# EVENT PLANNING

A PRACTICAL GUIDE FOR SMALL AND MEDIUM PRACTITIONERS

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# Foreword

This guide was prepared by Real Marketing Solutions (RMS), at the behest of the Caribbean Technological Consultancy Services (CTCS) Network, an integral part of the Caribbean Development Bank (CDB). Its main use is to guide small and medium sized practitioners, within the bank's borrowing member countries, through the basics of event management. We have included some common scenarios which are intended to show the process one would take in producing events. It is hoped that these scenarios can be adapted by the practitioners and used for other / larger events, should the need arise. The document also contains some useful templates which can assist the event practitioners in their planning and implementation.

Throughout this document there will be references to "Event Planning Techniques & Procedures", which is a more in-depth and comprehensive look at the events industry, its best practices and processes. This master document can be accessed from the CDB library for references purposes only.

The authors of this publication have been involved in the event planning industry for over ten years and therefore have a wealth of academic - through formal training - and practical experience in the field. We trust that this guide will be helpful to you and ask that you note its content is not to dispense advice, but to assist with the planning and execution of personal projects.

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# Event Planning – An Overview

Event Planning, though still a relatively new field of study, has rapidly developed since it was first heard about in the 1990s. Since then, its' phenomenal growth has led to not only greater visibility of events worldwide, but also to increased resources and academic courses to give credence. There are therefore many event practitioners worldwide, whose services are often on demand year round.

Given this development you may ask, what is an event and, why is planning so important to it? It may surprise you that an event is simply anything of significance that happens. It is a one-off occurrence and has specific goals in mind. Planning makes the event more successful, as it allows you to look at what is being done more closely, therefore allowing you to ensure that everything is in place beforehand and that things run more smoothly.

# Getting Started – The Idea

You may have an idea for a personal event, or a client has approached you with one. Whatever the origin, there are certain basic questions which must be answered so that you can proceed on the right path. These questions cover what event planners call the 5Ws and the H – that is, the **W**hat, **W**hy, **W**ho, **W**hen, **W**here and the **H**ow. Let us look at them a bit closer so that you can fully understand:

- **WHAT** is the event? – Is it a meeting, cocktail reception, party, etc.?
- **WHY** is the event being held? – Is it to honour someone, celebrate something, to raise funds, etc.?
- **WHO** is the event being held for? – Is it for family, general audience or a particular audience?
- **WHEN** is the event supposed to be?
- **WHERE** will the event be held? – Will it be indoors or outdoors? A ready-made venue or one that now has to be prepared for the event? Etc.
- **HOW** many resources (human, financial) will be necessary to accomplish it?

Once you have successfully gathered the information from the above questions, you can produce the basic event contract, which can be used for reference and can also be used as authorization to proceed with the event planning. To show you how, let us assume you have been asked to plan a business event such as a meeting, seminar or conference…

You have been approached by the Association of Business Consultants (ABC) to coordinate their annual general meeting.  The meeting is scheduled for June 28th, 2010 and ABC is expecting approximately 50 people to attend. The meeting is expected to be 3 hours in length and light refreshments will be provided for attendees

| EVENT NAME: | General Meeting |
|---|---|
| Client's Name: | Association of Business Consultants (ABC) |
| Client's Contact #: | 123-456-7890 |
| Client's Contact Email: | abc@herenow.com |
| | |
| EVENT INFORMATION | |
| What is the event? (Aim) | Annual General Meeting |
| Why is the event being held? (Objectives) | To present the company's performance over the last year to its stakeholders |
| Who is the event being held for? (Target audience) | Stakeholders, members |
| Where will the event be held? | To be determined |
| When will the event be held? | Monday, June 28th, 2010 |
| How much will the event cost? | To be determined |
| | |
| Authorisation to proceed from Client: (signature) | |
| Date: | |

**Table 1: Basic Event Start-up Template**

# Tips

Before we proceed, however, there are some key tips which must be shared at this time.

- Firstly, give yourself adequate time to plan. This allows you more time to search for and secure the necessary resources, as well as to give you flexibility in terms of management risks and other such developments.

