

Event Planning Guidebook

Executing an Exceptional Event

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Basic Framework of an Event

Define Goals and Objectives - The Why

Goals and objectives are the heart of your event. Though the beginning goals and objectives may be broad, it's important to continue to review and revise them as the event evolves to ensure your plans are aligned with your original intent and remind yourself why you started planning the event.

- I. Target Audience
 - A. Who is the promotion targeted at?
 - B. What will interest them?
- II. Message
 - A. What do you want to say to the audience?
 - B. What do they need to know or do?
- III. Objective
 - A. What do you intend to achieve through the event?
 1. Increase awareness, educate, or inform
 2. Hit a specific registration target
- IV. Tier I events: how does the event support the college's strategic plan?

Establish a Budget

To ensure fiscal responsibility, establishing a budget in the beginning is an essential aspect that will help aid in clarifying other aspects as details develop. Developing a plan for where funds will come from and who will manage what aspects of it are critical to the overall event plan.

- I. Where will the funds come from?
 - A. Internal departments
 - B. Sponsorship
 - C. Ticket Sales
- II. Who is responsible for managing and approving the budget?
- III. Where should you expect the funds to be dispersed to?
 - A. Marketing and promotion
 - B. Guest speakers/performers
 - C. Printed material
 - D. Food service
 - E. Venue logistics (decor, rental equipment, staffing)

Build Your Team and Assign Responsibilities

Depending upon the event you may be managing it solo or a team may be necessary to support the planning. Teams vary in size but it's important to develop and assign roles and responsibilities early to ensure accountability and keep your event on track. Below are examples of possible team structure that can be used and/or redeveloped to suit your needs.

- I. Project Manager/Event Lead
 - A. Oversees the entirety of the event
 - B. Manages and approves budget and purchasing
 - C. Steers the event
- II. Site Lead/Event Coordinator
 - A. Manages all of the ground level aspects
 1. The main contact with the Event Services Office
 2. Manages the event staffing
 3. On-site lead - knows all the people, where the food needs to go, and where the outlets are
- III. Program Lead
 - A. Develops the agenda
 - B. Works with the guest speaker/performer
 - C. This person knows the when and where everything will occur
- IV. Design and Marketing Lead
 - A. Develops draft maps, signage, web design
 - B. Proposes plan for marketing, registration, follow-up
 - C. Heavily collaborates with the Marketing Department
 - D. This person loves collaborating and measuring performance data
- V. Registration and Check-in
 - A. Develops plan for registration with design and marketing lead
 - B. Manages rsvp counts and communicates info
 - C. Manages team(s) needed for on-site check-in, layout, name badges, etc. needed day-of
- VI. Exhibitor Lead
 - A. Manages calls for exhibitors and/or vendors
 - B. Develops the layout
 - C. Ensures all exhibitors follow college policy, procedures, and regulations
 - D. Consider developing an exhibitor toolkit (a template is included)
 - E. On-site coordinator for exhibitors
- VII. Staff Support Lead
 - A. Manages the overall event staffing/volunteers
 1. Ensures all parties have a lead point of contact
 - B. Manages training and communications with event staffing/volunteers

Develop Event Branding, if Appropriate

An event brand helps set the tone of your event. For tier I events, if considering branding your event you will work closely with the Marketing Department.

- I. Naming the event
 - A. The event name is the first thing attendees will see so it's important to make sure it clearly defines the events intent or catches attention
- II. Theme
 - A. A theme may be appropriate to tie the event together or create a fun aspect.
- III. Logos/colors/typography
 - A. It's important to make sure you're consistent in all communications and materials
 1. Consider this in signage, emails, decor

Plan the Program

Setting your agenda as early as possible is crucial in steering your event and ensuring necessary steps are taken to make your plan happen. Having a basic agenda early helps:

- I. Sell exhibitors and potential sponsors on the event
- II. Give you a framework for using in early marketing campaigns
- III. Provides a starting point for further development
- IV. Typically required before...

