



Event Planning Guide

Introduction

Properly planned and implemented community events can be highly effective for spreading messages about the importance of North Carolina Extension & Community Association. If they're designed to be entertaining and/or educational, well-planned events can draw a great deal of attention to the outstanding work you are doing and the services you provide for your community.

Holding events throughout the year can help ensure that ECA is a topic that stays on audiences' minds year-round.

This event-planning guide was developed to assist you with planning and holding successful community events that can push your programs to the next level.

Nine steps to a successful event:

1. Develop an idea and gather information.
2. Select a date and location.
3. Look for community partnerships.
4. Plan a budget and secure funding.
5. Develop a dynamic program.
6. Determine special needs and arrange catering.
7. Publicize the event.
8. Finalize all details and execute plan.
9. Follow-up and evaluate event.

Planning an Event

Develop an idea and gather information

This is the most critical step when planning an event. Some things to consider during this part of the process:

1. What type of event do you want to do?
2. What is the purpose of your event?
3. Who is the intended audience?
4. Who will present the program?
5. When and where will the event be held?
6. If funding is required, what are the potential sources for funding?

Have these basics in mind before you begin planning the event.

- What resources does your own organization have -- manpower, budget, etc.?
- Are there other individuals and organizations in your community that can collaborate with you? These organizations may be commercial, nonprofit and/or governmental.
- Budget, Budget Budget. Keep the bottom-line in focus from the beginning so you aren't caught short in the end.
- Don't forget to send out meeting minutes to keep everyone on track!

Setting up a planning team or committee

Gather a planning team or committee of people within your own organization as well as within other community organizations that might have an interest in this topic. Consider including people who are prominent in your community or offer like-services to yours on the team. Their perspectives and contacts with other members of the audience will be a valuable asset to your planning.

People with the following skills and experience should also be recruited for the committee:

- Strong leadership skills (committee chair)
- An eye for detail (logistics)
- The ability to raise money, if funds aren't available for the event (development)
- Media relations experience
- Event program planning experience

Once your team/committee is assembled, you should hold a consensus-building session to answer specific questions:

What are the goals/objectives of the event?

- What do you want members of your community to get out of participating in the event?

Developing an Event Timeline

To organize logistics for the event, you will need to track who is responsible for which tasks and when tasks need to be completed. An event planning timeline is a useful tool.

Developing a timeline, which includes specific milestones and due dates, should be one of the first tasks for the event planning committee/team. Using a timeline will help you to monitor progress toward the event. The timeline should identify the person or organization responsible for each task. The planning committee chairperson should circulate the timeline to all committee members and update it on a regular basis. Hold regular planning meetings with the

Who is the target audience?

What resources are available?

- Do you have a budget or do you need to raise funds to hold the event?
- Are staff members or volunteers available to plan and work the event?
- Can you access in-kind services, such as pro bono public relations services?
- Do you have a resource for acquiring free giveaways?
- Should you partner with other organizations to leverage existing resources?

What type of event do you want to hold?

- Seminar, health fair, luncheon, walk/run, performance?

Where should the event be held and when?

- Will this event be held outside/inside? Do you need to reserve space? If so, what type of space? Are permits required for this type of event? How many people should it accommodate?

committee, and track progress toward milestones at each planning meeting. If your group is large enough, you may want to set up subcommittees to handle separate components of the event—for example, logistics, partnership development, publicity, and program/agenda.

The amount of planning time will vary, depending on the type of event(s) you are planning. For example, it may take several months to plan a health fair, but only a few weeks to plan a press conference.

Tips and Tricks - FUNDING & BUDGET

- Prepare budget spreadsheet
- What expenses need to be considered?
 - Printed materials such as invitations / RSVP cards and programs
 - Postage
 - Memento
 - Honorarium and travel expenses for speaker(s)
 - Signage
 - Catering
 - Photographer
 - Tent, stage, podium, chairs, tables, lighting
 - Electronics such as sound system, LCD projector, DVD, Laptop
 - Flowers, plants, balloons
 - Security
 - Other items such as shovels and hardhats with insignia for groundbreakings or ribbons and scissors for ribbon cutting events
- Who is paying for the event?
 - University – identify unit(s) and contact
 - County – identify organization and contact
 - Combination of both
- Who will have approval authority for expenditures?