- Secondly, the more organized you are the better! Start a folder for each event and file according to document type – example contracts, correspondence, meeting information, etc.; and keep it up-to-date for the duration of the project. For the scenario started above you should have a folder labeled as follows:

| | |
|---|---|
| Event Name: | General Meeting |
| Client: | Association of Business Consultants (ABC) |
| Start Date: | February 17th, 2010 |

**Table 2: Basic File Name (example)**

- Thirdly, communicate…communicate…communicate! Keep all interested parties abreast of developments and progress throughout the project. This ensures that everyone knows what is required of them at all times and makes them feel a part of the team.

# Developing the Idea

Once the Client has accepted that the basic requirements have been recorded accurately and has accepted, it is now time to develop your event proposal. The purpose of this is to provide a general overview of all pertinent areas for the event. It also provides the event structure, and is useful to all involved with the project delivery. This can be used as the planning guide for your team and or all key persons involved in the success of the event. The event proposal follows on from the Basic Event Contract Template in Table 1, and is depicted in Table 3 below:

| ORGANISATION | | |
|---|---|---|
| Who will coordinate the event plan? | | |
| Event Owner/Sponsor: | ABC | |
| Estimate of budget: | $7,000.00 | |
| DELIVERY | | |
| Who Is responsible for execution of the event? | | |
| Proposed Date & Time | June 28$^{th,}$ 2010, 6:30pm | |
| | Notes | Owner |
| Administrative requirements: | Includes handling correspondence, contracts, licenses & permits, etc. | Donna, Claire |
| Finance requirements: | Includes preparing & managing production & operations budget, payments, invoicing, | George |
| Marketing/Advertising | Marketing plan, ad schedule, signage, etc. | Sedrick |
| Communication/Media Relations: | Preparing & communicating media relations plan, coordinating press conferences, etc. | Mark |
| Venue requirements: | Developing venue selection criteria, conducting negotiations for its use, ensuring stipulations met, etc. | Michele |
| Technical/Production: | Theme, stage, sound, lighting, layout, etc. | Diane |
| Security requirements: | Public & private security personnel, barricades, etc. | Tyrone |
| Food/Catering requirements: | Recruiting caterers, menus, drinks, etc. | Pauline |
| Medical/First Aid requirements: | Coordinating first aid/ emergency management personnel | Claire |

**Table 3: Event Proposal Template (example)**

# Planning your Event

Once your event proposal has been developed, communicated to, discussed and agreed by your team, it is time to prepare a detailed event plan. This is a comprehensive plan of all the steps involved in successfully executing your event. The event plan shows not only the tasks, but also who is responsible for each one and by when. It is important that you update this plan regularly during your event planning, and communicate each new version to your team so that everyone is kept up-to-date.

Note: The event plan should be developed from your event proposal, that way you ensure that you are covering all key areas. To help you through this process we will introduce another scenario.

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**SCENARIO II**

**COCKTAIL RECEPTION AND STAFF AWARDS** (*Can also be used for graduation*)

Your company has reached its 5th year of existence, and plans to host a cocktail reception to thank its clients for being there at this milestone, and in addition, will have an awards ceremony for the staff as a thank you for their service. You are charged with the responsibility of planning the events on behalf of the company. Table 4 below represents the event plan for this scenario:

</div>

| AREA | ACTIVITY | BY WHOM | BY WHEN |
|---|---|---|---|
| Finance | Compile budget | | |
| | Have budget approved | | |
| | Coordinate billings, invoices and payments | | |
| Venue | Research all possible venues | | |
| | Receive quotes on venue rentals | | |
| | Select venue | | |
| | Reserve all areas to be used at venue | | |
| | Identify parking | | |
| | Confirm what staff will be provided by venue | | |
| | Identify bathrooms, emergency exits etc. | | |
| Administration | Develop administrative process | | |
| | Develop event programme | | |
| | Approve and print programmes | | |
| | Determine type of awards to be given | | |
| | Obtain design and quotation | | |
| | Confirm design and production of awards | | |
| | Prepare list of awardees and type of award being received | | |
| | Obtain appropriate/relevant permits and contracts | | |
| | Prepare proposed guest list | | |
| | Have guest list approved | | |
| | Have draft of invitations prepared | | |
| | Approve invitations | | |
| | Confirm design and have invitations printed | | |
| | Distribution of invitations | | |
| | Record and follow up on RSVPs | | |
| | Procure, develop, direct and manage vendors | | |
| | Determine staffing requirements (Ushers, etc.) | | |
| | Identify required and appropriate talent (Speakers, DJs, entertainment, etc.) | | |
| | Obtain quotes for talent | | |
| | Confirm talent required | | |
| Technical / Production | Determine type and amount of furniture required e.g. Chairs, trestle tables, cocktail tables, lectern, etc. and place order | | |
| | Determine amount of table cloths, skirting, drapes, sashes etc. and place order | | |

| | | | |
|---|---|---|---|
| **Technical/ Production Cont'd** | Identify Decorator | | |
| | Have site visit and discuss décor with decorator. Remember to confirm with venue owner if there are any restrictions to what can and cannot be done in terms of décor. | | |
| | Determine size and layout of stage and meet with vendor at venue to discuss | | |
| | Confirm and place booking and load in - load out dates | | |
| | Discuss room layout with all service providers | | |
| | Discuss and prepare seating plan and inform venue | | |
| | Agree on music/audio requirements | | |
| | Obtain quotes from audio provider, photographer, videographer | | |
| | Confirm music/audio services | | |
| | Determine if any special lighting is required | | |
| | Discuss with lighting service provider | | |
| | Confirm any required lighting services | | |
| **Catering** | Obtain menus and quotes | | |
| | Approve menus | | |
| | Confirm deadline date for numbers? | | |
| | Confirm numbers and menus with caterer | | |
| **Security** | Agree on security requirements | | |
| **Contingency** | Prepare contingency plan | | |
| **First aid & emergency** | Discuss with venue owner their first aid and emergency plans, and supplement if required | | |
| **Signage** | Identify and obtain required signage | | |
| **Marketing & Communication** | Prepare press feature | | |

**Table 4: Event Plan Template**

# Budgeting

One of the most important aspects of your event plan is the budget. This will show all projected costs, which can later be matched back to the actual for future planning. Basic costs to be factored in include:

- ➢ Catering
- ➢ Venue
- ➢ Staff
- ➢ Transportation
- ➢ Stationery & postage
- ➢ Printing

- ➢ Photography
- ➢ Security
- ➢ Decorations
- ➢ Admin

It is necessary to prepare a budget (Table 5) for your event. This can be done using a spreadsheet software programme like MS Excel or Lotus 123.

| Description/Task | Planned (P) | Actual (A) | Difference (A-P) |
|---|---|---|---|
| **INCOME** | | | |
| Sponsorship | $30, 000.00 | | |
| Other | $20, 000.00 | | |
| ***Total Income*** | ***$50, 000.00*** | | |
| **EXPENSES** | | | |
| **Administrative** | | | |
| Staff costs | $1,250.00 | | |
| Management fee | $3,000.00 | | |
| Travel | $1,200.00 | | |
| Etc. | $750.00 | | |
| ***Subtotal ( Admin Expenses)*** | ***$6,200.00*** | | |
| **Event Expenses** | | | |
| Venue | $5,500.00 | | |
| Production | $10,000.00 | | |
| Health & Safety | $2,000.00 | | |
| Insurance | $200.00 | | |
| Etc. | $2,250.00 | | |
| ***Subtotal (Event Expenses)*** | ***$19,950.00*** | | |
| **Marketing & Communication** | | | |
| Advertising | $4,500.00 | | |
| Media/PR | $2,000.00 | | |
| Design & Print | $3,000.00 | | |
| Etc. | $2,500.00 | | |
| ***Subtotal (Mktg & Comm)*** | ***$12,000.00*** | | |
| **Total Expenses** | **$38,150.00** | | |
| Plus 5% Contingency | $1,907.50 | | |
| **Total Expenses & Contingency** | **$40,057.50** | | |

**Table 5: Budget Template**

*NB: For a more comprehensive look at budgeting and finance, please refer to the Event Planning Tools & Procedures document stored in the CDB library.*

## Tips

Before proceeding, here are a few more tips to help you along the way:

- Keep a live event budget. This will help you keep track of all expenses along the way as you plan the event.

