



ASSEMBLING A PLANNING TEAM WORKSHEET

CORE PLANNING TEAM ROLES

- 1. President:** Leads meetings; oversees planning of all pre-and post-reunion related activities and events, financials and communications; secures fulfillment of the Reunion; and demonstrates care of family and planning team members.
Recommendation(s): _____
- 2. Vice President:** Assists the President in conducting his/her responsibilities; performs duties of the President in his/her absence.
Recommendation(s): _____
- 3. Treasurer:** Keeps all financial records including dues and payments; submits detailed written reports; maintains the reunion bank account; makes deposits; writes checks and/or secures signatures on checks.
Recommendation(s): _____
- 4. Secretary:** Takes notes and attendance at meetings, sends notices and information to family; keeps track of family members contact information (phone no, address, email address, birthday, skill base, religious background, etc.)
Recommendation(s): _____
- 5. Family Historian/Genealogist:** Knows a lot about the family history; researches, chronicles, and archives family information for future reference; and keeps an ongoing record of your current family history.
Recommendation(s): _____
- 6. Planning Team Members:** Attend meetings; share in the exchange of ideas and suggestions for reunion and reunion-related activities; communicate information to immediate family members; support and assist in the planning and execution of activities needed to fulfill a successful reunion.
Recommendation(s): _____

ADDITIONAL TEAM ROLES

- 7. Representatives from each family branch:** Ensure that family members are kept up-to-date with the planning, and that the concerns and opinions of each branch are voiced with the planning team.
Recommendation(s): _____
- 8. Social Media/Communications:** Manages social media sites for the family, including website, Facebook, YouTube and Instagram.
Recommendation(s): _____
- 9. Event Planner/Organizer/Negotiator:** Plans out and organizes timetables for reunion-related events and activities leading up to and including the Reunion. Negotiates and secures reunion related contracts and costs.
Recommendation(s): _____
- 10. Marketing/Public Relations:** Develops and manages a favorable image for your Family Reunion; promotes reunion related events and activities; and builds momentum for reunion attendance.
Recommendation(s): _____