EVENT PLANNING

Presented by Judy Hills

- President of Friends of the North Carolina Public Libraries

- VP of Friends of the New Bern-Craven County Public Library

- Maintains two nonprofit websites

- Editor of four monthly newsletters and one bi-monthly newsletter

- Former college adjunct faculty—taught business education

- Taught grant writing, grant management, and other nonprofit courses

- Former Executive Director of a quasi-governmental regional organization that provides planning, aging program oversight, and other services to nine counties and 62 municipalities in central eastern North Carolina

- Contact info: jahnbnc@gmail.com

Event type

This presentation is intended to help Friends plan events other than a book sale. Examples of other types of events include:

- Small workshop

- Annual meeting

- Informational

- Educational

- Fundraiser

- Grand Opening/Special Event

- Party or Gala or Celebration

General considerations

- The larger or more complex the event, the more time is needed to organize
  - 6 months or more for big events (galas, major fundraisers)
  - 4 to 6 months for moderate sized events

- Scale this list according to the complexity of your event

- This presentation is for an in-person event.   Some elements will work for online events as well.

- If this event is not already in your organization's plan of work and budget, get proper approvals

- Need a chair or organizer and a committee

- Establish event goals and objectives—what do you hope to accomplish

- Select date—check for community conflicts/holidays/other events

- Determine attendees and estimate attendance--will drive the selection of the venue

- Determine type of event--will drive the selection of the venue as well

- Determine if event will have financial sponsorships and assign levels

General Considerations (cont'd)

- Identify venue and negotiate the details
  - Space needed?
  - Insurance needed?
  - Alcohol?
  - Equipment provided by venue?
  - Furnishings provided by the venue?
  - Approved vendors (caterers)?
  - Contract?

- Establish Budget: Cost estimates—provide details and overestimate the cost slightly
  - Facility/room rental
  - Food & beverages
  - Equipment/furnishings
  - Speaker fees/honorarium & travel costs (food, lodging, travel)
  - Event insurance
  - Advertising/publicizing/printing
  - SWAG (stuff we all get—inexpensive giveaways)
  - Signage
  - Miscellaneous (door prizes, tickets, name tags, handouts, photographer)

General Considerations (cont'd)

- Work with your Treasurer (handling income and disbursals, credit card payments)

- Identify and confirm potential partners/collaborators

- Identify and confirm speakers/presenters/entertainers
  - Have an alternate plan for last-minute cancellations

- Determine if you need event registration software

- Brand the event
  - Build a website page or Facebook page
  - Develop an event logo and tagline

- Create publicity plan

- If open to the public:
  - Create and distribute flyers
  - Notify media: Create and send press releases
  - Post to online calendars
  - Use social media messaging
  - Arrange for sale of tickets

3 to 4 months ahead of the event

- Speaker/presenter/entertainer:
  - Finalize expectations
  - Get bio info and photo
  - Make travel and accommodation arrangements
  - If appropriate, have contracts or agreements signed
  - Ask speaker/presenter/entertainer to help promote the event and share with their network
  - Finalize details on payment

- Finance
  - Determine registration/ticket fees
  - Set up and enable the registration
    - Online or other
  - Solidify sponsorships and collect money
  - Create a spreadsheet to track all income and expenses for this event separately

3 to 4 months ahead of the event

- Venue and logistics--Finalize details with venue or vendors
  - Meals/food
  - A/V equipment
  - Room diagrams
  - Furnishings/linens/water
  - Registration area
  - Parking
  - Signage
  - Security
  - Permits/licenses/insurance
  - Accessibility issues
  - Communication before and during the event

3 to 4 months ahead of the event

- Finalize and implement the publicity plan
  - Develop a draft of the program
  - Develop a draft script (MC, speaker introductions, housekeeping issues, thanks, closing remarks)
  - Develop publicity pieces & timeframe for releases
    - Newsletter articles
    - Ads
    - Flyers
    - Radio spots
    - Print posts
  - Create an event page on your website
  - Create and release an email teaser
  - Create a Facebook event page
  - Develop a promo video and post on your YouTube and your Facebook page
  - List your event on community calendars
  - Create a social media buzz
 - Order SWAG, name tags, awards, etc.

