

BUDGETING KEYS FOR A SUCCESSFUL REUNION



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INTRODUCTION

Americans have always been willing to travel to meet with family or friends. Gathering with those family or friends is one of the most cost-effective ways to come together for fun. It's also the best way to spend quality time together.

A reunion of any scope and purpose will inevitably come with the challenges of financial planning and budgeting. When your aim is a fun get-together, nobody likes a costly surprise.

Understanding the expenses involved in reunion planning is a critical step to navigating budgeting challenges. There are tools you can use to help plan and budget, as well as ways to minimize expenses. This guide offers a step-by-step approach for creating a workable reunion budget and sticking to it.

These keys to planning and budgeting for a successful reunion are the perfect road map to success.



DEFINING THE SCOPE, PURPOSE AND TIMING

Understand the nature of the reunion you're organizing, whether it's a family, school, college, friends get-away or other type of reunion. Additionally, clarify the purpose of the event, whether it's a celebration, reminiscing, networking, or a combination of these. This initial step will guide your planning process and help you make decisions regarding the scale, location and activities of the reunion.

Planning a reunion budget should be done as early in the process as possible in order to give attendees a clear idea of timing and cost. This will allow them to budget accordingly. If you're working on a larger reunion (150+ attendees) you'll want to start planning 18-24 months in advance. Even a smaller reunion should allow for a 12-month notice to attendees.



Create a Guest List

Compile a list of potential attendees. Reach out to key stakeholders or representatives from the group you're organizing the reunion for to gather contact information. Estimate the number of people likely to attend based on past attendance rates or survey responses. Having an accurate guest list will enable you to budget for accommodations, food, and other expenses more effectively.

Informally gauging interest and budget per person, or per family, will help you start planning. You can now more accurately identify the location/destination, timing and major expenses involved such as lodging, food and travel/transportation costs.

Once you have an estimated guest list and a general idea of the scope of your event you can more accurately plan your budget. For scope you'll want to consider the age range of attendees, the goal of your reunion and the general budget range you're working within. If every invitee responds with affirmative interest and no cap to their budget, it's quite a different reunion than if the majority want to come, but only if the cost is less than \$100.

Budgeting Tools

There are plenty of digital tools you can use for planning your budget and tracking expenses. Some also allow you to track payments received. This is a handy tool as you start collecting deposits and final payments from attendees.

Here are a few apps that can be very helpful.

Goodbudget

Mint

Cheddar Up

Wally

Quicken

Tripcoin

Monarch

CopilotMoney

Each will allow you to organize your categories of expenses and track individual costs. Different committee members may want to organize their own budgets. You can also create an account specifically for your reunion and allow everyone permission to use it simultaneously.

Regardless how you use the apps, we strongly encourage you to review each and determine what is the best fit. However, if you prefer a simple spreadsheet to track your expenses and payments received, you can use this very basic template on the following page to get started.

CHOOSING A DESTINATION & VENUE



Considering the cost of travel for the majority of the attendees will certainly influence your destination of choice. If many are within driving distance that's a different budget concern than if many are flying. The latter can certainly impact families traveling with children needing to book multiple tickets.

Next, research and explore potential venues that align with the size and needs of your reunion. Consider factors such as location, capacity, facilities (e.g., parking, catering options, audiovisual equipment) and ambiance. Obtain quotes from multiple venues to compare costs and negotiate favorable terms.

Choosing the right venue within your budget is crucial as it sets the tone for the entire event. If you book a venue for your reunion, there's likely a fee for simply using the space, whether it's a conference center, banquet hall or even a small space in the park. For the latter permits may be needed, while for the former there may be catering charges in addition to the rental cost. You should consider the pros and cons of free spaces versus private spaces. Remember to consider that venues located away from your choice of lodging may require an additional transportation cost.

SETTING A BUDGET

Determine the total amount of money you're willing to spend on the reunion. Break down your budget into categories such as venue rental, catering, decorations, transportation, entertainment and miscellaneous expenses. Allocate funds to each category based on their priority and impact on the event. Be realistic about your financial resources and ensure your budget is feasible.