Tips and Tricks - VENUE

- At least 3 months prior to the event, determine precise area for setup to include stage, general seating, VIP seating, media location, registration table
- Determine onsite registration procedures
- Determine number and type of volunteers needed – students, faculty, staff, others
- Determine event signage and stage backdrop, if needed
- Make plans for traffic control and parking
- Contact local law enforcement well in advance to arrange for safety and security needs and discuss issues related to VIP attendance
- Make arrangements for transportation needs such as VIP or speaker transportation and bus transportation for guests
- Contact vendor for tent, stage, podium, chairs, tables, tablecloths
- Contact vendor or electronics such as sound system, lighting, LCD projector, DVD, Laptop
- Contact vendor for flowers, plants, balloons, other decorations
- Consider site preparation (special cleaning, equipment and trash removal)

Tips and Tricks – INVITATIONS & RSVP

- Invitation style should provide an idea of the nature of the event such as a formal or casual
- Invitation should address who, what, when, where, why
- Include the following information:
 - Hosts name(s)
 - Date and time

- Directions (perhaps include a small map)
 - Parking information
- Appropriate dress
- Properly use logos and wordmarks
- Create database of guest list, paying attention to special groups like legislators, local government officials
- Set response deadline at least 10 days prior to the event
- Consider whether you want acceptance only responses
- Enclose RSVP with envelope
- Place order for invitations and RSVP cards eight weeks prior to the event
- Mail invitations and RSVP four to six weeks prior to the event
- Telephone responses should be acknowledged by a live voice
- Establish voice mailbox message for after hours to acknowledge receipt
- Establish email address for responses (Return acknowledgement should be made)

Tips and Tricks - FOOD & BEVERAGE

- Determine precise location for food and beverage service.
- Contact caterers at least two months prior to the event to review menu and estimated cost.
- Meet with caterer two weeks prior to the event on site to discuss setup and determine what food and beverage will be served.
- Send final count to caterer one week prior to the event.
- Contact caterer one day prior to the event to verify all arrangements.

Tips and Tricks – PROGRAM

- Consider purpose, goal, and audience for event three – four months prior to the event.
- Identify activities and order of program two – three months prior.
- Appoint an emcee.
- Determine speakers – how many and in what order.
 - Write script or talking points.
 - If Extension Director or Dean is speaker, then talking points and order of program need to be provided to their offices at least two weeks prior to the event.
- Arrange for design of printed program. Consider using same designer as for invitations to keep consistent look.
- Approve final program four weeks prior to the event.
- Speaker order depends upon the event.
- Print program one week prior to event to allow for last minute changes.

Promoting the Event

To be successful, you need strong attendance for your event, and this is directly tied to how well you promote the event to your target audience. You will want to use every means you have to get the word out through both the media and community channels.

Partners and other community organizations can be effective in using their own networks to help you with promotion. Media channels such as radio, television, cable television, and newspapers offer many opportunities for promoting your event.

Community and organizational channels offer a number of ways to promote your event. Ask every partner and interested organization to help you by:

- Displaying announcements of the event.
- Making announcements/handing out promotional notices at community and faith-based meetings and other gatherings.
- Including notices about the event in their newsletters and on websites.
- Handing out/displaying promotional brochures at their workplaces and businesses.
- Helping you pay for commercial advertising, if necessary.
- Encouraging participation at the event by employees/clients/customers.

Tips and Tricks - PUBLICITY

- Determine what publicity is desired.
- Put a member of the local media (newspaper/TV/radio) on your planning committee!
- Contact NC State News Services for on campus coverage, if needed.
- Plan area for media at the venue including location of TV cameras.
- Ensure A/V contractor will provide audio feed for TV and radio media.
- Determine whether media interviews should take place. If so, when and where.
- Press releases should go out one week prior to event.
- Have printed materials available for media.

