Nuts & Bolts of Event Planning: Concept Development to Implementation

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Workshop Outline

- Event Planner Skills
- Pre-planning – The 5 “W’s”
- Planning Basics
  - Planning Worksheet
  - Timeline
  - Budget
  - Venue Selection
  - Volunteers
  - Contingency/Liability
- Making the Event an “Experience”
- Publicizing and Marketing the Event
- Evaluating the Event
Event Planner Skills

- Organized
- Multi-task
- Communicate
  - Oral
  - Written
- Interpersonal skills
- Negotiate well
- Budget
- Flexible
- Sense of humor
Pre–Event Planning

- Complete a Needs Assessment
  - Who
  - What
  - Where
  - When
  - Why (most important)
5 W’s: Why, Who, What, When and Where

**Why**: Identify the Purpose of the event, and the goals and objectives

- Fundraiser
- Recognition Event
- Speaker
- Celebration
- Media Opportunity
5 W’s: Why, Who, What, When and Where

Who: Identify attendees, demographics and numbers
5 W’s: Who, What, When, Where, and Why

What: What type of event will you create? Identify the activities, formats and resources.
5 W’s: Who, What, When, Where, and Why

When: Determine date and times of the event; the duration and schedule
$5 \text{ W’s}$: Who, What, When, Where, and Why

Where: Identify the location, logistics and spatial dimensions
The Planning Basics

- Planning Worksheet
- Timeline
- Budget
- Venue Selection
- Volunteers
- Contingency/Liability
Planning Worksheet

Categories to Include:

- Define goal/purpose of event
- Determine budget
- Invitation/printed program
- Mailing list
- Track RSVPs
- Revenue collection
- Catering
- Rentals

- Audio / Visual
- Volunteer recruitment
- Floral and décor
- Entertainment and speakers
- Event program and scripting
- Parking
- Signage
- Certificate of insurance
In conjunction with assigning organizational tasks it is important to assign timelines for completion but also to be aware of the lead time required to complete certain tasks.
Sample Timeline

6–12 months before
- Select venue
- Invite speakers and key guests

3 months before
- Coordinate vendors and equipment rental
- Develop printed materials

6–8 weeks before
- Mail announcements/invitations
- Create room diagrams
- Order favors
Sample Timeline

3 weeks before
- Begin calling attendees

2 weeks before
- Review deposits
- Order printed materials

1 week before
- Confirm headcount
- Name tags (if using)
- Distribute briefing materials
  - Top administrators
  - Speakers / honorees / key guests
Sample Timeline

Day of event
- Arrive early
- Connect with venue liaison, vendors, etc...
- Bring event toolbox
- Bring extra copies of scripts, timelines, factsheets, guest lists, table diagrams etc
- Set-up registration / check-in
- Placement of event program, menu cards, favors

Post event
- Debrief with key stakeholders
- Document notes for next event
Budget Planning Checklist

Key *Expense* Categories to Include:

- Venue
- Food & Beverage
- Rentals
- Décor
- Design & Printing
- Postage & Shipping
- Entertainment

- Awards
- Transportation
- Publicity
- Audio Visual
- Office Expenses
- Miscellaneous
Budget Planning Checklist

- Key *Revenue* Categories to Include:
  - Registration Fees
  - Tribute Ads
  - Donations
  - Fundraising events
    - Contact Ira Unterman in University Advancement Operations for policies about revenue collection
  - Non-fundraising events
    - Contact the accounting department for updated policies about revenue collection
Selecting Your Venue

Key Considerations:

- Availability
- Capacity
- What’s included?
  - Tables and chairs
  - Tableware and flatware
- Catering costs
  - Food & Beverage minimum
Selecting Your Venue

- **On-campus**
  - Titan Student Union
  - Golleher Alumni House
  - Arboretum
  - Mihaylo College of Business
  - Athletic venues and fields
  - Quad
  - Library
  - What else?

