

# A Working Guide to Planning an Event



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Revised 2012

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# Introduction

This workbook has been designed to help agriculture and rural organizations increase their effectiveness in planning a special event.

Organizing a successful, worry-free event can be challenging for any individual or group. The steps to planning a week-long event or an evening seminar are the same: What do you and/or your organization want to accomplish? How are you going to accomplish it? After it is over, how will you know if you have accomplished what you set out to do?

How much detail you have to organize will vary from event to event. Use the entire workbook or only those worksheets necessary for organizing important information. This master copy of the work book will allow you to reproduce the worksheets as your organization needs them. For some events, the “to-do” lists may not be needed. Keep relevant information together for future reference.

The initiative and work of Rhonda Reid, district home economics at Edson, in developing the first draft of this workbook is recognized and greatly appreciated.

Alberta Agriculture  
December 1989

Reviewed and updated  
2012



# Planning an Event

It takes a lot of time and energy to plan an event. Trying to deal with all the details can be frustrating. This step-by-step guide has been designed to help you and/or anyone in your organization effectively manage and organize information related to any event being planned. Use a few or all of the forms in this guide. They have been designed to be used individually or together.

When you start planning an event, try to keep track of the basic information. Use the “Event Outline” form to help you identify key points of the event. Why are you hosting the event? what do you want participants to walk away with? and what are some suggestions for topics? Also, confirm a date for the event.

Planning an event is much easier if members in your organization get together to share the workload. Choose a planning committee that will get you the information that will satisfy the needs and interests of your target group. Try to select individuals that would work together effectively. Remember that people come from different sets of experiences. The “Selecting a Planning Committee” form will help you in organizing a committee. At a glance, you will be able to tell who is on the committee, what their responsibilities are and how to contact them.

Once you’ve identified the goal for an event, consider how you are going to reach that goal. Use the “Establishing a Timeline” form to help you prioritize all the jobs that need to be done prior to the day of your event. Some examples have been included to get you thinking about the kinds of tasks that need to be organized ahead of time. You will also likely have other things to do after the event.

As you start to plan the program, consider the amount of time registration, the opening address, refreshments/meals and select-a-sessions take up. The “Planning a Program” form is a sample outline for a one day event. It has been designed to help you plan your time and events over one day. Expand the form to cover several days or condense it to outline a half-day or evening event.

Planning the different sessions will be an easier task if you keep the goal of the event in mind. The “Planning a Session” form will help you organize important information for each session. The form takes you through all the steps of planning a session, from deciding what the session will be called to sending out all the appropriate thank-you letters.

The kind of budget you set up for the event you are planning depends on the type of event you want to host. If you are supplying a public service, your expenses may exceed your revenue. In this case, you will have to dip into existing funds to cover expenses. If you want to make a profit, your revenue must be greater than your expenses. Tailor the “Budgeting for an Event” form to help you manage the financial aspects for your event.

Once you’ve decided that you want to bring in a guest speaker, determine who the person will be. Use the “Arranging for a Speaker” form to help you organize the information you want to give the speaker. When you are speaking to the person for the first time, keep the “Speaker Profile” form handy too. It will help you to get all the necessary details on the speaker, while at the same time making you look organized and efficient. Remember that the kind of information you need on the speaker for a conference, evening meeting or kitchen talk will be the same. Refer to Appendix 1, “Sample Contract” when you start discussing fees.

Book the facilities for the event as far ahead of time as possible. Take the “Booking the Facility and Coordinating Set Up” form and follow it step by step to manage all the details. When you book a facility, follow up with a contract letter that outlines the details of your arrangements. Having something in writing lets you or the manager of the facility see if all the requirements are being met. Once you have booked the facility,

develop a set-up schedule. The people responsible for arranging the floor plan, planning table arrangements and setting up signs will have a better idea of what needs to be done and when. In the end, the little details are what participants will remember. The little things can make or break your event.