Event Day - Take a Deep Breath!

When your planning is complete and the event day has arrived, you should:

- Arrive at the venue several hours before the event starts so that you can ensure that the venue is set up properly and that audiovisual equipment is operating.
- Use a checklist to ensure that all tasks are completed.
- Ensure that everyone working the event has an agenda and knows where they need to be and what is going on at all times.
- Use a designated person to handle all questions from media, participants, and volunteers. For large events, you may consider using an information booth.

Make an Action Plan for the Day... and follow it!!

You may feel the need to rush and do everything at once. DON'T!! There's a reason you recruited those volunteers! Delegate where you can, but keep your eyes on the prize. Don't assume things are getting done because you delegated. Follow your Action Plan to the letter so everything is accomplished in the order it should be. You've been planning this for months. No one knows it better than you do. Follow your gut, and please, please, stop to take care of yourself during the day. If you panic, everyone else will!

Evaluating the Event

Knowing if you achieved the goals and objectives that were established for your event is important, especially if you plan to hold the same type of event in the future. There are many ways to evaluate your event efficiently and cost-effectively. Depending on how your planning committee is organized, you may wish to designate one person to coordinate the overall evaluation, with different subcommittees in charge of the actual evaluation tasks. For example, someone from the publicity subcommittee could monitor media coverage, some- one from the logistics subcommittee could track who comes to the event, and someone from the program/agenda

subcommittee could distribute evaluation forms to participants and analyze the results.

By asking some simple questions, you can get a good idea of your event's reach and impact. Here are some ideas for evaluating your event:

- Ask attendees to complete a brief evaluation form at the conclusion of the event. Ask which sessions/activities they found most useful, what they thought of the speaker(s), how they would rate the logistical aspects of the event (e.g., venue, food) and what they would recommend for future events.
- Tally the financial and in-kind contributions to the event that were made by partners, local businesses, etc. This information can be helpful for securing donor funding in the future.
- Track who showed up at your event. In addition to obtaining the number of attendees for the event, also look at who showed up, so that you can see whether you reached your target audience.
- Track how many materials were distributed at the event—both to participants and the media.
- Track media coverage of your event. Scan local newspapers and news websites before and after the event and clip articles about the event. If television or radio reporters cover the event, ask them when they believe that their stories will air. If possible, assign committee members to watch/listen to the coverage and record it.

The most important thing you can do is thank your staff, volunteers, partners, funders and attendees. You can't be successful without them, and they need to leave with a good feeling so they will consider working with you in the future.

You can never thank someone too often!!

Event Planning Tools

The event planning timeline and checklist and partnership planning guide are tools designed to help you stay organized as you plan an exciting and successful event that will raise awareness of the importance of child injury prevention. The activity and event ideas can be used as presented, modified to meet your community's needs, or used to spur the development of new events and activities.

Event Planning Timeline and Checklist

As soon as possible after the first event planning meeting

- Reserve your venue. If your event is likely to draw media attention, be sure to select a venue that includes a quiet place where members of the media can conduct individual interviews with event spokespersons.
- Recruit partners for the event.

6 to 8 weeks before the event

- Recruit speakers—consider local dignitaries, such as the mayor or an alderman, a spokesperson that is well versed and knowledgeable about your programs.

- Request a proclamation from local government officials.
- Order materials, signs, banners, awards, and T-shirts and other giveaway items. (This is one area in which community partners can be handy for providing needed financial support, in-kind services, or giveaways.)