- Keep a record of petty cash.

- Have two signatories assigned to the event's chequing account.

- If your event is not one with a set timeline (e.g. an anniversary, birthday party, etc.), be sure to conduct research into the best possible time to have your event. This prevents you from having to compete with others for event resources such as tents, production crew, security personnel, etc.

- Remember to approach any key potential speakers/hosts (e.g. government ministers, dignitaries, heads of companies, etc.) well in advance (4-6 months) of your event. Your correspondence to them should include a background of the event. It should state clearly the role you wish them to play in the event, for how long. Also state the proposed date, as well as an alternate.

## Venue Selection

When developing your event idea, careful consideration must be placed on choosing the right venue. Use the following key points to note when exploring venue options:

- Location – where is the venue? Can it be easily accessed by public and private transportation? Is there adequate signage, etc.?

- Facilities – does the venue have bathrooms accessible for use? Does it allow for the physically challenged, etc.?

- Capacity – how many people can the venue hold?

- Cost – what is the rental cost for the venue?

Develop your venue selection criteria based on the type of event you are having. Pay particular attention to your budget, and what special requirements you may need (e.g. parking, bathroom facilities, electrical, audio visual aids, etc.). Be sure to conduct site visits to all potential venues before making your selection. Ask the on-site personnel of other similar events held there in the past. Find out what worked and what did not. Find out what restrictions are in place for use of the venue. Be sure to ask about extra days for set up and break down, as these are important to the successful delivery of your event. You do not want to be rushing to set up on the day of the event and risk something going wrong.

## Venue Layout

The layout for the event depends on, among other things, the format, size and activities being undertaken. Pay particular attention to your space requirements and special needs for the event. Other points to consider when designing your layout include:

- A registration desk – for distribution of programmes, badges and other important event materials.
- Signage – showing patrons where to go e.g. exit, bathroom, dining area, etc.
- Seating Arrangements/Style – allow for distinction between reserved and general seating. Also, consider seating style (e.g. theatre, u-shaped, etc.) when planning your layout.

# Guest List Coordination

Depending on the type of event you are planning there may be a need for a guest list, and, as a result, it is necessary to manage this properly. Have everyone involved submit names of persons to be specially invited, along with their status (whether married or single) and their correct titles. Once all names are listed, and depending on your budget, it is possible that you may need to make changes. To do this the team must prioritise and focus on those who must be there only. It is a good practice for one person/area (e.g. admin) to have responsibility for the guest list. This not only provides a single point of contact for all patrons to respond, but also reduces errors such as duplicate invitations and incorrect information being sent out. It is important that you update the guest list as changes are made each time so that the final list is an accurate representation of who will be attending. Also, once invitations have been printed and distributed, make notes on the current list to reflect this. If patrons are required to respond confirming their attendance, also keep this information current on the file.

# Invitations

Invitations are important for certain events like weddings, and should therefore include all pertinent information such as location, date and time of event, dress code, and contact information for responses, etc.

Note: When preparing your event plan and timeline, factor in time to design, proof, print and deliver invitations. This entire process can take up to six weeks, and can affect the flow of your plan. Invitations should be delivered a minimum of two weeks prior to an informal event such as a show, and up to eight weeks prior to a formal event such as a wedding or a dinner. It may be necessary to follow up with persons who have been

tardy in responding to your invitations, so as to eliminate surprises on the night of the event; so be sure to leave a few days close to the event, to call these guests to confirm their attendance.

