

## Tufts Office of Alumni Relations and Advancement Communications

### Processes and Procedures for Invitations to TUAA Regional Chapter Events

[10/22/07]

This document aims to guide the successful marketing of chapter events. The strategic and prudent use of the web, email, and print invitations ensures a timely and professional approach. This process also reinforces a positive impression of the event and reflects well on the Tufts University Alumni Association. Staff in the Office of Alumni Relations (OAR) will be your contacts for event publicity; they work closely with staff in Advancement Communications on all print, web, and electronic marketing.

### General processes for web, email and print invitations

#### **Online registration and RSVP form**

Chapters are well served by doing as much promotion as possible on the TUAA website. Blast emails will link directly to calendar postings and, when necessary, to an online registration/RSVP form. Credit card information can be taken at this site for events that require payment. Money received by Tufts will be deposited into programming accounts managed by the Office of Alumni Relations. We recommend that online registration be used instead of asking alumni to print out an RSVP form from the website and faxing/ mailing it to the contact. Experience has shown that you get a stronger response and in a more timely manner because of built-in convenience. Please consult your Alumni Relations Officer on all budgetary matters as part of your initial planning process.

#### **Scheduling blast emails**

Blast emails are managed by Advancement Communications, where a master calendar of division-wide blasts is maintained. Individual blast emails must be carefully scheduled to avoid colliding with other alumni e-communications. **Your blast will be three weeks before the event's RSVP date.** In special cases, a second blast can go out shortly before the event if attendance is lower than desired. However, please regard the second blast however as a last resort!

If the chapter has organized more than one event around the same time, please coordinate a combined blast so that Advancement Communications can efficiently send one blast for all events. If you have additional alumni groups operating in your region (e.g., TAAP committees, Active Citizenship committees), please consult with group leaders to maximize publicity opportunities.

#### **Monthly e-newsletter**

The monthly e-newsletter (Tufts Alumni News) will include links to chapter and club calendar events already posted on the TUAA site. Events should be submitted to your OAR staff contact no later than the 10th of each month in order to be included in that month's e-newsletter. Your event will be included in the monthly newsletter, emailed to all alumni around the 15<sup>th</sup> of each month, except July and August.

#### **Broadnet mass voicemail services**

This tool, as the name implies, allows us to send pre-recorded voice messages to all alumni using contact information in our database. This tool can be used **to supplement** print invitations. Requests for voicemail services should be sent to your Alumni Relations **officer** 3-4 weeks before the event. Please allow 3-5 business days to gather data and record the voicemail. Allow

2 weeks time for RSVPs. Ideally, the local event coordinator records the voicemail. However, there may be instances where the special guest or speaker can record. Once the data and recording have been finalized, the message will be sent to all phone numbers on file (including mobile phones). Some tips for recording – it is best to keep the message under 1 minute; include all pertinent information, who, what, where, when, why I should attend, cost, and how to respond.

### **Shared procedures for web, email, and print**

**Due to the large number of requests we receive, it may take us up to 10 business days to begin your job.** Submit content in its entirety two weeks **before** work may actually begin. Such planning avoids rush jobs and the potential for errors. It also prevents poor attendance and possibly negative responses (“I wish I had known sooner!”); let’s assume people want to come to our events, but need to balance this event with many other obligations.

### **Procedures for web and email only (no print required)**

**Electronic communication should be submitted to OAR staff six weeks before the event date, following the steps for the master documents (see below)**

Preparation time: three weeks for the following:

- Create your web page for calendar posting
- Format online registration (five business day turn-around)
- Create and check HTML and plain text coding for blast email
- Coordinate scheduling: Blast email is scheduled to go out **three weeks** before RSVP date (usually RSVP date is one week prior to the event)

So, for example, a blast email for a Happy Hour on December 1, should be received by the Office of Alumni Relations by October 15.

### **Procedures for print invitations**

Successful invitations help alumni plan ahead so that they can attend our events. At Tufts, we follow the rule that mailed invitations should be received by alumni five weeks before an event. This policy drives all other work.

**For print invitations, submit content to OAR staff nine weeks before the event date.**

Preparation work: four weeks for the following:

- Create and confirm your master document: five working days
- Design and proof the invitation: five working days
- Prepare the document for printing, review the printer’s proof, and send to the mailhouse: 10 working days
- Mail delivery: Allow up to five days

In summary, printed invitations require planning ahead by 9 weeks -- 4 weeks to prepare and mail, and 5 weeks for the alumni to receive the invitation and respond). For example, preparation for the invitation featuring President Bacow on March 15, 2008, will need to begin January 8, 2008.

### **Master document process**

To ensure accuracy, we ask that all content be developed by following the steps below.

1. **Create one master document** upon which all subsequent marketing (web, electronic, and print) will be built. This file includes the following essentials.
  - Name of host chapter (all are chapters of the Tufts University Alumni Association)

- Name of event, including name of speaker if necessary
- Date and Time
- Location (if event is hosted at a home, make sure the host approves the use of their home address, telephone number, and other information on the website.)
- Cost
- Directions: Please provide succinct directions and/or a website if appropriate
- RSVP: To include:
  - RSVP deadline – typically two weeks before the event
  - The name and address, including email, of person who receives the RSVP
  - To whom checks should be made out
  - Is there an RSVP form required and included with the promotion? If there is one included in the print invitation, keep in mind we need additional time to print and mail the invitation in time for people to RSVP
  - Is there online registration and RSVP form? If so, indicate **[Put URL here]**
- Contact Information: Name of alumni and year of graduation

2. **Confirm details of the master copy** with all necessary people before you do step 3!

3. **Proof your final copy and fact check.**

4. **Alumni Relations staff will create your marketing documents** and give them to Advancement Communications. They include:

- Print Invitation copy
- Calendar listing copy
- Blast email copy

5. **Printing and Mailing completed**