4 to 6 weeks before the event

- Schedule training and preparation for all spokespersons. Have on hand adequate promotional materials.
- Have on hand an adequate supply of informational materials and brochures, as well as other program materials and giveaways.
- Establish a mechanism for reordering materials if more are needed for future events.
- Establish a mechanism to identify potential problems and track the success of the event.
- Update or develop your media list to make sure that you have the correct phone numbers and email addresses for reporters who would be likely to cover your event.
- Identify community calendar contacts for all local media and their deadlines, and distribute your media advisory or calendar announcement.
- Recruit event volunteers, staff, and vendors (such as av techs, a photographer, a caterer, etc).
- Arrange for equipment if it will not be provided by the site. Equipment might include tables, easels for signs, a podium, a stage or riser, microphone(s), and a sound system.
- Create a guest list and invite guests. Assure that invitations have been issued to all involved in putting together the event.

2 to 4 weeks before the event

- Assure that partners are prepared to do their roles.
- Prepare your news release, a backgrounder, a fact sheet, an agenda, etc.
- Conduct more intensive promotion efforts to ensure a good attendance.

1 to 2 weeks before the event

- Send out your media advisory.
- Update your website.
- Send staff and volunteers the event schedule, a list of responsibilities, and directions to the site.
- Provide copies of materials to anyone who will be responding to inquiries before, during or after the event.
- Assist speakers with developing their remarks, if necessary. Gather brief biographies for the moderator to use to introduce speakers.
- Check on the status of materials you ordered and make a checklist of supplies you'll need on site, such as pens, sign-in sheets, business cards, and fact sheets.
- Continue community promotion activities.

1 week before the event

- Confirm space, volunteers, and equipment.
- If you will be photographing, videotaping, or otherwise recording the event, distribute consent forms. (Note: consent forms are not required for news coverage but may be needed for taking and using photographs or recordings of attendees.)
- Follow up with key media to confirm their receipt of the advisory and to encourage them to attend the event.
- Assemble press kits.

1 to 2 days before the event

- Resend the media advisory to your entire media list
- Continue calling your media targets.
- Gather and pack supplies.
- Make arrangement for responding to calls while you and others are at the event. Brief the office staff, update your outgoing voice mail message, and distribute your cell phone number and/or inform office staff as to whether you will check voice mail during the event.

At the event

- Greet media when they arrive and give them a press kit. Ask them to sign in so you can track attendance.
- Greet any special invited guests (“VIPs”) and have someone responsible for showing them to their places.
- Introduce media to your spokespersons for interviews and alert them to photo opportunities.

After the event

- Follow up on any special requests made during the event by the media, speakers, etc. For example, reporters might ask for a bio or “head shot” of a specific speaker or they might ask for data or other information that was not readily accessible.
- Send press kits to journalists who expressed interest but did not attend the event.
- Monitor newspapers, radio, television, and the internet for coverage.
- Obtain contact sheets or prints from photographers and order photos for your internal publications and for your partners or sponsors, speakers, special guests, etc.
- Write an article about the event for your organization and encourage partners and sponsors to do the same.
- Send a letter to the editor of your daily newspaper to thank volunteers publicly for making the event a success and ask the editor to consider it for publication.
- Thank sponsors, partners, and volunteers directly, in-person or preferably with a letter of appreciation.
- Hold a debriefing with all involved to discuss what worked and what didn’t work during event planning, and during the event, and why. Those experiences can be used to plan future events.

Activity and Event Ideas

Potential Organizations to Involve. You may find it possible to do some of these events on your own. Other events will require cooperation and partnerships with local nonprofit, business, and/or governmental organizations. Examples of potential partners among local organizations include:

- Local government and nonprofits such as:
 - State/local health departments or offices on child welfare and safety Agencies of Child and Family Services
 - State/local chapters of professional medical and nursing organizations
 - Community/recreation centers
 - Child care centers
 - Hospitals/clinics
 - Local libraries
 - Community service organizations
 - Youth-serving organizations
- Faith-based organizations
- Area merchants
 - Gyms and community centers

- Restaurants
- Department stores
- Home improvement stores
- Retailers that sell children's products
- Insurance companies
- Coffee shops
- Grocery stores
- Pharmacies
- Local businesses with large numbers of employees
- Local media outlets

Activity Ideas. Activities that all participating organizations may want to consider for promoting and disseminating messages and materials may include:

- Disseminating messages through a newsletter, a website or at organizational meetings.
- Providing fact sheets, displaying posters, and giving out information containing your website.
- Setting up a speakers' bureau with trained speakers who can be featured at organizational and community events.
- Arranging for a speaker to represent issues with media: television, radio, print press; involving political leaders, such as the mayor, city councilmen, county commissioners; and involving local radio or television personality.