- **Off-campus**
  - Hotels
  - Restaurants
  - Golf Course
  - Community Centers
Room Layouts

Half-Rounds & Rounds

Pros
- Ample workspace
- Good local interaction
- Good food & Beverage set

Cons
- Poor full-room interaction
- Sound bleed from tables nearby
Room Layouts

Hollow Rectangle & Square

Pros
- Variety of arrangements possible
- Good working atmosphere

Cons
- Consider 16” workspace per person
- Extensive skirting may be needed
Room Layouts

Classroom Style

Pros
- Presenters can see participants
- Accommodates large groups in small space

Cons
- Minimal interaction possible
- Participants only see each other’s backs
Room Layouts

T-Shape

- **Pros**
  - Good for small groups
  - Good interaction potential

- **Cons**
  - Larger group size means poor sightlines and back views
Room Layouts

Theater

Pros
- Good for large groups when writing not required
- Presenter can see participants

Cons
- No writing surface
- Minimal group interaction
Room Layouts

U–Shape

- **Pros**
  - Good workspace
  - Good interaction potential

- **Cons**
  - Not ideal for larger groups
  - Rear row far from A/V
Volunteer Management

- **Recruitment**
  - Identify your needs
  - Recruit more volunteers than needed

- **Training**
  - Assignments clear and meaningful
  - Volunteers trained in advance if complicated duties and refresher on-site
Volunteer Management

- *Respect for their time*
  - Don’t expect them to work too many hours
  - Make sure they have work
  - Feed the volunteers if they work during a mealtime

- *Recognition*
  - At event and afterwards
Contingency Planning

- Inclement weather
- Natural disaster
- Missing volunteers
- Vendors not showing up on time, etc.
- Cancellation of speaker/entertainer
- Crowd control
Liability

- Risk management
- Certificate of insurance
- Proper permits
- Licensing
- Fire Marshall
Making the Event an “Experience”

- There are so many competing things to do during one’s free time, particularly in California. There are also many charities that are “competing” for support. How do you make your event a memorable experience?
Making the Event an “Experience”

- **Theme** – Determine one key theme that weaves through all elements of the event such as marketing materials, event décor, awards, entertainment, food, etc.

- **Uniqueness** – What is special about your organization that can be reflected in what you do?

- **Accessibility** – Access to something that is typically inaccessible – it could be a place that someone can’t go or the opportunity to meet a person that one normally couldn’t meet.
Publicity & Marketing

- Understanding your audience
  - Demographics
    - Age, Gender, Generation
    - Diversity
    - Cultural aspects

- Customer Segmentation
  - Definition: the practice of dividing a customer base into groups of individuals that are similar in specific ways relevant to marketing
    - Income level
    - Geographic area
Considerations

- Formal or themed event
  - Save the date
  - Send out early if special attire needed

- Informal event
  - Postcard vs. flyer
  - E-vite (online)

- Sporting event (i.e. Golf Tournament)
  - Allow longer time for registration to accommodate creation of teams and week day scheduling
Invitations

- RSVP Mechanisms
  - RSVP card
  - Online order form (contact Strategic Communications)
  - Phone
  - Email
Attracting Your Audience

Media

- Free media
  - Community newspapers, calendar section
- Earned media (Public Affairs)
  - Press releases
- Paid media
  - Print – Local vs. Regional
  - Radio – Public vs. Commercial
  - TV – Public, cable and network
Evaluating the Event

- The bottom line
- Participation levels
- Was the experience memorable?
- Were your guests/volunteers satisfied?
- Ancillary benefits
Tools for Analysis

- Budget reconciliation
- Debriefing meetings
- Debriefing surveys
- Marketing analysis
Helpful Tips & Resources

- Event Toolbox
- Event Folder
- International Special Event Society (ISES)
- Network of on-campus event planners
- Ext. Ed. Professional Meeting and Event Planners certificate program
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Questions?