speaker costs	Travel, honoraria (if any), thank-you gifts
Accessibility accommodations	ASL interpretation, captioning, materials in alternate formats
Promotion	Paid social boosts, printed flyers, postage
Contingency	10-15% of total budget, held in reserve

Why include a contingency line? Something unplanned comes up in nearly every event – a last-minute AV rental, an extra round of printing, a catering minimum you didn't anticipate. A contingency line means a surprise cost doesn't force a mid-planning scramble for approval.

Where Budget Meets Reality

If your ideal event costs more than your available budget, work through these options in order before cutting your guest list or accessibility accommodations:

1. Look for a co-host (university, embassy, or community partner) to split costs.
2. Ask a local business or restaurant to sponsor food or space in exchange for recognition.
3. Reduce speaker travel costs by prioritizing local or virtual speakers.
4. Scale back printed materials in favor of digital alternatives.

Common Mistake: Cutting the accessibility line item when a budget gets tight. This should be one of the last things cut, not the first – see Section 9 for why.

BEFORE MOVING ON, MAKE SURE YOU HAVE…

A full budget draft covering every category above

Confirmed funding source(s) – chapter funds, sponsorship, partner contribution

A contingency line of 10-15%

Sign-off from whoever approves chapter spending

Section 4: Venue Selection

With a goal, audience, and budget in hand, you're ready to choose where the event happens. Venue is one of the harder steps to reverse late in planning, so lock it in early – ideally 6-8 weeks out, or earlier for embassy or university venues that require formal booking processes.

Venue Checklist

- Capacity matches (not exceeds, not undershoots) your expected headcount
- Accessible entrance, restrooms, and seating (see Section 9 for full accessibility standards)
- Available on your target date and time, including setup/teardown windows
- AV capabilities match your program (microphone, projector, livestream bandwidth)
- Parking or public transit access appropriate for your audience
- Cost fits your budget, including any hidden fees (security deposit, overtime, cleaning)
- Alcohol policy (if relevant) is clear and compatible with your event
- Cancellation and rescheduling policy is documented in writing

Matching Venue to Event Type

Event Type	Venue Considerations
Panel discussion	Auditorium or classroom-style seating with working AV
Fulbright Welcome Reception	Reception-style venue with mingling space, not fixed seating
Alumni networking	Casual venue (restaurant back room, café, community space)
Cultural celebration	Space that accommodates performance, food service, and larger capacity
Embassy partnership event	Often hosted at the embassy or consulate itself – confirm security/registration requirements well in advance
University partnership event	Campus venues often require an internal sponsor or department co-sign
Service project	Consider the project site itself as the "venue" – confirm liability coverage

Best Practice: Get every venue agreement in writing, even for informal or free spaces. A verbal agreement with a restaurant manager who leaves before your event date can undo weeks of planning.

Before moving on, make sure you have…

A signed or confirmed venue agreement

Confirmed accessibility features at the venue

Confirmed AV capabilities

A backup plan if the venue falls through (especially for outdoor or single-vendor spaces)

Section 5: Speakers and Programming

Speakers and programming shape the experience your audience actually has. This is also the step most likely to run long, since good speakers are often busy people juggling their own calendars – start outreach as soon as your venue and date are locked.

Identifying the Right Speakers

Ask: who can speak with authority and authenticity to your event's goal? For a returning scholar panel, that's returning scholars themselves – not just chapter leadership narrating on their behalf. For an advocacy event, that might include a former grantee, a local elected official's staff, or a policy expert.

Speaker Outreach Checklist

- Identify 2-3x more candidate speakers than you need (expect declines)

- Send outreach with clear details: date, time, format, expected time commitment, audience size, and what's expected of them (prepared remarks vs. conversational panel)
- Confirm honorarium or travel reimbursement policy, if any, before the ask – not after
- Get written confirmation once a speaker agrees
- Collect a short bio and headshot for promotional materials
- Schedule a brief prep call 1-2 weeks before the event to align on format and questions
- Confirm AV/technical needs specific to each speaker (slides, remote video-in, etc.)

Why a prep call matters: Speakers who haven't spoken for your chapter before often don't know your audience's background or what "success" looks like for your event. A 15-minute call prevents a panelist from re-explaining basic program facts to an audience of people who already know them – or, conversely, using jargon on the assumption everyone already knows the context.