Things I wish I had known before I started...

General

- Keep all emails/copies of paperwork for reference.
- If corresponding with a certain person, group, or company often, create a folder in your inbox and set up a filter for their emails - it'll be much easier to track messages than scrolling in your inbox to find some specific one.
- Know where the nearby restrooms are and be able to give clear directions.
- If it isn't an emergency, don't call it one - most service people will find it refreshing and it goes a long way to establishing a good long-term relationship.
 - If you messed up, say so.
 - Find humor in everything that goes wrong or you'll go crazy.
 - Use variety when publicizing your event - send emails, flyers, hang posters, write a press release and anything else you can think of.
 - Remember that it is your responsibility to plan for individuals with disabilities - find out ahead of time if an interpreter or special access accommodations will be necessary.

Budget

- Everything costs money - no really, everything.
- Everything requires paperwork - no really, everything.
- It is worth the trouble to get signature authority on accounts or setting up one 'event account' - it saves time in the long run, especially when you are in a pinch.
- Even before you reserve the room, you need to know the budget - the budget will control everything else.
- It is worth the time to sit down with your boss and ask, "what is the goal of this meeting?" or "what has to happen for you to declare this event a success?" before you even ask the budget.

Room Reservations

- Always check room availability before reserving rooms.

- Reserve your room with a cushion of time around the actual event start time (especially before). If you don't, your event may be delayed because the meeting that is taking place before your event may go longer than it was scheduled to. This is especially important if you have anything to set up - it's awkward to be hanging signs, moving chairs, and putting out materials in front of the participants who have arrived on time.
- If an event is cancelled, notify all affected parties (your room reservation contact, food services, parking, etc) as soon as possible. Don't forget to 'unreserve' your room, in case another event planner is in need of the space.
- Know if the room has wireless internet access available.
- When you are picking a room decide if you want attendees to have wireless internet access - sometimes it is a lifesaver, sometimes it means no one is paying attention to the speaker.

Food Service

- Always have coffee, no matter the time of day or event. Someone always wants a cup of coffee.
- Always have water. You can request pitchers of ice water and cups. This saves on bottled water expense.
- Most people do not eat breakfast. You can usually reduce the amount of food, but always have enough juices and caffeine.
- If on a food budget, host an event not at a normal mealtime. Cookies and Cokes at 3:30 p.m. is a good combo.
- Think veggie friendly.
- Join the 10% Campaign. Buy local!
- Always turn in a catering request 10 business days prior to the event.
- If you have food out in a public area, either a) guard the food from passers-by who think "Ooo, free food!" or b) order way too much food and acknowledge that you have fed the masses.
- Since you can never get attendance numbers perfectly, it is best to go a bit small - catering is prepared for a 5% increase in attendance (in most cases) so it is better to take advantage of that than to waste.

Set-Up

- Have an "event kit" – scissors, tape, safety pins, paperclips, Band-Aids, Tylenol, etc. After a few events you learn what you need.
- Find out who has the space before and see what their setup was. Your Facilities Management bill could be lower if changes were not necessary.

Nametags

- Alphabetize them on the welcome table.
- Have blank nametags and markers for unexpected guests.
- Call before the event to confirm the spelling of names.
- Nametags should be placed on the right shoulder.
- Have a place to discard the backing of stick-on nametags.