Reserving the Site/Location/Date/Time:

The Event Services Office is the primary resource for event planning at the College. They will coordinate the logistics of your event for you and ensure your event plans align with college policy, procedure, and regulation.

- I. Contact the Event Services Office to start the reservation process at eventscheduling@kvcc.edu or by calling the Facility & Event Services Office at 269-488-4540.
- II. It is necessary to keep in contact with the Event Services Office as event plans develop to ensure continued event approval and coordination of logistics.

Determine the Tools

The tools of the trade can make or break an event. It's important to identify what tools your team will use to communicate and how your attendees will want to engage in your event.

- I. What tools will you use for registration?
- II. How will your team communicate? Spreadsheet, email, meetings?
- III. How often will you communicate?

- IV. How will your audience want to engage with the event? Event app, Instagram, Pinterest, in-person?

Confirm Sponsors, Exhibitors, and Speakers

Sponsors and exhibitors can be a great way to offset costs of your event and provide added impact for your attendees. Additionally, speakers can provide a powerful impact to your event. Adding these aspects to your event will require advanced planning and coordination.

- I. Sponsors
 - A. Tier I users will need to collaborate with the Director of Development
 - B. Make sure to approach potential sponsors early with a strong event proposals and be sure to listen first to what your sponsor is interested in gaining from collaborating
- II. Exhibitors
 - A. Determine method for call for exhibitors
 1. Tier I users will need to collaborate with the Director of Development
 2. Develop an exhibitor toolkit
- III. Speakers
 - A. Provide speaker with details and guidelines on the specifics of their session
 - B. Gather headshot and bio to include in program
 - C. Gather details on any contractual requirements and confer with the Event Services Office to ensure capability to accommodate
 - D. Book travel, accomodations, transportation, meals, and/or tours

Create Marketing and Promotional Plan

How are you planning to get your audience to the event? Knowing your goals when developing your marketing plan will guarantee you meet them.

- I. Set targets and milestones for your goals including registration numbers, follower goals, and social network shares
- II. Is a hashtag a valuable addition to your marketing?
- III. Will you need photography or videography during the event?
- IV. Is live broadcasting an option?
- V. Will a press release be sent out before the event?

Define Measurements

Return to your defined goals and objectives. What were they? Now, how will you identify if you achieved them?

- I. Data and analytics
 - A. What data will you use to identify a quantitative return on the event?
 1. Registration numbers?

- 2. Online engagement?
 - B. What information will you use and how will you capture the data?
- II. Qualitative return - it's all about the experience
 - A. A survey can be a powerful tool to tell you if your attendees were satisfied and in what areas you can improve

Timeline and Checklist for Event Planning

It's best to start planning any event as soon as possible. Smaller events will require less lead time to plan; however, larger events can benefit from 12 months or more planning depending upon the aspects you want to include. This timeline and checklist are based on a mid level event and can be adjusted to suit your specific event. It by no means is a comprehensive listing of activities. If you need assistance determining best timeline for your event please contact the Event Services Office at eventscheduling@kvcc.edu or call the Facility and Event Services office at 269-488-4540

Six to Twelve Months Before the Event

Activity	Detail
Start the basic framework of the event	Primarily defining goals and objectives, building your team, and assigning responsibilities
Establish a standard meeting pattern for full planning team	Provides a forum for updates. Many aspects being worked on by one team will impact others and it's important to stay on the same track
Determine method of communication or information sharing	How will your team share documentation or status updates? If you plan to meet less frequently sharing updates in a shared file or online platform will help you stay up to date with each other
Start work on funding and budget sources	The funds you have to utilize will affect all areas of your planning so make this step a priority at the start. Develop contingency plans, if need be, for if you do not meet your budget estimate...what plans would you change?
Begin developing your guest list	6 months mas. (typically 2 - 3 months in advance): consider sending a save the dates

	if your attendees will need to travel to attend. If so, consider also blocking hotel rooms at a block rate
Begin scouting your venue	Make contact with sites and if possible, hold space tentatively as you finalize plans and get a contractual agreement in place