Event Date: _____

Event Location: _____

of Attendees: _____

ITEM	TOTAL COST	PER PERSON	PAYMENTS MADE	PAYMENTS RECEIVED	BALANCE OWED
VENUE RENTAL					
BREAKFAST					
LUNCH					
DINNER					
SNACKS					
DRINKS					
ENTERTAINMENT					
DECORATIONS					
PAPER PRODUCTS					
WEBSITE FEES					
PRINTING FEES					
TRANSPORTATION					
ACTIVITIES					
ESTIMATED TIPS					
MISCELLANEOUS					
TOTAL					

PRIORITIZING EXPENSES

Identify the most critical expenses that are essential for the success of the reunion. Venue rental, lodging, travel and catering are typically top priorities, as they directly affect the comfort and enjoyment of attendees. Allocate a larger portion of your budget to these key expenses, and adjust allocations for other items accordingly. Consider the preferences and expectations of your guests when prioritizing expenses.

We've already taken a look at the importance of travel expenses and how they impact destination and venue expenses. Choosing the best destination for your reunion will certainly impact the expense of travel and the number of attendees. For this reason, in your initial research it's critical you come to the best balance of travel expense and attendance. As you may have realized in our prior venue thoughts, where you choose to hold your event is only limited by your imagination and budget.



Lodging

If the reunion is far from home for the majority of attendees and/or the reunion requires more than a few nights' stay, lodging can be a significant cost. Being careful with lodging expenses can help more folks attend. Consider a hotel's value season to hold your reunion, or large vacation homes to help spread cost over multiple families. Alternatives like camping, glamping or dude ranches can each be a fun way to travel and save. Hotels often provide group rates, but require deposits, single payer pre-payment, a rooming list 30 days in advance and tight cancellation policies. They will also provide a room block for your reunion, but double check before accepting what the rate might be for a direct booking to ensure your getting the best value.

Food

Whether you have a catered event at your chosen venue, gather everyone at a restaurant, or simply do a cookout at the park, food can certainly add up for groups. The big meal(s) are not your only consideration. Is there breakfast at the hotel? How will lunch be handled? Should box lunches be made available? How will snacks be handled? A potluck is always a good solution if your reunions is where most folks can drive to, or a venue with a kitchen.

Drinks

Just like food, the cost of drinks can definitely add up. Water, fruit juices, energy drinks and soft drinks should be a necessity for all ages. For an evening event take a close look at open bar vs. cash bar, keeping in mind the ages of all attendees and the overall focus of the reunion you're planning.



Entertainment

From local attractions to DJs, entertainment can be a big-ticket item. Regardless of the scope of your reunion, there needs to be some fun for everyone's enjoyment. The costs can be large lump sums or they might be smaller but add up over time. Consider a featured evening entertainment option that is appropriate for all age groups. Dinner and a show are popular, whether at a catered event or restaurant. Also, offer a few additional half- or full-day options with lunch included that might be better for the budget. Remember to research transportation options if entertainment will take place away from regular accommodations.



Small Expenses for a Reunion

Certainly, the larger expenses are a major concern as you begin planning, but these smaller costs add up. Exercise caution and do not personally foot the bill for these items. However, do consider all of these potential costs when planning your budget.

Decorations

No matter how little decorating you choose to do, this cost needs to be taken into consideration when planning and budgeting. Banners, balloons and other items might seem miniscule, but add up quickly.



Invitations

Depending on the size of your reunion's guest list, invitations can morph into a major expense. You may want to send a "Save the Date" immediately upon confirming the dates, destination and venue. When ready, send a formal printed invitation with all the necessary information regarding your online app for deposits and payments. Zazzle can handle the printing of both mailings. Remember to budget the postage! Certainly, you can create "save the date," invitations and reminders online, or through email templates. Regardless of the method you choose, an accurate guest list with home or email addresses is critical.

Photo Printing

Photos from previous reunions are always a fun decoration. Make it a collective effort for all attendees to print and bring a photo from the past.

Other Paper Products

Napkins, name tags, a sign-in sheet and coloring books for the kids are little items that are often necessary but can be overlooked. Make certain you include them in your planning and budgeting to get a clearer view of the cost.

Website Management

For larger reunions, a website can be very beneficial to keep organized and collect or raise money. There are even event-specific programs you can buy. For this you will need to get a domain name and website hosting. Eventcreate offers a few good website packages for reunions.

Taxes and Tips

Remember that taxes will be added to everything you purchase. Tips will often be necessary for the catering and restaurant servers, bartenders, entertainers and housekeepers. When getting prices make sure that taxes and tips are included, whenever possible.