Audio/Visual

- Have your own extension cord on hand.
- Unless the meeting is small (20 or less) get a microphone. There are people who cannot speak loudly and there are those who are comfortable with a microphone.
- If you are lucky enough to have an "extra" laptop in your office, keep it for event use. You can remove a lot of the programs and even an older laptop will get some speed back.
- Don't be afraid to ask for computer help if you aren't an expert. Nothing is more tiring for an audience member than to watch staff fumble with laptops and LCD projectors.

Speakers

- Take the time to contact speakers about their needs - do they walk when they present (and therefore need a wireless microphone), do they bring a laptop or do they need one, do they use PowerPoint or do they use something else. If you assume, you will be wrong.
- Although a speaker will rarely use a bottle of water if you put one by the lectern, s/he will be glad you left it.
- You will have to keep the meeting on schedule - use a visual time system (there are plenty of them out

there) for speakers and be ready to give the speaker the hook. It is not being rude - it is respecting the time of the attendees and it is ensuring that each speaker has equal time.

- When developing an agenda, remember to pad. Events start late and speakers run long.

Getting People to the Event

- Provide a cell phone for last minute questions or directions.
- Re-record your office voice mail with pertinent info about your event in progress.
- Leave a copy of all event information with a couple of people in your office who are likely to get calls.
- You cannot over inform regarding events - don't assume they know, because they don't.

This Event Planning Guide was adapted from the 2011 FCS planning Guide, North Carolina Cooperative Extension, Ray, Sarah.

Timeline and Checklist for Event Planning

Four to five months before the event

Activity	Person Responsible	Due Date
Establish planning group and appoint chair		
Initiate event planning and establish responsibilities		
Reserve date on key attendees' calendars		
Determine and reserve venue		
Determine funding and budget sources		

Three to four months before the event

Initiate program discussion		
Determine guest list and create database		
Design hold-the-date cards		
Determine need for memento		
Create invitations / RSVP Obtain approvals (Map, if needed)		
Block hotel rooms for out of town guests		

Two to three months before the event

Confirm speakers and find out about presentation needs		
Develop draft of program		
Contact News Services about internal and external publicity		
Determine precise area at venue for stage and seating		
Determine event signage requirements (pedestrian & vehicle)		
Determine onsite registration procedures including ushers		
Book event with caterer & establish preliminary menu and budget		
Contact local law enforcement for safety and security review		
Contact vendors as required for:		
Tent, stage, podium, chairs, tables,		
Electronics such as sound system, lighting, LCD projector, DVD, laptop		
Flowers, plants, balloons, other decorations		
Memento		
Mail hold-the-date cards		
Begin design of memento		

Six weeks before the event

If alcohol is being served, request necessary campus approvals and NC permits , see <u>Alcohol Policy</u> for necessary forms that must be submitted.		
Place order for invitations and RSVP six to eight weeks prior to the event		
Send invitations		
Order memento		

Four weeks before the event

Approve final program		
Draft script or talking points for speakers		
Work with News Services on copy for internal and external press releases		
Meet with vendors on site		
Consider site preparation (special cleaning, equipment and trash removal) (Contact Facilities Operations for assistance)		
Arrange for photographer		
Prepare event signage		

Two weeks before the event

Review planning group and staffing assignments for day of event		
Meet on site with operational staff such as transportation officials and ushers to discuss responsibilities		
Meet with caterer on site to discuss setup and final menu		

One week before the event

Send caterer final count		
Print programs, name badges, and seating cards for VIPs		
Confirm arrangements with vendors		

24 Hours before the event

Contact caterer to verify all arrangements		
Confirm security requirements		
Ensure tent, chairs, tables, stage, podium are in place		

Day of the event

Check location setup to include chairs, tables, podium, food		
Arrange printed material, nametags, mementos etc. on registration table		
Check sound and lighting equipment with vendor(s)		
Ensure space and hook-ups are available for media		
Ensure decorations are in place		
Place water at podium		

One to five days after the event

Write thank you notes to speakers, volunteers, staff and others as appropriate		
Complete written evaluation of the event with suggestions for future events		
Coordinate event story and photographs with News Services		