Building a Run-of-Show

A run-of-show is a minute-by-minute script of the event. Every event, regardless of size, should have one. It should include:

Time	Activity	Owner
6:00 PM	Doors open / registration	Volunteer A
6:30 PM	Welcome remarks	Chapter chair
6:35 PM	Panel discussion	Moderator
7:15 PM	Audience Q&A	Moderator
7:30 PM	Closing remarks / networking	Chapter chair
8:00 PM	Event ends	–

Common Mistake: Assuming speakers will naturally stay on time. Assign a specific person – often a volunteer, not the moderator – to hold up time cards or send a subtle signal at 5- and 1-minute marks.

Before moving on, make sure you have...

Confirmed speakers in writing

Bios, headshots, and AV needs collected

A completed run-of-show with named owners for each segment

A scheduled prep call with speakers

Section 6: Registration

Registration does double duty: it gives you a headcount for catering and space planning, and it's your first real touchpoint with attendees before the event itself.

Setting Up Registration

- Choose a platform appropriate to your event size (a simple form or spreadsheet works for under 30 people; a dedicated tool like Eventbrite or a similar platform is worth it above that)
- Include only the fields you actually need – name, email, and any accessibility or dietary accommodation requests. Long forms suppress sign-ups.
- Set a registration deadline that gives you enough lead time for final catering and print counts (typically 3-5 days before the event)
- Build in a way to capture accessibility/accommodation requests at registration, not as an afterthought
- Set up an automatic confirmation email with date, time, location, and parking/transit info

Why ask about accommodations at registration instead of at the door? Requests like ASL interpretation or dietary needs often require lead time to fulfill. Asking during registration – rather than assuming someone will mention it on arrival – is what makes accommodation possible rather than reactive.

Quick Tip: Track registration numbers against your timeline weekly. If sign-ups are lagging two weeks out, that's your signal to boost promotion – not a reason to panic, but a reason to act.

BEFORE MOVING ON, MAKE SURE YOU HAVE...

A live registration form or system

A registration deadline set and communicated

A field capturing accessibility/dietary needs

An automatic confirmation email in place

Section 7: Promotion

Even a perfectly planned event fails if the right people don't know about it. Promotion should start as soon as your date, venue, and registration link are locked – typically 4-5 weeks out – and continue in waves through the event date.

Promotion Channels to Consider

Channel	Best For
Chapter email newsletter	Reaching existing members and past attendees
Chapter or Fulbright Association social media	Broader awareness, shareable content
Partner organization channels (university, embassy)	Reaching new audiences outside your existing list

Personal outreach / direct asks	Highest-conversion channel for small or invitation-based events
Local community calendars or listservs	Reaching audiences outside the Fulbright network

The Reminder Cadence That Works

Attendance often increases significantly when registrants receive a reminder one week before the event and again one day before. A single announcement, sent once, is easy to forget in a busy inbox – a second and third touch is what actually converts an interested person into an attendee.

Suggested cadence:

1. Save-the-date (5-6 weeks out)
2. Full announcement with registration link (4 weeks out)
3. Mid-point reminder to your broader list (2 weeks out)
4. Reminder to registered attendees (1 week out)
5. Final reminder to registered attendees (day before)

Common Mistake: Promoting only once, then being surprised by low turnout. Promotion is a campaign, not a single announcement.

BEFORE MOVING ON, MAKE SURE YOU HAVE...

A promotion plan mapped across at least 3-4 touchpoints

Content ready for each channel (email copy, social graphics, flyer if needed)

A reminder schedule set for registered attendees (1 week and 1 day out)

Confirmation that any partner organizations are promoting through their own channels

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Section 8: Volunteer Management

Volunteers are what make chapter events run – but only if they know exactly what they're responsible for. A general call for "help" produces far fewer responses than an ask for a specific, named role, because people are much more likely to say yes when they can picture exactly what they're signing up for.

