



EVENT PLANNING

USER'S MANUAL

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Pre-Event

Months or weeks before the event

Meet with the team as soon as the project has been turned over and do the following:

1. Discuss the purpose of the event and set an agenda.
 - 1.1. Develop a mission statement which will be used as the framework for all activities to do with the event. Talk through the top things the client wishes to accomplish as a result of the event and concentrate on these goals. Be specific as possible. You may use the questions below as a guide.
 - Who – who are the target participants? Is there a need to celebrate a specific individual or group of individuals?
 - What – will there be a need to look for potential sponsors and donors?
 - Why
 - When
 - Where – does the event aim to educate a community?
 - 1.2. Develop a timeline with deadlines for each activity.
 - 1.3. Create an action and contingency plans for any problems that may arise.
2. Delegate roles and tasks.

- 2.1. Depending on the event type, form teams under the supervision of team leaders to oversee the following:
 - A. CEO
 - Sponsorship and partners
 - Marketing and promotion
 - VIPs and speakers
 - B. Operations
 - Location or venue planning and preparation
 - Food and beverages
 - Contractors and vendors
 - Registration and invitations
 - Permits and licenses
 - Accounting
 - C. Jr Account Executive
- 2.2. Waste management
- 2.3. Traffic management
- 2.4. Risk management
- 2.5. Security plan
- 2.6. Write down names and roles of each team member.
- 2.7. Collaborate and ensure that the team is comfortable with the designation and that they are up to speed with the planning and organising.
- 2.8. Check if seeking volunteers or hiring contractors is needed.
3. Prepare a budget.
 - 3.1. If the client has not provided a budget, prepare one, and try to find ways to keep the costs low.
 - 3.2. Get approval for the budget.
 - 3.3. List all possible expenses and incomes—funds from sponsors or donors, contingent fees, logistics expenditures, etc.
 - 3.4. Strictly monitor all spending.
 - 3.5. Create a system for receipts, confirmations, invoices, and other paperwork.
4. Select a location or venue.
 - 4.1. Choose a location or venue that is easily accessible by majority of the potential participants. The following factors should also be considered when selecting a location or venue:

- Capacity – number of seats
 - Availability – on the chosen dates
 - Accessibility – distance from mass transit
 - Parking space
 - Air-conditioned or not
 - Condition of toilet and green rooms
 - Provision for food, equipment, furniture, lighting – if needed
 - Power backup
 - Availability of special rooms – such as dressing rooms, meeting halls, etc.
 - Cost
- 4.2. Schedule a visit to the location or venue with the team.
 - 4.3. Once decided, book and confirm the location or venue in writing.
 - 4.4. Request written confirmation from the manager of the location or venue.
 - 4.5. Submit deposit for reservation if needed.
5. Secure permits and licences.
- Once the location or venue and date have been confirmed, secure all necessary permits and licenses needed to hold the event such as the following:
- Any government permit
 - Food permit
 - Noise permit
 - Approval to erect promotional signage
 - Road closures
6. Identify potential sponsors and donors.
- 6.1. Create a sponsorship proposal.
 - 6.2. Deliver sponsorship packages.
 - 6.3. Follow-up after one week.
 - 6.4. Collect from sponsors and donors before the event.
7. Market, advertise, and promote.
- 7.1. Develop a marketing or communication plan detailing how to inform potential sponsors, donors, and participants of the event. The marketing and promotion of the event is significantly important in ensuring that events are financially viable.