Other

It's a good idea to add 5-10% to your total budget for the "other" category. You'll definitely have miscellaneous items that don't fit into a category, or things that creep in at the end.

8 WAYS TO SAVE

Regardless of what your budget looks like, there are always ways to save. The following suggestions will help you stay in control of your budget.



1 Group (and Other) Discounts

We've already touched on the value of getting a group rate for lodging. There are a few hoops you'll need to jump through to get a nice discount on rooms. Properties frequently require a single payer, deposit, room list and specific cancellation policies to earn a group discount. The savings to your group can be significant. Remember this caveat when speaking to the hotel. Ask about the number of paid rooms you'll need to receive a complimentary room, or two. Taking that cost from the per room rate makes your attendees room rate look even better. Group rates also apply to restaurants, attractions and tours. When a group rate isn't feasible, Individual attendee discounts could potentially be available for seniors, veterans, students and kids.

Wherever your reunion will be held, reach out to the local Convention & Visitors Bureau (CVB), Chamber of Commerce (CoC), or Destination Marketing Organization (DMO). They'll be helpful in suggesting discounts for large groups on tours and activities in their destination.



2 Off-Season Travel

Planning and budgeting around off-season travel is worth considering. Most family travel is planned around when kids are out of school, specifically the summer months. That demand drives up prices and often interferes with youth sports, camps and bible study. If at all possible try to schedule your reunion in the shoulder, or value season. Determine when the kids are really going back to school, and note that school start and end dates vary widely by state. Is there a long holiday weekend that works – Memorial Day, Veterans Day, Thanksgiving? Also, remember the slower season isn't the same in every destination. A popular ski resort in the winter might actually have great deals in the summer. Finally, remember that large annual events might be a hinderance to getting good rates for a reunion group. You may have a specific destination in mind, but be flexible on your dates.

3 Destination Options

We've referenced off-season travel but you can also opt for less popular destinations to lower your total cost. We all would enjoy Napa Valley, or Orlando, but let's not follow the masses. Choosing a lesser known destination doesn't mean that activities and worthwhile places are missing. Planning your reunion in a new locale can become a fun adventure in itself. This is where Destinationreunions.com provides inspiration.



4 Crowdsourcing Everything

Crowdsourcing is great for digital things like fundraising online or brainstorming opinions on platforms like Facebook. You should crowdsourcing ideas and suggestions so decisions aren't the sole burden of a single planner or small committee. Create polls on Facebook to see the most popular activities, destinations, dates, music...whatever you want. Just remember the older folks and don't exclude their opinions if they're not on Facebook. By crowdsourcing ideas and suggestions, you might also uncover some hidden talents within the group. Maybe a cousin has been honing those videography skills or an aunt has connections at that hotel chain you've been looking at -- you never know if you don't ask.

In a similar thread, a potluck is a great idea to distribute food and drink costs as appropriate. If not a potluck, at least ask everyone to contribute snacks and drinks to have around as needed. If your reunion will last several days, consider organizing a few big meals and then potluck or share responsibility for the others. This is most easily done if you have full kitchens at vacation homes, rather than hotel rooms.



5 Tech Tools to Use

There are countless ways you can use technology to your benefit when planning your reunion budget and dealing with the entire accounting process. A few have already been mentioned, including Mint, Quicken, GoodBudget, and even Facebook. There are many more.

Photos

Consider other ways to save, such as creating a hashtag for social media in order to aggregate all the photos and videos taken during the reunion. With smartphones having such high-quality cameras these days, you can cut the cost of a professional photographer if necessary. And social media helps you to organize it all. Other options include cloud folders via Google or Dropbox, or websites like Cluster or Shutterfly for collecting photos and even ordering scrapbooks or other physical products.

Invitations

You can use Facebook or build a website to organize all the details in one location for everyone. But you'll still want to send a more formal invitation with a way of collecting RSVPs. Websites like Evite, Paperless Post or Punchbowl are all great options for creating fun or fancy invitations online easily.

Music

Hiring a band could be fun, but you can also save big by using popular music streaming apps. Bring a good speaker (or a few) and have volunteers create playlists for various times as needed. Have a variety of volunteers and consider pairing a younger tech-savvy attendee with an older attendee to create a diverse playlist that will appeal to everyone.