## Tips for Invitations

Yes, we all know invitations should carry the date, time and location of your event. However, it is also important to include:

- Who is holding the event
- The event type – e.g. wedding
- When they need to respond by, and if responses are only for regrets/confirmations
- Contact information for responses
- Depending on the type of event, the invitee may also be instructed to provide any special dietary, transport or access needs
- Whether the invitation is for them only, them and guest or transferrable
- Whether they must bring along the invitation to gain access
- The dress code for the event
  - Dress codes include:
    - White tie – extremely formal occasions where heads of governments are in attendance. Men usually wear coats with tails, matching black pants and white shirt, white waistcoat and bow tie; while women wear full length evening gowns.
    - Black tie – usually dinners and other formal occasions. Men are expected to wear black dinner jacket and pants, waistcoat, cummerbund and black bowtie; women wear either cocktail dresses or full-length evening gowns.

- **Lounge/Business Wear** – usually for afterwork/evening business functions. Men wear suits, slacks with collar and tie; women wear business suits.

- **Informal/Elegantly Casual** – suitable for garden/tea parties, etc. Ties are optional for men. It is preferred that no jeans, shorts or sneakers be worn to such occasions.

- Other types of dress codes include **Business Attire/Academic Dress** where patrons are expected to wear full gowns (e.g at university graduation ceremonies; **National/International** dress where guests are expected to wear their national dress.

- Depending on the type of event it may be necessary to include maps showing how to get to the venue (especially for unfamiliar venues); accommodation and transportation details (for non-local specially invited guests).

We will use the following scenario to help you manage guest list.

<u>**SCENARIO III**</u>

PLANNING A WEDDING

You are coordinating a friend's wedding. It is being held at 3:00pm on Saturday, February 27th 2010 at the Shrewsbury Methodist Church, Well House, St. Philip Barbados, followed by a reception for 100 guests at "Castle Mar". Invitations were mailed on 15th January. Your list of attendees should be as follows:

| # | Guest Name | Attending (Y/N) | Number of guests | Notes |
|---|---|---|---|---|
| 1 | Dawn Alleyne | Y | 1 | |
| 2 | Chantal Yearwood | Y | 1 | |
| 3 | Andrea Bishop | Y | 2 | |
| 4 | Roslyn Alleyne | Y | 2 | |
| 5 | Gino Yearwood | N | - | |
| 6 | Kelia Collins | Y | 5 | |
| .... | | | | |
| 80 | Kerry Pooler | Y | 2 | |
| | **Total guests confirmed** | | | |

**Table 6: Guest Management Information**

Note: In the above scenario, it is important when planning your guest list, to distinguish between your invited guest, and the bridal party, as this can allow you to plan other areas such as catering, or special seating arrangements better.

## Hospitality

For most events you will need to hire caterers. You may already have a database of caterers or now need to issue tenders for the supply of food and drinks for your event. Before choosing the caterer you must know your basic needs – whether finger foods or full meals; number of courses; number of patrons to the event; whether wait staff will be required; possible menus. It is a good practice to ask for sample menus and relevant costs from more than one supplier prior to selecting your caterer.

Note: Not all venues allow external caterers to provide food at their locations. This is especially so at hotels and conference centers where functions are held. Additionally, note that a special license may be required if alcohol will be sold at the event, so be sure

to apply for one at least two weeks prior to your event. Furthermore, be sure to incorporate any special dietary needs.

## Audio/Visual Needs; Photography

Your needs for audio and visual aids vary according to the type of event you are planning. For instance, if you are hosting a meeting as in our first scenario, you will need a public address system, a computer, projector, white screen and an extra microphone to satisfy your audio and visual needs. However, for a larger event, such as a school concert, you may not require all of these things. So be sure to treat all needs as event specific.

It is customary to want event photographs for public relations and or personal use after the fact. To this end, it is necessary to engage photographers and videographers to do so.

Note: For events with public figures in attendance, permission should be sought from them prior to taking their pictures so as to avoid any problems.  It is a good practice to brief your photographer so that he/she knows any special shots you wish taken.