1 to 2 months prior to the event

- Send reminders to your contact list regarding registration and participation

- Reach out to speakers/presenters/entertainers
  - Confirm date and time
  - Confirm any travel arrangements/accommodations
  - Confirm any equipment they are to provide (e.g., laptop to show a PPT)
  - Secure any missing bios/photos
  - Request electronic copy of speeches/presentations—confirm any planned use post-event

- Finalize sponsorships
  - Confirm and collect what's due
  - Get any promotional materials to be shared during the event
  - Ask sponsors to share the event via their promotional channels

- Continue to execute the publicity plan

- Close any early-bird ticket prices—release standard pricing

- Finalize and proofread materials, get printed

- Secure a photographer (paid or volunteer)

1 week prior to event

- Committee should meet
    - Review status
    - Ensure back-up plans are in place
    - Ensure needed volunteers have been secured
    - Attend to any last minute snags

- Finalize event script

- Brief volunteers about their event duties and timelines

- Finalize your seating and room plans

- Provide final numbers to caterer

- Print any handouts, programs and evaluations
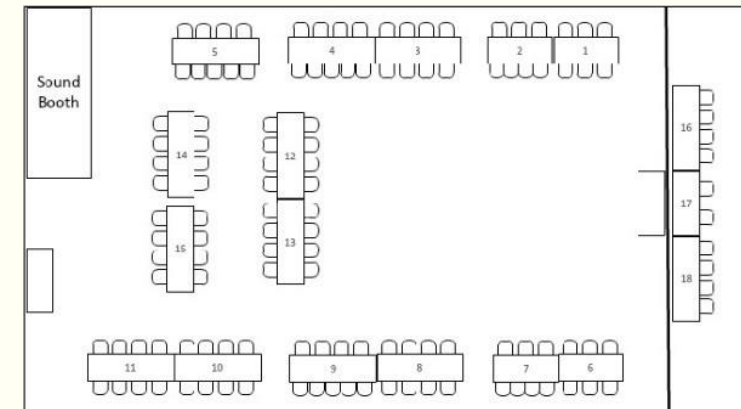
1 week prior to event

- Do a final reservation check and print name badges

- Determine photo op and interview opportunities with any presenters and VIPs

- Confirm details with media attendees (if invited)

1 Day before the event

- Confirm media coverage

- Ensure all signage is in place (inside and outside)

- Ensure there are adequate outlets for presenters (may need power strips, cords)

- Ensure registration table is ready and stocked
  - Blank registration forms, roster of attendees, volunteer checklist and sign-in form, evaluation forms, blank name badges, markers, pens, paper, tape, stapler, SWAG, programs/agendas, set up a lost & found, set up a message center

- Ensure all gifts, plaques, awards, trophies, speaker gifts, etc. are on-site

- Ensure all A/V equipment is set up and working properly

- Ensure scripts are ready at each podium

- Take a deep breath!

Day of Event

- You got this!   Arrive early

- Bring copies of script, instructions, directions, contracts, contact information, keys, needed parking permits, seating charts, guest list, walkie-talkies (Zello app)

- Check in with team—make sure registration desk is manned and ready

- Assist as needed

- Wander around and greet attendees

- Handle any issues that come up during the event

- End of day: collect equipment, signs, left over materials, etc.

Post-event follow-up

- Check in with venue—ensure nothing was left behind
- Analyze any attendee evaluation forms used
- Financial status
    - Check with Treasurer regarding any outstanding income/expenses
    - Turn in any receipts, payment for late registrations, donations
    - Provide final registration list
    - Receive and analyze the final financial report vis-à-vis the planned budget
- Collect comments and observations from team (meeting or email)
- Draft a final report that includes:
    - What worked and what didn't
    - What could be done better if this event is run again in the future
    - Actual vs. budget analysis
    - Recommendations

Post-event follow-up (Cont'd)

- Thank-you's and acknowledgement letters to:
  - Sponsors
  - Collaborating organizations
  - Volunteers
  - Speakers/Presenters
  - Donors
  - The media
- Notes and letters should include:
  - Reminder of the success of the event
  - How they contributed to the success
    - Amount raised
    - Increased awareness
    - Number of participants
    - Quotes from attendees

Post-event follow-up (Cont'd)

- Get event photos/videos from photographer and others
- Post Event publicity
  - Email to your members and contact base with highlights from event
  - Make a short video and post it on social media
  - Write up the event in your next newsletter and include photos
  - Update event page on your website and your Facebook page to reflect that the event was held
- Tie up any loose ends
- Hold a celebration event with your team.

Resources

- Event Planning checklist (basis for this PPT)
  [Click here](#)
- Announcing an event
  https://sendpulse.com/support/glossary/event-announcement
- Announcing an event on social media
  https://community.brownpapertickets.com/wp/announcing-events/
- Examples of an email invitation
  https://www.eventbrite.com/blog/event-email-examples-ds00/
- How to design an event flyer
  https://www.eventbrite.com/blog/how-to-design-an-event-flyer-ds00/
  https://publicwritingguide.weebly.com/event-flyer.html
- Event registration software—comparison of 8 providers
  https://whova.com/blog/event-registration-software-price-comparison/
- Virtual Event Checklist
  [Click here](#)

"TO ACHIEVE GREAT THINGS, TWO THINGS ARE NEEDED:
A PLAN AND NOT QUITE ENOUGH TIME."

LEONARD BERNSTEIN