



Chapter Event Planning Process And Timeline

Thank you for working with the NYSSCPA to develop high-quality chapter member engagement programs. We provide these guidelines to help you take advantage of the resources available as you plan events.

Our success in member acquisition and retention has largely been due to dedicated volunteers, like you, who donate your time and resources to planning and delivering successful networking and social events. Thank you for your continued commitment to the Society

The NYSSCPA team works with chapters and committees on hundreds of statewide and chapter events throughout the year.

Society and chapter roles during the chapter event planning process:

1. The NYSSCPA staff functions as high level chapter support for logistics and marketing based on information being provided in a timely manner by the chapter.
2. Chapters planning events are responsible for the programming and speaker sourcing, as well as supporting the marketing push with outreach to your personal and professional networks.

It is important that chapter event planners follow the process and timeline below to enable your event get the desired support and attendance required to be a success.

Event Planning Timeline

This 8 week timeline will help ensure critical event information is received in time to allow for the prescribed chapter marketing deliverables. Failing to meet these deadlines will compromise the marketing efforts and attendance of your event. Please reach out to your chapter liaisons, ldickenson@nysscpa.org or wtitus@nysscpa.org should you have any questions or need clarification on any items.

Weeks Before Event Date

8 weeks

Chapter submits completed chapter event request form at nysscpa.org/chaptersocialform.

7 weeks	Chapter registration page goes live, which will also be found on the NYSSCPA.org event calendar.
6 weeks	Event will be included in applicable Society bi-weekly event and Chapter Digest emails.
5 weeks	Chapter contact promotes on Exchange and to their network. Society includes in pertinent chapter emails.
4 weeks	Social media promotion goes live (for chapters with social media channels).
3 weeks	Chapter continues to promote through personal and professional platforms and contacts.
2 weeks	Chapter promotes again on Exchange and continues to promote through personal connections.
Event Day	Relax, and enjoy a well-developed and planned event.

Event Planning Considerations

When a completed [Social Event Form](#) is submitted at least eight weeks prior to an event, the chapter receives marketing support in Chapter Digests, Chapter Events emails, Society events emails and, if your chapter has a social media page, it can be listed on there as well. No Society promotion will go live before a completed Social Event Form is submitted.

The Society promotes dozens of events each week to targeted lists, but we know that members respond to personal outreach, chapter support is critical. To expand your reach, consider inviting other chapters to participate and promote.

➡ Please note, if aforementioned materials are not turned in at least 8 weeks out, chapters are only guaranteed the following promotion.

- 4-6 weeks out submission – inclusion in bi-weekly Society events emails, Chapter Events emails, NYSSCPA.org event calendar listing.
- 2-4 weeks out submission – inclusion in Chapter Events emails, if scheduled, and NYSSCPA.org event calendar listing.
- 2 weeks out or less submission – NYSSCPA.org event calendar listing

Tips:

1. **Plan Ahead:** A complete Social Event Form is your key to promotion. Gather information early, fill out the form clearly and with your target audience(s) in mind.
2. **Be Realistic:** Have an understanding of the size of your chapter mailing list. A successful event never garners more than 2% of any mailing list. If your chapter list only has 1200 people, you likely will not have more than 24 attendees.
3. **Use Your Contacts:** To hold a Society event, you must be prepared to promote throughout your network and encourage others in the chapter to do the same. Take advantage of workplace newsletters, Slack channels, complementary association message boards, personal social media, etc.
 - a. Word of mouth and personal invitations are powerful and will drive attendance.
4. **Additional Resources:** Post on Exchange early and often. If you would like an event flyer, please utilize the flyer templates found at nysscpa.org/chapters.
5. **University Student-focused events:** if the target audience for your event is college or university students and you'd like to do outreach to Campus Liasons, please send your program overview and event information to Dawne Troupe at dtroupe@nysscpa.org.

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