Three to Six Months Before the Event

Activity	Detail
Secure your venue	At this point you should have finalized your site and have a contractual agreement in place
Secure your guest speaker and plans	Reserve date on speaker's calendar, block hotel room, coordinate travel, confirm speaker needs and process contractual agreement
Draft the program agenda	Your agenda should be fairly set. Only minor changes should occur after this point
Plan a site visit	Visit the site and meet with the events team

Two to Three Months Before the Event

Activity	Detail
Prepare your materials	Include developing the invitation, maps, program, and signage
Determine on-site registration procedures	How and where will this occur? Who will assist? Who will prepare packets or name badges?
Book the caterer	Get the initial catering order placed, establishing the menu. Make sure to consider how you will provide for dietary restrictions and manage traffic flow

Book transportation services	If you will need to facilitate transportation for attendees now is the time to secure. Remember to include this aspect in your communications!
Secure your vendors	Do you need to rent equipment in addition to what your site has available? If so, get those items secured now. Examples would be tents, staging, sound equipment, lighting
Send save the date	Now is the time if you have not already sent them

Six Weeks Before the Event

Activity	Detail
Review the details	Review all contracts to ensure all are in order
Confirm calendars	Make sure everyone has the date held as well as any rehearsal, setup, or cleanup time, confirming your speaker's calendar also
Send the invitation	Send the invitation and be ready to receive responses

Four Weeks Before the Event

Activity	Detail
Ramp up your publicity	Work with your marketing team on internal and external communications and publicity. It's time to get the word out and ramp up interest
Finalize the program	The program should be finalized and approved. Changes after this point may not make it into printed materials.
Draft script(s) and talking points	Start developing the script and provide them to your speakers for review

Meet with vendors on-site, if needed	It's time to look at the space and confirm that your theoretical plans fit the needs of your vendors
Finalize all materials	Get your documents to the printer. Minimize changes to your webpage

One - Two Weeks Before the Event

Activity	Detail
Review and confirm your staffing plan	Review your plan, meet with staff and volunteers on-site, if needed, to go over plans and responsibilities
Review your registration	Review registration counts and make any updates to caterers, vendors, etc. as needed
Print materials	Print your materials and get them on-site if possible. This may include name tags, programs, and signage
Do a check-in with the site's event team	This is your opportunity to check over the details before things get too busy
Do final confirmation with all vendors	Last chance to confirm the details. Confirm contractual agreements one last time

24 Hours Before the Event

Activity	Detail
Contact caterer	Confirm logistics (arrival time, handling of dietary restrictions, etc.)
Do site walk-through and load-in (if possible)	Walk-through of site reviewing setups, signage, and AV equipment.

Day of the Event

Activity	Detail
Arrive early and complete setup	Do final load-in and complete setting up and arranging equipment and materials
Exhibitor and presenter touch-base	If you have speakers, presenters, or exhibitors at your event you will need to check-in with each ensuring that they know where to go, have all they need, and their AV and IT needs are met.
It's all in the details	Set water at the podium and any gifts or other items out for your guest speaker and/or exhibitors
Stay calm and remain flexible	Be prepared to pivot when you need to. Most changes made on the fly will go unnoticed by attendees so just remember to remain calm, flexible, and enjoy what you've planned so hard to create!

One - Five Days After the Event

Activity	Detail
Share your gratitude	Send thank you correspondence to your guest speakers, volunteers, educators, exhibitors, and others as appropriate
Post-event write up	Compile a written evaluation of the event with feedback and considerations for future
Market	Marketing does not stop when the event ends. Compile event images and story for a post-event and future event communication. If your event is annual you could use this opportunity to solicit early bird registration at a discounted cost.
Solicit feedback and thank attendees	Soliciting feedback from an attendee survey

	will help you to understand how successful your event was and where you can improve. Remember to thank attendees.
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Contingency Planning

The key to a successful event is planning for what should and also could happen. While planning for what should happen is the core of your planning it's imperative that you also consider what could happen and document how you will respond if so. Creating contingency plans will minimize stress and the risk of attendees recognizing something has gone wrong during your event.