## Event Staffing & Briefing

Though we identified our main event planning team earlier, we did not determine our staffing requirements for the event day.  Based on all of our planning, we can now identify additional staffing requirements to ensure smooth running on the event day. The number of resources also depends on the type of event, as well as its size. We will use the next scenario to show you how to determine staffing requirements.

You are head of the Special Events Committee at your school, and as such have responsibility for planning the school's fundraising concert. The concert is open to past and present students, as well as their extended families. Some members of the public may also attend as it will be advertised in the media, and tickets will be available for sale at external locations. The concert will feature entertainment from the school complement, and have vendors plying their trade to patrons.

| TASK | LEVEL | # OF PERSONS | NOTES |
|---|---|---|---|
| **Talent coordination** | High | 2 | Includes ensuring talent comfortable and that their requirements are being met |
| **Stage management** | High | 1 | Ensuring entertainment runs as scheduled |
| **Ticket management** | High | 4 | 2 persons each required to manage the door and food/beverage tickets respectively |
| **Vendor management** | High | 2 | Required to ensure vendors adhering to rules |
| **Security** | High | 1 | 1 person with overall responsibility for security. 2 security personnel are required at each money handling point (where the tickets are being sold); additionally, there should be adequate security to manage the crowd. The latter amount is usually stipulated by the Commissioner of Police |
| **Clean up** | High | 1 | 1 person required to oversee the cleanup operations to ensure venue left as found |
| **Total additional event day staff req'd** | | 12 | |

Table 7: Event Staffing Logistics

It is necessary to convene a briefing meeting with all persons who will be working with and at the event a few days prior to your event. This allows the team to become familiar with each another. Additionally, it allows areas of responsibility to be communicated and any discrepancies thrashed out early, so as not to cause confusion on the day of the event. It is important for this meeting to take place at the venue so that staff can do a live assessment and highlight any bottlenecks which can possibly result.

## Transport Requirements

Transportation must be factored into your event planning for certain events. These include weddings, tours, and those which have international guests for whom you have responsibility.  Depending on the type of event as well as the length of time you have to plan for it, you may need to tender for a transportation provider similar to how you would the caterer, unless you already have a good rapport with such a company. Alternately, you can request quotations from at least three service providers before making your selection based on your pre-set criteria.

## Marketing your Event

Depending on the type of event being held, you may need to advertise it. This is so for events open to the public – e.g. the school concert in scenario 4 above, or events such as fundraising dinners, fetes, workshops, seminars, etc..

The marketing process is made simpler by the research and planning completed in earlier stages. You have already determined who your target audience is for the event. You have also already determined how you intend to reach that audience, whether it will be via print (flyers, newspaper/magazine ads, posters, etc.) and or electronic

(radio, print, text message, internet) advertising. The marketing tool you choose depends on your budget and the resources available to you.

Note: It is best to work with a graphic designer/someone knowledgeable in design when producing print advertisements to ensure a professional look is achieved.

*NB: For a more comprehensive look at marketing your event, please refer to the Event Planning Tools & Procedures document stored in the CDB library.*

## Insurance

Within the events industry, there are different types of insurance you may need to acquire for your event. One common example is public liability insurance – for mass events such as trade shows, concerts, exhibitions, etc.; and on banners, flags, etc. Be sure to ask the venue manager what type of insurance is provided with the rental, and the areas covered. You can also obtain further information from an insurance broker who would advise what exactly would be needed for your type of event.

## Tenders

Though it may not be necessary to issue tenders for small private events, you may be called upon to assist with the coordination of a larger event and thus should know what to do. For large events, especially those funded by government, there is usually need for transparency and fair play, and as such service providers are selected for various aspects of the event based on pre-set and published criteria. The following steps represent an example of a tendering process:

1. Step 1: Invitation to Tender
    a. Identify what you want to tender

b. Identify dates, times, scope, description, amounts, etc. of goods/services required

c. Send to relevant companies who respond with an Expression of Interest (EOI)

2. Step 2: Distribution of the Tender Document

   a. Sent to those who submitted EOI, and includes

      i. Timescale and return details – i.e. when the tender must be returned, in what format, number of copies, return address & contact details

      ii. Project description – with event details such as date, timings, nature, audience profile, etc.

