

## OVERVIEW | Creating an Event Plan

WHEN HOSTING AN EVENT, developing a plan will allow you to move forward in an organized fashion and create an environment for success.

There are six steps to developing an Event Plan:

1. Organization and Community Assessment
2. Goal Setting
3. Planning
4. Implementation
5. Post Event Assessment
6. Administrative Decision Making

#### STEP 1: ORGANIZATION AND COMMUNITY ASSESSMENT

If you are planning an “open to the public” event, consider the elements below. If you are planning a private “invitation only” event, these elements may not apply.

##### **Current Operations**

Determine what activities and programs are already in place and serving the needs of the community.

Will your efforts be duplicating or contradicting existing programs?

Have your previous activities/events met the goals of your organization, furthered your mission, etc.?

##### **Need**

Is there a need for an event? If a need exists, what type of event would best suit the need?

##### **Brainstorm with Your Organization**

Discuss your goals and mission with your planning group as needed. What activities/events would they suggest/support? Use both obtrusive measures (asking stakeholders to supply program ideas) and unobtrusive measures (such as consulting with the target audience).

##### **Organization Environment**

Consider the organization’s mission, history, and political climate and views of significant decision makers.

Are you providing a perspective of an issue that may be viewed as controversial? If so, how are you creating a welcoming environment for the community as you move forward?

##### **Resources**

Determine the availability and skill levels of your organization leaders, members, and volunteers; anticipated costs, potential funding sources, and availability of money; available resources such as space, furnishings, equipment, and services.

How many individuals will support the development of the project (who will help you plan and coordinate details)? Are they skilled in the areas that will allow successful completion of the project?

What are the anticipated costs and what are “free” resources? Investigate the large items (performers, space, food, etc.) and estimate the small items (marketing, decorations, etc.).

What funds are currently available?

Who can we target for additional funding resources?

What environment do you want to create?



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Are the expenses reasonable? Estimated cost per person?

What facility will accommodate your event?

What resources are available (such as space, furnishings, equipment, and services)?

What support services do you need?

Once your organization answers these questions, check back periodically to see how your event plan plays out.

### *Setting Goals for Your Event*

#### STEP 2: GOAL SETTING

##### **Target Population**

Identify who the program is intended for and take steps accordingly to be appropriately inclusive or restrictive in planning.

What types of marketing will grab the attention of your target audience?

What marketing strategies will get them through the door?

##### **Desired Outcomes/Objectives**

Be clear about what you expect to accomplish and what you plan to achieve. Indicate for whom and under what conditions the outcomes should occur. Since broad-based goals are difficult to evaluate, set specific, measurable objectives.

Is there an educational component of your activity?

Is community building intended?

Is this a recruitment activity for your organization?

How will you measure if your goals were achieved?

##### **Brainstorm Ideas with Your Organization**

At this stage all ideas are good ideas. Start by asking these questions:

What types of activities will allow you to meet your goals?

What scope of activity can your existing resources support?

What is your organization committed to moving forward?

##### **Explore the Idea of Partnerships**

Our organization is big, but many groups have the same goals. Partnering with others can share the work load or get more mileage out of the work that you do.

Is there a sponsor component to your event? See if there are current or prospective sponsors who may be interested in the activity that you are planning.

Think of others who might be interested in your activity and talk to them about it. They may have some great ideas, and you might end up with some new connections that will be helpful to you on other projects as a bonus!

### *Planning for the Event*

#### STEP 3: PLANNING

##### **Planning Team**

Establish a small but effective working group with a broad range of skills that is able to function as a team. The team must include members of the target population or others affected by the program, particularly if the target group is not a mainstream group.

Brainstorm for the event:



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What are the major components of your event? Establish an event committee and then create a sub-committee for each component.

What role will your stakeholder(s) play? Remember organizations' Presidents are responsible for the wellness of the organization. This does not mean the management of events.

Establish an Event Coordinator position for this project, this will allow the stakeholders to participate in the program instead of managing it.

### Approach

Consider your target population and consider how the group learns, what media is available, what delivery system will be most effective, and whether to use convergent thinking to focus the planning group or a divergent approach to consider different learning styles.

How will the planning committee develop an environment to achieve the goals?

How will the planning committee be organized for success?

### Initial Extent of the Program

Determine the initial scope of the program: one hour, multiple hours, multiple days, simple or complex (a speaker or a dinner, dance and speaker), etc.

What type of program will allow you to meet your goals?

What scope of activity can your existing resources support?

Does the identified venue (location) allow you to capitalize on seating capacity?

Moving forward, what is the commitment of your planning committee?

### Training

Compare the skills and abilities of the committee members against the tasks to be performed to determine what training is required. Build in enough time to allow skill development, including training the trainers if appropriate.

What committee members are best suited for what tasks?

Do you need to allow extra time to get your/the committee prepared to move this activity forward?

### Timeline

Determine a target date and work backward to establish a realistic, week-by-week activity plan. Select a date and time most conducive to the target population's needs and circumstances. Avoid conflicting with major traditional activities, religious holy days or other special events observed by different members of the community.

How many weeks are there between now and your event? Is there realistically enough time to plan the event?