The caterer should be booked as soon as possible to avoid disappointment. The “Arranging for Food Service” form may trigger some things you had not considered.

Advertising and promoting your event are absolutely vital to its success. Each community reacts to advertising differently. Use the “Planning an Advertising Campaign” form to mark off strategies that work best in your community. Make a note of other things that work well for you. The committee taking over next year will be thankful!

Registering participants for an event can be a nightmare. Taking the time to plan ahead will save you a lot of trouble. Work through the form on “Managing Registration” and try a “mock” registration before the event to iron out any problems.

Deciding whether or not to invite a special guest depends on the goal of the event and what the person’s role might be. The “Inviting a Special Guest” form will outline steps to follow once you have decided to invite a guest.

Keeping track of who wants what equipment and where can be quite a job! The “Master Equipment Checklist” has to be designed to make that task easier. Mark off the total number of units of each type of equipment you will need for the event. In some cases, you will be able to borrow equipment from local sources (for example, schools, churches, community halls and so on). If you have no luck with these sources, you may have to try renting the equipment.

When you set up a display area, consider “why” you are having the displays in the first place. This reasoning will make it easier for you to decide who the exhibitors will be. You may have to decide whether you will allow selling of products. The form on “Setting up a Display Area” will also help you keep track of who the exhibitors are in case you need to contact them.

Putting registration/information packages together takes time and energy. Half the battle is thinking ahead to what contents to include, who is going to assemble the packages, where they are going to be assembled and when and who is going to deliver them to the event. Plan ahead to cut down on the actual preparation time. Use the form “Assembling Registration/Information Packages.”

In watching the details, you sometimes lose sight of the whole picture. The “Planning an Event Summary Sheet” is your event at a glance. It highlights important general information that all committee members should be aware of. You can easily update latecomers to the committee, while at the same time keeping yourself organized.

Evaluating an event, an important part of planning an event, is often overlooked. An evaluation tells you how the event turned out for the participants and others involved in organizing it and what changes should be made to make it more successful next time. When you evaluate an event, try to involve as many people as you can (for example, participants, advisory members, speakers and so on.) Ask for verbal comments or have individuals fill out a questionnaire. Remember, you want to use the evaluation to collect useful information. For example, were the goals and objectives met, what was good about the event and what are some ideas for making it better next time. The “Evaluating an Event” form will show you what to do with the information you have collected. Use the “Sample Evaluation” form for ideas in designing your own evaluation form. Design questions that will get you the answers you need.



Prepare a final report highlighting major results. The kinds of things you might want to include in a report are highlighted in the “Sample Report” form. A report will come in handy next time you or anyone else plans a similar event.

If you would like more information on selecting a committee or planning a program, the following publications are available from Alberta Agriculture and Rural Development. They are also available on-line at [www.agriculture.alberta.ca](http://www.agriculture.alberta.ca)

- 1921-60 Effective Committees
- 1922 Effective Meetings
- 1926-50 Promoting Your Organization’s Activities
- 1933-30 Program Planning for Organizations

The worksheets for this booklet appear in the following groupings:

- Getting the Basic Information – pages 6 to 13
- Organizing the Details – pages 14 to 22
- Wrapping it Up – page 23
- Sample Forms – pages 24 to 26

# Event Outline

Overall Goal(s) for the Event:

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Specific Objectives for the Event:

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Target Audience:

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Topics for Sessions:

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When:

Date:

Time:

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Where:

Location:

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# Selecting a Planning Committee

Criteria for Selecting Committee Members

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Main Function of the Committee

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Task(s) Assigned and Deadline(s)

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---

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Budget

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---

---

Future Meeting Dates and Times

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Committee Chair Contact Information

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## Committee Members

Name

Committee Position

Task(s)

Email

Phone Number

Cell Number

Name

Committee Position

Task(s)

Email

Phone Number

Cell Number



# Planning a Program

Date:

9:00 a.m. - 9:30 a.m.	Registration			
9:30 a.m. - 10:00 a.m.	Opening Address Chairperson:			
10:15 a.m. - 10:30 a.m.	Refreshments			
10:30 a.m. - 12:00 p.m.	Select-a-sessions			
12:00 p.m. - 1:00 p.m.	Lunch			
1:00 p.m. - 3:00 p.m.	Select-a-sessions			
3:00 p.m. - 3:15 p.m.	Refreshments			
3:15 p.m. - 4:00 p.m.	Group Session/Keynote Speaker Speaker:			
4:00 p.m. - 4:30 p.m.	Closing Address Speaker:			

# Planning a Session

Title	
Topic	
Description of Presentation	
Goal of the Event	
Speaker(s)	
Committee Member Responsible	
Audio Visual Needs (refer to the master equipment checklist)	
Room Set-up	
Fees/Expenses/Contracts	
Payment Schedule	
Thank You	

Prepare a page for each session

# Budgeting for an Event

	Actual cost of last event	Projected	Actual
<b>Expenses</b>			
<b>Fixed Expenses</b>			
Facility			
Speaker Fees			
Refreshments			
Advertising			
<b>Variable Expenses</b>			
Name Tags			
Handout Materials			
Door Prizes			
Miscellaneous (phone, mileage, photocopying)			
<b>Total Expenses</b>			
<b>Revenue</b>			
<b>Variable Revenue</b>			
Registration Fees			
<b>Fixed Revenue</b>			
Donations			
Exhibitors'			
Sponsorship			
<b>Total Revenue</b>			
Profit/Loss			
(Total Revenue - Total Expenses = Projected Profit/Loss)			

# Arranging for a Speaker

Name of Session \_\_\_\_\_

Checklist	Person Responsible	Deadline	Done
Determine who the speaker is			
Contact the speaker			
Outline the following:			
• program agenda			
• session content			
• additional information (website, blog, facebook or twitter page)			
• contract – informal/formal			
• salary and expenses			
• travel arrangements			
• accommodations			
• meal arrangements			
• location of the event (include a map and promotional material)			
• contact person who will be meeting him/her at the event and their contact information			
• conference chairperson's name			
Request details concerning:			
• information for the person's introduction			
• how the person would like to be introduced			
• do they require any special equipment (adapters, special cords, lapel microphones/head set)			
• any hand signals/cues the person will be using			
• any presentation tools needed (flip charts, etc.)			
• room layout			
• handouts/photocopying			
Assist the speaker			
• greet the person			
• show the person to the room			
• check that all the equipment is there and operating			
• load the presentation prior to start of session			
• introduce the person			
Don't forget to:			
• thank the person and present a gift			
• have the person sign payment form			
• pay the speaker			
• prepare the cheque			
• mail the cheque			
• complete the form for payment			



# Speaker Profile

Name:	
Address:	
Website:	
Phone number:	
Cell number:	
Email address:	
Educational background:	
Personal experience:	
How they would like to be introduced:	
Meals/travel/accommocations:	
Payment arrangements:	