      iii. Statement of Requirements

      iv. Evaluation criteria – how tenders will be awarded

      v. Terms & conditions

      vi. Tender submission document

3. Step 3: Evaluation of Tenders

4. Step 4: Award Contract (and notify unsuccessful applicants)

## Contracts

Whether small or large in the event planning industry, it is a good practice to have contracts in place with all external contractors (caterers, vendors, transportation representatives, etc.) you will be using. The contract can be a simple document which clearly outlines the services required, the length of time needed, restrictions, expectations, payment methods and termination clause.  The contracts should be signed in duplicate prior to commencing service, and each party should retain a copy for their files.

# Tips – Event Plan Checklist

Before we proceed to the next phase, here is an example of an event plan checklist you can use to make sure you are on the right track.

| TASK/AREA | CHECK | NOTES |
|---|---|---|
| **PRELIMINARY** | | |
| Open event file | | |
| Discuss and complete budget | | |
| Event proposal | | |
| Agree proposal | | |
| Agree event plan & timeline | | |
| **FINANCE** | | |
| Compile production & operations budget | | |
| Approve budget | | |
| **EVENT SPECIFICS** | | |
| Discuss possible dates | | |
| Agree final event date | | |
| Identify special guests/VIPs & approach them | | |
| Info sent to special guests/VIP for confirmation of attendance & participation | | |
| Request portfolio on special guests/VIP | | |
| Agree guest list coordinator | | |
| Request list of attendees from team | | |
| Agree final guest list | | |
| Draft invitation and info for proofing | | |
| Proof invitation and info | | |
| Approve invitation and info | | |
| Design and print invitations | | |
| Mail or deliver invitations | | |
| Monitor invitation replies and follow up if necessary | | |
| Determine marketing & advertising strategy | | |
| Roll out advertising plan | | |
| Research possible venues | | |
| Agree venue | | |
| Reserve venue and all necessary space | | |
| Request quotations from caterers | | |

| TASK/AREA | CHECK | NOTES |
|---|---|---|
| Event Specifics cont'd | | |
| Approve menus with event owner | | |
| Inform caterers of confirmed numbers | | |
| Agree seating arrangements | | |
| Agree technical & production (stage, sound, lighting, visual, décor, chairs, tables, toilets, tents, etc.) requirements | | |
| Contract & brief photographer and or videographer | | |
| Request quotations from transportation providers | | |
| Agree transport provider and book slots | | |
| Confirm contact details, routes, dates, times, etc. | | |
| Produce and erect signage | | |
| Agree staffing and security for event | | |
| Obtain insurance specific to event | | |
| Obtain relevant licenses (liquor, loud music, health, etc.) | | |
| Enlist emergency management services | | |
| **EVALUATE THE EVENT** | | |
| Debrief team | | |
| Prepare & distribute event report | | |
| Close event file | | |

**Table 8: Event plan checklist (example)**

# Event Delivery

It is now the day of your event and you should be calm and ready, because you planned everything beforehand, and you even have contingencies in place just in case something goes wrong. That does not mean that you can get complacent though! A good event planner is always alert and prepared. Always be aware of Murphy's Law – "Anything that can go wrong will go wrong when you least expect it!" Thus, a good event planner always has a contingency plan for each critical area. Even though something unexpected may crop up, as an event planner you should remain calm, be able to think and act quickly to find a solution and communicate it to your team.

Walk with copies of the current guest lists, running order, and any other information that may be necessary on the event day. Make sure your event team is equipped with fully charged, ready to use mobile phones and / or hand-held radios. They should also be easily identifiable, be it by branded clothing and or clearly visible badges.

It is a good practice to develop an event plan for use on the day(s) of your event. This will act as a guide to all involved and shows what is to happen, when it will happen, who is responsible for making it happen and for how long. It also lists contact information (name, cellular numbers, location on the venue, etc.) for all key players of the event. This event plan should be distributed to all key staff during the briefing meeting before the event starts. Should there be any changes to the plan it should be communicated to everyone immediately.