Have each sub-committee create a backwards timeline for their activities. Use this as a touchstone to track the planning progress.

### Budget

Determine the actual fiscal resources necessary to complete the program, including all costs for personnel, materials, space, marketing, food, transportation, equipment, etc.

Does your current available budget cover these costs?

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Do you need to identify a plan to generate more money?

Will you charge a registration or attendance fee? If so, what will the cost need to be? Or will attendance be free?

### *Implementing the Plan*

#### STEP 4: IMPLEMENTATION

#### **Responsibilities**

Delegate tasks and responsibilities, identifying clear lines of accountability, reporting relationships, and deadlines.

- Be realistic about task load.

- Keep in mind available amount of time.

- Allow people to identify others to support the work.

- Listen when someone says that he/she is swamped. Identify others to help.

- Do not let things slip through the cracks and become a crisis.

- Be proactive.

#### **Publicity**

Catch the attention of your target group and make them want to seek more information. Use a variety of media and techniques. It may not be so much advertising the event as highlighting your organization. Involve members of the targeted group in designing the campaign.

Has your event historically been a sell out? If so, plan to have a short time period for advertising the event. Always include the registration location, cost and availability in your marketing. Advertise the event a minimum of one week in advance of the opening of registration.

Remember to include an ADA statement in all of your marketing. 'For accommodations related to accessibility contact, \_\_\_\_\_ by \_\_\_\_\_.'

If you wish to use photography of people in any way make sure to complete a photo release form for each person featured.

#### **Location**

The location of the program and your knowledge of it is critical to the success of your program. Take into consideration the traffic flow, available square footage, possible set-up configurations, lighting, access, parking, technology and equipment.

Set a meeting with the facility staff early in the planning process. Tell your event story; allow them to tell you what is possible. With enough time and a bit of money, almost anything is possible.

Set specific times to meet with the facility staff throughout the planning process.

Communicate all needs and changes well in advance of the event.

Document all of your interactions; follow up all conversations with an email outlining your perceived agreements.

#### **Equipment**

Be certain adequate amounts of all needed materials are on hand and in good working order. If a trained technician is required to operate a device, be sure to schedule that person.

Check all equipment prior to the beginning of your event! Do not assume that anything works.

Be certain to get specific equipment needs for all performers prior to the event day. How many microphones, amp and voltage requirements, what type of lighting, etc.



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**Evaluation**

Collect evaluative responses from participants. Solicit both process evaluations, on how well the planning and implementation went, and product evaluations, on the elements contained in the program itself. Use a variety of media for evaluation: face-to-face interviews, written forms, telephone calls, suggestion cards.

These are the first four steps in creating a comprehensive event plan. Organizations that take the time and make the effort to move forward in this way will have a comprehensive guide outlining the good work of the organization and an opportunity to raise the bar of success of their events.

*Evaluating the Success of Your Event*

## STEP 5: POST EVENT ASSESSMENT

**Analysis**

Create tools to determine if the program planning and program met the intended goals.

Provide program participants the opportunity to submit an evaluation on the event. Ask for feedback on all of the components of the event.

Follow up with all service providers to evaluate the services provided, what worked — what did not work.

Review evaluation data and relate the information to program goals, objectives, and anticipated outcomes. Prepare a report applicable to future programs.

**Recognition and Rewards**

Identify individuals and groups who contributed significantly to the success of the program, including program planners, participants and sponsors to publicly acknowledge and celebrate their roles.

Within two weeks of the close of the event, follow up with appreciation by e-mail, cards, etc.

**Unexpected Outcomes**

Identify activities or events that were not part of the original plan and determine whether they impeded or enhanced the program.

**Fiscal Evaluation**

Determine how well actual expenses matched anticipated costs for each program component. Identify unusual factors that may account for any change. Document all costs.

**Programmers Reactions**

Collect evaluative data from program planners, including suggestions for potential changes. Ask about both process and product.

Have the members of the planning committee identify the strengths and weaknesses of the process and product, and what, if any, skills and abilities they further developed.

**Ecological Impact**

Make sure the success of the program did not come at the expense of some element of the environment. Determine the impact of the program on the community as a whole, on other programs, on physical space and its use, on non-targeted segments of the population, and on the mission and goals of the organization.

**Community Building**

View the program in terms of its effect on efforts to develop positive relationships among all segments of the community.



**Program Modifications**

Use all of the evaluation data to identify suggestions for program modifications. Make appropriate recommendations; even small changes can often bring a program closer to its stated goals and objectives.

Showing appreciation for the groups and individuals who helped to make your event a success builds good relations for future projects that you do. **DO NOT** skip the step of showing gratitude for others, no matter how busy life gets or how tired you are after the event.

*What to Do Now That the Event is Over*

## STEP 6: ADMINISTRATIVE DECISION MAKING

**Future Plans**

After examining all the information compiled in the post assessment step, decide on one of three actions for the future: modification, abandonment, or continuation.

If you are committed to continuing the program, support the next team of event planners by securing a possible location for the next event.

Create a document to pass on to the next coordinator or to jog your memory for the next time you produce this event. Do this before too much time passes so you can note details and suggestions for improvement.