# Booking the Facility and Coordinating Set Up

Name of the facility: \_\_\_\_\_

Address: \_\_\_\_\_

Contact person: \_\_\_\_\_

Checklist	Person Responsible	Deadline	Done
Book the facility			
<ul style="list-style-type: none"> <li>determine what is needed – banquet room, breakout rooms, trade show/display space</li> </ul>			
<ul style="list-style-type: none"> <li>send a letter of confirmation</li> </ul>			
<ul style="list-style-type: none"> <li>state date of use, price, cleanliness, what is included in the price, security access prior to event, set-up and take down times</li> </ul>			
<ul style="list-style-type: none"> <li>determine if there is in-house catering or not</li> </ul>			
<ul style="list-style-type: none"> <li>ask about a deposit and payment schedule</li> </ul>			
Provide facility manager with a set-up schedule and agenda			
<ul style="list-style-type: none"> <li>ask for day-of-event management contact information</li> </ul>			
Arrange the floor plan for sessions and tradeshow displays			
Plan the table arrangement			
<ul style="list-style-type: none"> <li>tables for speakers and late comers</li> </ul>			
<ul style="list-style-type: none"> <li>water on speaker’s table</li> </ul>			
<ul style="list-style-type: none"> <li>resource and registration tables</li> </ul>			
Set up the signs			
<ul style="list-style-type: none"> <li>directional, breakout rooms, welcome, registration, and sponsors</li> </ul>			
<ul style="list-style-type: none"> <li>no smoking</li> </ul>			
Miscellaneous			
<ul style="list-style-type: none"> <li>registration table</li> </ul>			
<ul style="list-style-type: none"> <li>coat rack</li> </ul>			
<ul style="list-style-type: none"> <li>tablecloths</li> </ul>			
<ul style="list-style-type: none"> <li>podium/lectern</li> </ul>			
<ul style="list-style-type: none"> <li>microphones (numbers and type)</li> </ul>			
<ul style="list-style-type: none"> <li>washrooms</li> </ul>			
<ul style="list-style-type: none"> <li>decorations</li> </ul>			
<ul style="list-style-type: none"> <li>room temperature</li> </ul>			

# Arranging the Food Service

**Caterer:** \_\_\_\_\_

**Type of meal:** \_\_\_\_\_

**Menu:** \_\_\_\_\_

**Special requirements:** \_\_\_\_\_

**Head count:** \_\_\_\_\_

Checklist	Person Responsible	Deadline	Done
Contact caterer			
Arrange meals - ask about special dietary concerns			
Decide on refreshments <ul style="list-style-type: none"> <li>• time</li> <li>• location</li> </ul>			
Line up entertainment/music for meals			
Arrange for grace/O Canada/or similar opening			
Order specialty items (i.e. centerpieces, linens)			
Provide final head count for meals			
Settle final payment			
Thank the caterer			

# Planning an Ad Campaign

Checklist		Person Responsible	Placement Deadline	Done
1.	Community organizations			
2.	Invitations			
3.	Media and press (before and after the event)			
4.	Newsletter			
5.	Newspapers			
6.	Posters			
7.	Notify Public Library			
8.	Contact radio/public service announcements			
9.	Contact local T.V. stations			
10.	Update website/blog			
11.	Create Twitter page			
12.	Create Facebook			
13.	Send mailouts			
14.	Contact community organizations			
15.	Send invites/event reminders			
16.	Contact media/press before and after event			
17.	Create advertisements for newsletter/ newspapers			
18.	Design posters			

# Managing Registration

Checklist	Person Responsible	Deadline	Done
1. Prepare registration forms			
<ul style="list-style-type: none"> <li>• design</li> <li>• include procedures for submissions of form and registration fee</li> <li>• include submission deadlines</li> <li>• make a final participant count</li> <li>• prepare select-a-session participants lists</li> </ul>			
2. Provide name tags			
<ul style="list-style-type: none"> <li>• select a type</li> <li>• order them</li> <li>• number them</li> <li>• code them for sessions</li> <li>• write the names</li> </ul>			
3. Prepare registration materials for participants			
<ul style="list-style-type: none"> <li>• folders</li> <li>• program outline</li> <li>• inserts</li> <li>• pens/pencils</li> <li>• evaluation</li> <li>• other</li> </ul>			
4. Arrange on-site registration			
<ul style="list-style-type: none"> <li>• determine number of people needed to carry out registration</li> <li>• provide them with a schedule of the event</li> <li>• outline their responsibilities</li> </ul>			
5. Assemble materials needed at the registration desk			
<ul style="list-style-type: none"> <li>• tape, felt pens, pins, scrap paper, extra name tags, scissors, stapler, etc.</li> </ul>			
6. Handle walk-in registrants			