- 7.2. Design promotional materials like brochures, posters, advertisements, social media updates, and email blasts. These materials must have complete information leaving potential participants with only a few questions. Include the following:
 - Name of the event
 - Theme or tagline
 - Date
 - Time
 - Venue
 - Primary speakers or special guests
 - Logo
 - Sponsors
 - 7.3. If needed, build a responsive and clean website that is optimised for search engines or microsite attached to Barnes PR's primary site. On the website, include the things listed in step 7.2. Use relevant photos or information, testimonials, and other related activities
 - 7.4. Create social networking accounts. Think of the potential participants and use the proper sites and tools to reach them. Have a repository of all the usernames, passwords, emails, and URLs to easily track the accounts.
 - 7.5. Distribute flyers, posters, emails, newsletters, or brochures to potential participants.
 - 7.6. Submit event information to local events calendars and websites.
 - 7.7. Submit a press release.
 - 7.8. Prepare and schedule subsequent press releases and relevant social media updates.
8. Create registration forms and invitations.
 - 8.1. Build an online event registration form and invitation. Eventbrite, Evite, Meetup, and Ticketbud offer registration and ticket selling services. At present, Eventbrite is the preferred Barnes PR choice.
 - 8.2. On the registration form, determine what is included in the cost of registration.
 - 8.3. Scrub mailing lists of past events that can be used for the upcoming event.
 - 8.4. Send an email announcement to potential participants with a link to the website, online registration form, and social networking accounts.
 - 8.5. When distributing paper invitations, ensure ALL invitations are distributed within the same week. Invitation distribution should never exceed five

days. Aim to start distribution on a Monday and ALL should be completed by Friday. DO NOT allow invitations to go over to the next week. Weekends are especially good times for potential guests to talk about who got an invitation and who didn't which reflects poorly on the client.

9. Select food vendors.
 - 9.1. Schedule food tasting and/or bidding with caterers or food vendors. When appropriate, provide vendors with a menu, if specific needs are requested by the client. Food and beverages play a significant role in setting the right atmosphere for events, and this should never be underestimated.
 - 9.2. Book and confirm caterers or food vendors in writing.
 - 9.3. Request written confirmation from the caterer or food vendor.
 - 9.4. Request a copy of the Health Services Authority certificate and details of electrical requirements.
 - 9.5. Apply for temporary food premises permit if needed.

10. Acquire services of contractors/vendors.
 - 10.1. Book, rent, or buy (whichever is appropriate) the following:
 - Equipment for stage, lighting, PA system, etc.
 - Portable toilets, fireworks, marquee, generators, etc.
 - Host or Master of Ceremonies (MC)
 - Photographers and/or Videographers
 - Chairs, tablecloths, tents, etc.
 - Cleaning crew
 - 10.2. Book and confirm all contractors in writing.
 - 10.3. Collect written confirmation from the contractors along with their invoices.
 - 10.4. Submit deposit for their services if needed.

11. Create a site plan and prepare the location or venue.
 - 11.1. Schedule an ocular visit.
 - 11.2. Design plan of the location or venue
 - 11.3. Create a cleaning and maintenance plan.
 - 11.4. Hire toilet cleaners/ground maintenance if needed.
 - 11.5. Clean up the location or venue in preparation of your event needs.

12. Develop a security plan.
 - 12.1. Book, rent, or buy (whichever is appropriate) security and two-way radios.

- 12.2. Create a crowd control plan.
- 12.3. Notify the police, ambulance service, and fire department of the event if necessary.

13. Develop risk management plan (when needed).
 - 13.1. Book or hire first aid officers.
 - 13.2. Perform risk assessment involving all key stakeholders.
 - 13.3. Obtain relevant insurance, and send copy to the team if needed.
 - 13.4. Create contingency plans in cases of bad weather, low attendance, natural calamities, etc.