Common Event Roles to Assign

Role	Responsibility
Registration desk	Checks in attendees, manages name tags, handles walk-ins

Greeter	Welcomes attendees, directs them to seating or registration
AV support	Manages microphones, slides, livestream
Timekeeper	Signals speakers/moderator on time remaining
Photographer	Captures photos for chapter records and future promotion
Setup/teardown crew	Arrives early, stays late
Speaker liaison	Meets speakers on arrival, manages their needs before/during the event
Accessibility point person	Fields accommodation requests and coordinates fulfillment day-of

Volunteer Recruitment Checklist

- List every role needed before recruiting anyone
- Assign one name to each role – avoid "co-owned" roles where responsibility can blur
- Send each volunteer a written role description, not just a verbal ask
- Confirm arrival time and duration expectations for each volunteer
- Send a brief written run-of-show to all volunteers 2-3 days before the event
- Have a backup plan (or backup person) for any role that's essential to the event running smoothly

Why written role descriptions matter: A volunteer who knows exactly what "greeter" means on the day – where to stand, what to say, when their shift ends – performs the role with far more confidence than one working from a vague verbal request made weeks earlier.

BEFORE MOVING ON, MAKE SURE YOU HAVE…

Every event role identified and named

Written role descriptions sent to each volunteer

A volunteer run-of-show distributed

Backup coverage identified for essential roles

Section 9: Accessibility

Accessibility isn't a final checklist item to add if there's time and budget left – it's a planning consideration from day one. Building it in early is both the right thing to do and the more efficient path: retrofitting accessibility into a fully planned event (a last-minute interpreter search, a venue swap for wheelchair access) is far harder and more expensive than planning for it from the start.

Physical Accessibility Checklist

- Venue has an accessible entrance, not just a "technically compliant" side door

- Accessible restrooms are available and clearly marked
- Seating includes wheelchair-accessible spaces integrated with general seating, not segregated to the back or sides
- Pathways are clear of cords, boxes, and other obstructions
- Signage is visible and legible from a seated position

Communication Accessibility Checklist

- ASL interpretation or live captioning offered when requested (and promoted as available in event materials, so people know to ask)
- Materials available in alternate formats (large print, digital) on request
- Microphones used consistently, including during audience Q&A – a common gap even at otherwise accessible events
- Virtual/livestream option considered for those unable to attend in person

Other Considerations

- Dietary accommodations (collected at registration) are actually available at the event, not just acknowledged
- Sensory considerations addressed for events with music, flashing lights, or crowded spaces
- Language access considered for events serving multilingual communities

Why this belongs early, not late: An accessibility need identified at registration – say, an ASL interpreter request – often needs 2-3 weeks' lead time to fulfill well. Chapters that treat accessibility as a day-of scramble either fail to meet the need or pay a rush premium for it.

Best Practice: State clearly in your registration form and promotional materials how to request an accommodation, and give a real deadline and contact person for those requests. This signals that accommodations are genuinely available, not a formality.

Before moving on, make sure you have...

Confirmed physical accessibility of your venue

A plan for communication accommodations (interpretation, captioning, alt-format materials)

A named point person for accessibility requests

Accommodation requests from registration reviewed and confirmed as fulfilled

Section 10: Day-Of Logistics

By the day of the event, the planning is mostly done – your job now is execution and troubleshooting. A clear day-of plan turns you from reactive to prepared.

Day-Of Checklist

- Arrive at the venue at least 60-90 minutes before doors open
- Confirm AV setup and test microphones, slides, and livestream before doors open
- Confirm signage is posted (parking, entrance, registration, restrooms, accessible entrance)
- Brief all volunteers in person on final run-of-show and any last-minute changes
- Confirm caterer arrival and setup, including any dietary-labeled items
- Set up registration table with printed attendee list, name tags, and materials
- Designate one person as the point of contact for on-the-spot decisions (the "day-of lead") so volunteers aren't guessing who to ask
- Take photos throughout the event for chapter records and future promotion
- Confirm teardown responsibilities and timing before the event starts, not after it ends

Handling the Unexpected

Something rarely goes exactly to plan – a speaker runs late, the projector won't connect, fewer or more people show up than expected. A few principles help:

1. **Designate a decision-maker.** One person (the day-of lead) should have final say on real-time adjustments, so volunteers aren't stuck waiting on a group decision mid-event.
2. **Build slack into your run-of-show.** A 5-minute buffer between segments absorbs small delays before they cascade.
3. **Keep a simple "if this, then that" list** for likely issues: if the speaker is delayed, extend networking time; if attendance is higher than expected, know where extra chairs are stored.