Preparing for Challenges that May Arise

Below you will find some common challenges or problems that could arise during your event, things to consider, and options for contingency planning. These are by far not all things that could occur but will hopefully get you into the mindset of contingency planning.

Challenges/Problems	Considerations and Contingency Planning
Microphone not functioning	Consider first: check wires, batteries, and outlet for power Contingency: <ul style="list-style-type: none"> ● Have a backup sound system ready ● Have AV support on-site ● Be prepared with the call line for maintenance
Presenter's flash drive not working	Consider first: is it inserted properly, if using a laptop through media cart is the laptop button selected Contingency: <ul style="list-style-type: none"> ● Plan to have the presenter email you a copy of the presentation in advance and verify it's function prior to ● Ask the presenter to save the presentation on their laptop as a backup to the flash drive
Inclement weather (winter storm)	Consider first: If the event will require travel is this the best time for the event? Contingency:

	<ul style="list-style-type: none"> ● Have the call line for Grounds dept. ● If travel, how will you manage late attendees...float staff at registration? ● What will you do if your keynote is delayed? Will you plan for an on-site alternate or do a live zoom presentation with keynote?
Inclement weather (outdoor event)	<p>Consider first: is this the best location for my event?</p> <p>Contingency:</p> <ul style="list-style-type: none"> ● If possible, book an alternate indoor location at the site ● Rent a tent with sidewalls ● Assign a team member to monitor radar during event and develop a response plan for different levels of weather

Face to Face, Hybrid and Virtual Events

The traditional face to face event while still a preferred option by many is not the only option for those looking to reach attendees who may not be able to attend in person. Hybrid events include a face to face and virtual aspect while a completely virtual event will not include any face to face activity. Attendee travel, natural disasters, and illness are just a few reasons that could be influencing your decision to either hold or prepare a contingency plan to pivot to a hybrid or virtual event.

It's important to note that while you may not think you have much experience with hybrid or virtual events, nearly all have participated in some kind of hybrid or virtual event. Most have used online registration, watched a webinar, or participated in a zoom meeting. Preparing for an event with added virtual aspects is just taking what you know and developing it out on a slightly larger scale.

As planners consider the best option for their event it's worth noting that adding a virtual aspect to all events will likely be beneficial. Numerous factors weigh into an attendees ability to participate in a face to face event and being able to provide an alternative will ensure your event stands out and is not missed out on. Recording live sessions that can be available on demand later or streaming your live event may be an option to capture the largest audience.

Below you'll find some key things to consider when preparing to add virtual aspects to your event:

- Attendees:
 - Do they have access to the internet?
 - If you're using an app, will they be able to manage downloading and utilizing it?
 - Remember to consider time zone differences
 - Will your attendees have access to the right equipment: computer, sound, microphone, video, downloadable software?
 - Consider how you will ensure they know what they need and how to test things out in advance
- Technology:
 - What are the technology capabilities of your team?
 - Will you need to have pre-registration?
 - How will you plan to facilitate registration?
 - Will you plan to use pre-recorded, live sessions, or a mix of both? For those new to virtual, it's recommended to start out with pre-recorded content to limit the coordination needs and potential for issues to arise.
 - Be sure to bring your I.T. team on board as soon as possible to discuss your plans and ensure capabilities.
- Accessibility:
 - How will you ensure your event is accessible?
 - Will you need to incorporate closed captioning?
- Engagement
 - Will you have live polls, question and answer, discussion boards?
 - If using Zoom, can you use the Zoom waiting room as a means of communicating general information/housekeeping rules?
 - How will you connect exhibitors to attendees?
 - Can you manage an interactive map or facilitate online one on one meetings with exhibitors?
 - Remember you have much more competition for your attendees attention! Consider making your sessions shorter or adding a break in the middle of sessions to allow the person to grab their coffee or check that email.
 - Food, drink, grab bags?
 - If you're going to add some sort of physical aspect to your event, how will you facilitate it?
 - Will you provide attendees electronic gift cards or deliver lunch to their office?