

Plan Events & Keep Your Sanity

**Kathy Wilson
Teri Rollman**

Number 1 Given:

No matter how much you plan, something(s) will always happen to throw a spanner in the works.

Number 2 Given:

All parts of an event are intertwined, like a pile of paper clips. This is as it should be, so don't fight it.

Number 3 Given:

Event Planning is all about coordination and communication.

Number 1 Rule:

Take care of yourself. If you're a wreck

- things will fall apart**
- you won't be able to make good decisions**
- mistakes will be made**
- you won't inspire confidence**

Additional Rules:

- 1. Love your lists.
Make them.
Check them constantly.
Adjust them as needed.**
- 2. Stay focused.**
- 3. Love your timeline.
Make one at the beginning.
Check it constantly.
Adjust it as needed.**
- 4. If it's not a tiny event and you're doing it by yourself, get help if you can, from staff or friends; or band together with another agency and do it together. Find community partners.**
- 5. If you plan to work with a group:
Get can-do people
Trust them
Delegate
Follow up, check, follow up, check, assist, check**

6. Corollaries to #5:

Sometimes helpers turn out to be not so helpful, so tactfully reassign, get them some help, etc.

Remember that things happen to people – moving, marriage, birth, illness, etc. Have a Plan B.

Remember that things in general happen – earthquakes, power outages, etc. Be ready to come up with a Plan B.

7. Listen.

You might be in charge, but others have great ideas, too. Usually better.

8. Write everything down.

9. Thank everyone.

Again and again and again.

Parts

1. The Team

It might be just you. It might be a bunch of you. If you can, gather a good, can-do team to steer the event, large enough to take care of the work, small enough to be nimble and able to make decisions.

A steering team has a chair, a secretary, a treasurer, and a representative/chair of each subcommittee, if the event is large. There can be plenty of other helpers, but the steering team needs to be the decision-making group.

Subcommittees represented on the steering team could (but don't have to) include:

- Food & Beverage
- Entertainment/Activities/Music
- Marketing/Publicity/Photography-Videography
- Vendors
- Funding (grants, etc.)
- Registration
- Sponsorships
- Speakers/Dignitaries
- Site
- Operations (this list of duties can be huge and might be split)
- Gate/tickets/money intake

Audio-Visual and other supplies
Volunteer or other help
Set-up team
Clean-up team
Decorations
Accommodations

2. The First Meeting

- Determine major player team responsibilities:
 - Chair (probably you)
 - a. Coordinate all subcommittees
 - b. Negotiate and sign all contracts
 - c. Monitor budget
 - d. Monitor timeline
 - e. Permits, insurance, licensing
 - e. Monitor everything else
 - Recording secretary (remember communication?)
 - a. take accurate minutes with action items
 - b. distribute minutes to each steering team member
 - c. keep track of team member info (phone, address, etc.)
 - d. handle correspondence
 - Treasurer
 - a. help develop & monitor budget
 - b. pay bills

- Determine the purpose/goal/intention of the event, e.g. why are you having it?
 - Thanks/Recognition
 - Celebration
 - Raise Funds
 - Raise Awareness
 - Teach
 - Announce
 - Perform
 - Other

- Think of the mission/purpose of your organization as you plan.

- Visualize the event – what does it look like in everyone’s heads?

- Determine the target audience:
 - Number of people
 - Ages

Other aspects of the target group that are relevant

-Date, budget, site – these are married to each other.

a. Date

Determine best time of year

Check, check, check for conflicts

Consider holidays, vacations, religious observations

Think about long weekends

Think about what's going on in YOUR agency

Consider huge sports or other events

(How do you find out? Check the papers, local listings, the Internet, community bulletin boards, Chambers of Commerce - everything that you can think of.)

b. Location

Indoors? Outdoors?

Restaurant? Hall? Conference Center?

Your meeting room?

Remember, this is married to the date – and the budget. If you come up with a date, the location had better be available, and for a price you can afford.

c. Budget

How much do you have?

Where is it coming from?

Are there strings attached?

How will you get \$ if you don't have \$? (This may lead to other events, to raise money for an event!)

Grants? Is there time to write and manage grants?

d. One other possible marriage partner here is speaker availability. If you want/need a national one, you'd better plan a year or more out to get on their calendar. Ditto if you have your heart set on a particular entertainer.

Assign people to bring back all possibilities of info so you can make decisions at your next meeting – which you will always set at the end of each current meeting. Develop a regular meeting schedule so everyone has all meetings on their calendars.

2. The second meeting

- Reports from everyone
- Determine your final date and location
- Discuss theme – remember your purpose and mission
- Develop timeline
 - a. Work backward from the date of the event and put in everything that you think needs to happen and when – and build in buffer time
 - b. Monitor this and change as needed – it can be flexible

3. From then on:

Keep in contact with everyone via regular meeting schedule. Every steering team meeting should have:

- Budget report
- Subcommittee reports
- Timeline report

You'll find it necessary, the larger the event, to have much more frequent contact with various people on the steering team.

You'll also find that if you have the timeline in place, it's a blueprint for the event and will help shape your meetings.

If you're going solo, just check your lists all the time! Stay focused!

Other notes:

Budget

Write everything down the first time you meet (or when you're sitting around in your jammies thinking up your solo event.) Make a wish list. Then highlight what you HAVE to have. Then figure out how you're going to pay for it and perhaps you can add in some of the extras.

Script

This is closely related to the timeline and can in fact be the same, only with more detail. This will state who is doing what and by when. Very essential. This should be updated and checked every time you meet with your steering team. If your event is huge and you have subcommittees, their chairs should have their own scripts for their teams' assignments, too.

Site/location considerations – for starters

- Access time
- Time built in to set-up/clean up
- Who cleans what?
- Legal room capacities
- Zoning
- Bathrooms (at least 1 for each 75 people)
- Parking
- Traffic flow
- Insurance
- Permits
- Restrictions (historical buildings, divots in the grass, etc.)
- Sightlines for speakers
- Kitchen facilities (certified if you're going to do anything but stage catering)
- Fire and safety regulations (inspections needed before event?)
- Tents/anchors (there's always wind)
- Contracts
- Street permits
- Signage
- Staff/volunteer entrance/break area
- AV equipment provided? Tech help?
- Arrival area – coat check – weatherproof?
- Accessibility

Operations (closely related to Site)

- Power
- Toilets (portapotties?) and handwashing
- Trash
- Tables
- Chairs
- Tents and anchors
- Dance floors
- Traffic patterns in and around site
- Music tech
- Parking (plus help, signs, drop-off, shuttle, etc.)
- Signage
- Emergency plans
- First aid and/or medical personnel/staffed first aid stations
- Insurance
- Permits
- Lighting
- Stages
- Audio
- Security/Police

Food & Beverage

Permits/licenses

Catering help (age of help if alcohol served)

Where dress/what to wear/where to take breaks/how many needed

Staging area

Certified kitchen if cooking

Type of menu

Age – kids won't eat escargot

Sex – ladies like salads – and chocolate!

Time of year – who needs beef stew when it's 95 degrees?

Type of event

Cultural or other preferences

Have a master Contact Sheet for all contracted help, permit people, licensing people, tech help, all committee members, security, etc.

Remember:

Plan meticulously

Be prepared for anything

Be flexible

Make lists

Check them

Keep focused

Thank people (Really, do this, in person, all the time, and after an event.

You'd be astounded at how thrilled people are to get a personal thank-you note for their help.)

And have fun!