Common Mistake: Assuming the run-of-show will execute itself once printed. Someone needs to actively manage time throughout the event, not just plan it in advance.

Before moving on, make sure you have…

A named day-of lead with final decision authority

AV and signage confirmed on-site before doors open

Volunteers briefed in person

A simple contingency plan for the most likely disruptions

Section 11: Follow-Up

What happens in the 48 hours after your event shapes whether attendees come back next time – and whether speakers and partners are willing to work with your chapter again.

Follow-Up Checklist (within 48 hours)

- Send a thank-you email to all attendees, including a few event photos if available
- Send individual thank-you notes to speakers, panelists, and partner organizations

- Thank volunteers individually, naming their specific contribution
- Share event photos and highlights on chapter social media/newsletter
- Follow up individually with any high-value contacts made at the event (a lapsed alumnus who reconnected, a prospective volunteer, a partner organization contact)

Why speed matters here: A thank-you sent within a day or two lands while the event is still fresh in someone's mind. The same note sent two weeks later reads as an afterthought, even when the sentiment is identical.

Quick Tip: If your event goal included identifying future volunteers (see Section 1), the follow-up window is your best opportunity to make that specific ask – while their enthusiasm from the event is still active.

BEFORE MOVING ON, MAKE SURE YOU HAVE…

Thank-you communications sent to attendees, speakers, and volunteers

Event photos/content shared on chapter channels

Individual follow-up completed for key contacts made at the event

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Section 12: Evaluation

Evaluation closes the loop back to Section 1: did the event accomplish what you set out to do? This step is easy to skip once the event is over and everyone's ready to move on – but it's what turns one good event into a repeatable, improvable chapter practice.

Evaluation Checklist

- Compare final attendance to your original goal and estimate (Section 1 and 2)
- Review registration and no-show rates
- Send a short post-event survey to attendees (3-5 questions, sent within a few days while the event is still fresh)
- Hold a brief debrief with your planning committee and volunteers – what worked, what didn't, what to change next time
- Reconcile actual spending against your budget (Section 3)
- Document lessons learned somewhere your chapter can find them next year – not just in someone's memory

Sample Post-Event Survey Questions

1. How would you rate this event overall? (1-5 scale)
2. What was most valuable to you about this event?
3. What could we improve for next time?
4. Would you attend a similar event in the future?
5. Is there anything else you'd like to share with chapter leadership?

Debrief Questions for Your Planning Team

1. Did we meet the goal we set in Section 1?
2. What logistics issue took the most time to solve, and how could we prevent it next time?
3. Which promotion channel drove the most registrations?
4. Were there any accessibility requests we couldn't fulfill, and why?
5. What's one thing we should absolutely repeat next time? One thing we should absolutely change?

Why documentation matters: Chapter leadership changes over time. A short written debrief – even five bullet points – saves the next planning team from re-learning the same lessons your team just learned the hard way.

BEFORE MOVING ON, MAKE SURE YOU HAVE...

Attendance and budget reconciled against original goals

Post-event survey sent and results reviewed

A documented debrief shared with your chapter's leadership team or stored for future planners

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Quick Reference: The Full Chronological Checklist

Use this as a condensed at-a-glance version once you're familiar with the full guide.

1. **Goal Setting** – Write a one-sentence, measurable goal
2. **Audience Identification** – Define who needs to attend and why
3. **Budgeting** – Draft a full budget with contingency before committing to anything
4. **Venue Selection** – Lock in a venue that fits your audience, budget, and accessibility needs
5. **Speakers & Programming** – Confirm speakers and build a run-of-show
6. **Registration** – Launch registration with accommodation fields built in
7. **Promotion** – Run a multi-touch promotion campaign, not a single announcement
8. **Volunteer Management** – Assign named roles with written descriptions
9. **Accessibility** – Confirm physical and communication accommodations well in advance
10. **Day-Of Logistics** – Designate a decision-maker and arrive early
11. **Follow-Up** – Send thank-yous within 48 hours
12. **Evaluation** – Survey, debrief, and document lessons learned