# Inviting a Special Guest (VIP)

Checklist		Person Responsible	Deadline	Done
1.	Determine whether to invite a VIP			
2.	Determine which VIP to invite			
3.	Identify the person's role, if any, at the event			
4.	Send letter of confirmation			
5.	Decide where to seat the person			
6.	Greet the person at the event			
7.	Introduce him/her			
8.	Arrange for gifts if needed			
9.	Send a thank you note			
10.	Other			

# Master Equipment Checklist

Person responsible for equipment: \_\_\_\_\_

Equipment (fill in total number needed)	Sessions Needed For	Equipment Source	Pick Up Date
_____ Flipcharts, tape, markers			
_____ Extension cords			
_____ Microphones/cords			
_____ Podium/lecterns/cords			
_____ Screens			
_____ DVD player			
_____ T.V.'s			
_____ Camera for taping session			
_____ Camera for pictures			
_____ Lighting			
_____ Computers and projectors			
_____ Internet access			
_____ Computer cables			
_____ Other			





# Assembling Registration/ Information Packages

Checklist	Person Responsible	Deadline	Done
Develop/design registration/information packages			
For participants			
Contents:			
For speaker(s)			
Contents:			
For committee members			
Contents:			
Assemble the package			
Location:			
Final count: _____ Plus 10			
Deliver packages to the event			
How:			

# Planning an Event Summary Sheet

Name:			
Date:		Time:	
Location:	Caterer:	Phone	
Goal:			

The Planning Committee	Phone No.	Cell No.	Email
Chairperson:			

Managing Registration	Phone No.	Cell No.	Email
Person(s) responsible			
No. of registrants: _____			

Sessions	Speakers	Phone No.	Cell No.	Email
1.				
2.				
3.				
4.				
5.				
6.				

VIP Guests	Phone No.	Cell No.	Email

Equipment For Sessions	Phone No.	Cell No.	Email
Person responsible:			

Setting Up The Display Area	Phone No.	Cell No.	Email
Person responsible:			

Other Details

# Evaluating an Event

Checklist	Person Responsible	Deadline	Done
Design evaluation form (refer to the sample evaluation included in this booklet)			
Set out a container to collect completed evaluation forms (possibly email survey evaluation)			
Compile evaluation results			
Distribute evaluation results			
Discuss results with advisory committee members			
Prepare a final report with recommendations			

# Appendix 1 – Sample Contract Form

This is a contract agreed to on the		day of	20
Between		(name of organization)	
		(address)	
		(phone/cell number)	
		(email)	
and		(name of speaker)	
		(address)	
		(social insurance number)	
		(phone/cell number)	
		(email)	
The speaker will provide the organization with the following:			
For the		(session title)	
At the		(location)	
The contract must be fulfilled by		(date).	
The cost to the organization will be:			
a fixed fee of:			
or			
Total Hours per Session:		x Hourly Fee	=
Expenses:	Travel		
	Accommodation		
	Other (itemize)		=
		Total	
Payable in accordance with the following terms and conditions:			

Authorization Signature

Speaker's Signature

Witness

Witness

# Appendix 2 – Sample Evaluation Form

Name of the event:			
Goal:			
Objectives:			
To what extent were each of the objectives met?			
Objective #1	hardly met	partially met	fully met
Objective #2	hardly met	partially met	fully met
Objective #3	hardly met	partially met	fully met
What did you like about the event?			
What did you not like about the event?			
How did you hear about the event?			
	Internet/email		
	Newspaper		
	Newsletter		
	Word of Mouth		
	Friend		
	Radio		
	Other		
Did you attend the event last year?	yes	no	
What would you suggest to the committee responsible for planning a similar event next year?			
Additional comments and suggestions.			

# Appendix 3 – Sample Report

Information to include in a final report summarizing an event:

1. Name of the event
2. Date
3. Number of participants
4. A review of the goals and objectives of the event
5. A description of the people attending the event. Collect information that is useful, for example, the age group, number of men and women, the number attending for the first time and so on.
6. How people heard about the event
7. A financial statement
8. Recommendations for the next event
9. A copy of the program
10. Date to start organizing next planning committee