Communication

When planning and coordinating with everyone, there are plenty of digital tools you can use for free. Zoom, Teams or Facebook Messenger can be used for video chats during the planning process. SurveyMonkey or Doodle can be used for scheduling times to chat or even for finding the best dates for the reunion.

6 Fundraising Options

Fundraising can be an effective way to lower the overall cost for your reunion. This could take different forms, depending on the type

and scope of your reunion. Consider simply asking for donations from all who are invited. You might find some folks can't attend, but still want to contribute to defray the costs. Some attendees will be generous and try to help lower costs for other attendees.

You can also consider raising funds via various events:

- Local attendees gather for a bake sale
- Raffle or auction (online or in-person). Attendees donate services or items, or broaden your reach by asking businesses and professionals to donate if your reunion is large-scale.
- Walk, run, ride, or swim for donations
- Car washes (a kids' favorite)
- A garage sale



7 Maximize Rewards and Referrals

This might not apply directly to the overall reunion budget, but it can be very helpful for each attendee to be reminded of during the planning and budgeting process.

Credit cards often come with rewards programs that might include airline miles, hotel discounts or rental car rewards. This goes back to crowdsourcing, but you should ask all attendees about these options. If someone can get an even better deal for lodging or transportation simply by using their credit card instead of yours for the booking, then it's definitely helpful.

Another option is referrals. If an attendee has never booked on Airbnb, for example, then a discount can be applied by simply using a referral link from another attendee. Providing a space (on Facebook or another chat option) where attendees can share their referral links, discount codes, and rewards options can help everyone to save a little more along the way.



8 Educate and Inform Attendees

It never hurts to offer information and education to help everyone save a little bit more. Beyond the referral links and discount options that you can pool via various attendees, you should also consider other ways to save. If lots of attendees will be flying in, make sure they set up their own airfare alerts. Some airlines also offer discounts for groups, so try to coordinate folks who could fly from the same origin or hub airport.

Consider coordinating arrivals to get onto a shuttle bus or uber together instead of everyone renting their own car. These types of details can help everyone save on the big-ticket items, and can be easily coordinated using simple tools like spreadsheets and Facebook or other chat options.

COLLECTING MONEY

No longer do you have to collect checks and run to the bank. There are several apps you can use for collecting money from your attendees that will be helpful based on the number of people sending payments as well as the demographics of your group. If most attendees are tech-savvy, you should be able to manage the vast majority of payments through these systems.

There are a few things to consider as you use these tools, however. Some might add fees for certain types of transactions. For example, when sending money via PayPal, the sender must select the option of sending to friends/family in order to avoid a fee being charged. If your reunion happens to be internationally-based, consider transaction fees and exchange rates as well. Also remember that fees are sometimes added for installment or payment plans, if you opt to use those for vendors.

For collecting money via online payments, here are a few options:

1. Cheddar Up A versatile platform designed to streamline group collections by combining payment processing with customizable forms and sign-ups. Ideal for organizations such as PTAs, HOAs, and non-profits, it enables users to create collection pages, share links, and start receiving payments promptly. The platform supports various activities, including fundraising, event management, membership dues, and merchandise sales. Notably, Cheddar Up offers a seamless payment experience for contributors, eliminating the need for them to download an app or create an account. Additionally, it provides tools for in-person transactions through Bluetooth card readers and mobile apps, ensuring comprehensive tracking and management of all collections.



2. Venmo: This app is used by most American millennials, but it's also gaining popularity in other age groups. You can set up your account on your smartphone and send money to any contact in your phone who also uses the app. It's that simple. (Zelle works the same way)

3. PayPal: Venmo is actually owned by PayPal, but PayPal has been around a lot longer and makes some folks feel more comfortable. It can be used just as easily on a desktop as it can on a smartphone. A sender also doesn't need an account in order to send money. You can request a payment easily and the sender will just enter credit or debit card details to finalize the transaction.

Always remember to track every payment received. You should have a spreadsheet or use one of the budgeting apps mentioned previously and track all incoming and outgoing payments. Keeping accurate, updated records is your best bet for a frictionless budgeting role.

PREVENTING LAST-MINUTE COST ESCALATIONS



When planning a large event, there are always a few expenses or issues that somehow show up. That's why we recommend including a 5-10% cushion in your total budget for "other" or "miscellaneous" expenses. Most typically, last-minute costs are related to travel or to misunderstandings between the organizers and attendees.