# Post Event Activities

Congratulations! You did it! Your event was a success and you are relieved but note, your event day is not complete until the venue has been cleared and cleaned of all materials used for its production. Make sure your cleanup crew is on-hand, if possible, during or available immediately after the event to make the place presentable before you hand it back over to the venue manager. Be sure to adhere to the terms and conditions of your contract because you may want to re-use the venue.

Additionally, you should ensure that any loose ends regarding your event are tied up before proceeding. This includes:

- Ensuring that all event expenses are paid within one week of your event.
- Showing appreciation (via press release/ad, thank you cards/letters, cocktail function, etc.) to all those who helped make your event a success.
- Conducting a debriefing meeting with your team, with reports being produced by all relevant team leaders (e.g. security, venue etc.) which will help you better gauge the event from their perspectives. This will also allow you to document any feedback (both positive and negative), as well as recommendations regarding your event.

# Evaluating your Event

Any good manager knows that a process is not complete without conducting a thorough evaluation, and as such you, as the event planner/manager, you need to complete this process. An evaluation is necessary for highlighting what worked and what did not work. It allows you to save time on such events in the future by referring only to what worked. The evaluation process allows you to match what actually happened to what you wanted to happen, thus highlighting if you were successful or not in achieving your event objectives. Once your evaluation process is complete, you can prepare a report about the event which should be communicated to all stakeholders. The following evaluation template can act as a guide in this regard:

| EVENT SUMMARY | | | |
|---|---|---|---|
| Event Name: | | | |
| Event Type: | | | |
| Event Venue(s) | | | |
| Event Date(s) | | | |
| Planned Event Budget: | | Actual Event Budget: | |
| **EVENT DETAILS** | | | |
| Number of patrons: | | Number of specially invited guests: | |
| Caterer: | | Transportation provider: | |
| Stage: | | Sound: | |
| Lighting: | | Décor: | |
| Entertainment / Guest Speakers: | | Vendors: | |
| **EVENT TEAM** | | | |
| Event Coordinator: | | Client: | |
| Client Contact #: | | Client Email address: | |
| **FEEDBACK** | | | |
| Key issues: | | | |
| What worked: | | | |
| What failed: | | | |
| Areas to be improved: | | | |
| **OUTCOMES** | | | |
| Planned versus Actual Objectives (Which ones were met): | | | |

**Table 9: Event Evaluation Template (example)**

# Suggested Further Readings

The Business of Event Planning - Behind the Scenes Secrets of Successful Special Events by Judy Allen 2000 (John Wiley &Sons Canada Ltd)

Event Planning: The Ultimate Guide to Successful Meetings Corporate Events, fundraising Galas, Conferences, Conventions, Incentives and Other Special Events by Judy Allen

Professional Event Coordination (The Wiley Event Management Series) by Julia Rutherford Silvers

Event Marketing: How to Successfully Promote Events, Festivals, Conventions, and Expositions (The Wiley Event Management Series) by Leonard H. Hoyle

The International Dictionary of Event Management (The Wiley Event Management Series) by Peter E. Tarlow

Special Events: Event Leadership for a New World Fourth Edition by Dr. Joe Goldblatt, CSEP (John Wiley &Sons)

Event Management & Event Tourism by Donald Getz. Cognizant Communication Corporation 1997

Event Management in Leisure and Tourism by David C. Watt 1998


## Suggested Website Reading

http://www.eventscotland.org/files/events-management-a-practical-guide.pdf

# Event Planning Software

If necessary, you can also purchase event planning software to assist you in your ventures. To help you in your selection process, you can visit http://www.capterra.com/event-management-software to compare the products available. Additionally, please find below some links to review product offerings for some of the available event planning software.

- EventPro Planner – http://www.eventpro-planner.com/
- FrogWare Creative Software Solutions – http://www.frogwaresoftware.com
- SmartDraw – http://www.smartdraw.com/specials/ppc/eventplanning.htm?id=82191

- Eventsforce – http://www.eventsforce.com/home.html