Trying to avoid the latter situation, we recommend you follow the steps outlined throughout this whitepaper to prepare your budget as accurately as possible and to keep open lines of communication with guests along the way. Being open about the costs and planning will keep everyone looped in and help you to avoid surprises.

We also recommend you take a deposit to confirm attendance from every individual. The amount you charge is up to you and will be largely based on what costs you include in the total fee. For example, if you're booking vacation rental homes that house large groups of people, you certainly want a deposit upfront from whoever wants a space in that house. Sites like Airbnb often require at least 50% to book the house, so it's fair to ask your attendees for 50% upfront as well. Hotel/Resort accommodations offering a group discount will also require a deposit to block the rooms. For attendees booking their own lodging, you might ask for a 25% deposit on the anticipated reunion activity costs. This can help you with vendor deposits and bookings, without burdening your guests too much too early in the process.

If you work out those basic details first and already have an accurate budget for your reunion, then you can probably avoid big surprise fees. Your best bet is to always be honest with your attendees and let them know why any costs have changed along the way. If an entire family has to back out due to an emergency, your per-person costs may change. But explaining that to the other attendees can be easier than suddenly just demanding more per person.

Also, many last-minute costs tend to be travel specific. Something important to remember is that more than half of Americans leave paid vacation days unused each year. The U.S. Travel Association even started a national “Plan for Vacation Day” on the last Tuesday in January each year to encourage Americans to book a trip. It’s the perfect day to remind your reunion guest list of any trends that might impact their travel.

A few things to keep in mind (and to mention to your attendees) when booking include the following:



- **Baggage fees:** Check your airline’s policies, but also remember to check your credit card reward program for any airline-specific bonus options you might have. Baggage fees can add up for families especially! If some families are driving, coordinate so they bring the large shampoos and sunscreens and let the flyers avoid checked baggage altogether. This goes back to open communication and crowdsourcing to keep costs down.

- **Airport food:** Check that credit card again for airport lounge access! You can save quite a lot in food or drink costs if you have access to a lounge during layovers.

- **Insurance:** Renting a car upon arrival? Check that credit card again! Some credit cards will offer insurance coverage, but you want to make sure it applies to your location and specific needs. Some, for example, won’t cover any off-road damage, so your campground or dude ranch may pose a problem if you have tire damage.

Throughout the reunion (especially if it's more than a single day) other costs can come up.

This might include food and drinks, activities or transportation costs. If you can't make the reunion all-inclusive, then be sure to consider the possible extra costs while planning. These should be fair estimates that you can provide to attendees so they can budget their trip accordingly.

Consider how densely-packed the schedule is and look at where families or groups might decide to venture out. If those excursions or meals are not included in your total costs, give the attendees a heads-up so they can plan accordingly. They will feel better prepared to budget as long as they are properly informed.

With that said, costs can still creep up on the attendees who haven't been paying attention during the planning process. To minimize these issues, communication is vital.



If you're on a big group text message, inform everyone whenever you send important information by email so it stands out from the gifs and emojis that can overwhelm a conversation.



Organize the definite and potential costs in very simple terms in your emails, if that's how you're communicating all reunion details. If you're using a Facebook group or event page, pin these details to the top and post regularly to remind folks to review this very important information. If you're on a big group text message, inform everyone whenever you send important information by email so it stands out from the gifs and emojis that can overwhelm a conversation.

However you do it, be sure to communicate the budget openly with everyone to try to minimize the surprises and concerns along the way.



CONCLUSION

Budgeting for a reunion can certainly be a challenge. From the big expenses to all those tiny little details, the costs certainly have to be considered and managed throughout the planning process. We recommend you utilize the tools mentioned and all the opportunities for saving money along the way.

If everyone feels like the reunion was valuable, then you're more likely to make this a regular event. Remember, with proper planning, plenty of time, and lots of open communication, you can and should manage it all without an accounting degree. Although, if someone in the family actually is an accountant...maybe ask for a little help.

Additional Resources

Looking for more tips? Destination Reunions has everything you need to plan the perfect reunion. Here are a few resources to get you started.

Digital Magazine

Published annually in March, Destination Reunions is available at the click of a button. The magazine covers everything from destination advice to best practices to practical tips and more. Download the digital edition [here](#).

White Papers

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