14. Develop traffic management plan.

If needed, design a traffic plan for the following:

 - VIP and People With Disability (PWD) parking
 - Pedestrian access
 - Parking area
 - Entry and exit points
 - Road closures

15. Prepare a contact list.

Create a contact list with phone numbers, physical and email addresses of the following:

 - Team leaders
 - Team members
 - VIPs / Sponsors / Donors
 - Speakers
 - Suppliers
 - Contractors

16. Prepare documents and checklists needed for the event.
 - Budget sheet
 - Sponsorship letters
 - Background document of the event for relevant partners/stakeholders
 - Action/Contingency plan
 - Timeline and deadlines
 - Checklist of work to be done
 - Checklist of things to be used before, during, and after the event

- Event schedule (timing of each item in the event's programme)
 - Invitations
 - List of people to be invited
 - List of participants
 - Materials for marketing, advertising, and promotion
 - Report of the event (for media)
17. Prepare items needed for the event.
The following may be done in random order:
- Create the event schedule.
 - Create scripts/background documents for the host or MC.
 - Purchase tokens, awards, trophies, souvenirs for the participants and speakers.
18. Prepare the event kits.
The kit may include any of the following and whichever is appropriate:
- Note paper
 - Pen
 - Bottled water
 - Snack bar
 - Materials about the event
 - Hand-outs for each session
 - Mementos or tokens

24 hours before the event

1. Check all invitations and responses.
 - 1.1. Create a list of invitees in a spreadsheet and get a tally for heads.
 - 1.2. Send email to registered participants, when appropriate, with details of the event such as directions or maps and parking instructions that will assist attendees in getting to the location or venue as easy as possible.
 - 1.3. Send email to key people such as VIPs and sponsors or donors reminding them of the event details.
2. Finalise the media list.

- 2.1. Follow-up with reporters, journalists, or bloggers that were contacted to cover the event and confirm their attendance.
- 2.2. Discuss with the team potential questions that may be asked and how to answer them.
3. Visit the location or venue for a final inspection.
 - 3.1. Check placement of tables and chairs, setup of equipment for stage, lighting, PA system, etc.
 - 3.2. Hire cleaning crew if extra cleaning is needed.
4. Prepare an **event kit** for the whole team.

This kit should contain extra hand-outs, USB, first aid kit, snacks, chargers, and other materials that may be needed during the event should the need arise.
5. Monitor the weather.

In case of a bad weather, do the following:

 1. Prepare a contingency plan especially for events that require outdoor activities.
 2. Send email to all participants with information about the backup plan.
 3. Contact contractors with information about the backup plan.
6. Review logistics.

Contact the location or venue manager to ensure that everything from parking to signage, security, and all the necessary materials are all set for the event.
7. Contact vendors and contractors.

Communicate with all the vendors and contractors and review the details of the event. Ensure that vendors and contractors have the right headcount, schedule, and equipment.
8. Check in with your speakers.

Check in with your event speakers or host to inquire if they need help with their presentation, materials, or getting to the location or venue.
9. Review all checklists.

Review all checklists several times to ensure that you have not missed anything and that all things needed for the event are complete and available when needed.

10. Meet with the team.

Schedule a meeting with the team to discuss any of the following:

- Dress code - Wear a distinct badge or other noticeable implement so participants can easily find help if needed
- Arrival time
- Delegation of roles and tasks
- Point person
- How to handle guests
- Location or venue plan

On the Day of the Event

1. Arrive early to the location or venue.
If you imagine that two hours will be needed to set up for the event, plan on arriving four hours ahead of time.
2. Gather the whole team for a full briefing.
3. On the day of the event have person(s) in charge of the following and review chain of command in case of an emergency.
 - Overall coordination
 - Green room
 - Food
 - On-stage activities
 - Hosts or MCs
 - Computer, LCD projector,
 - Photographer and/or Videographer
 - Reception or welcoming
 - Crowd management and PR with crowd
 - Parking Area
 - Security
 - Distribution of various things (Gifts, Certificates to selected people as well as all the Participants)
 - Break down and clean up

4. Organise a reception or registration area.
5. Distribute a feedback or survey form after the event.
6. Break down and clean up.
 - 6.1. Remove banners, posters, equipment, and other materials used during the event and pack away accordingly.
 - 6.2. Check to make sure nothing valuable has been left behind.

After the Event (to be completed within a week of the event)

1. Request all images/video from the event photographer.
These should be placed in an appropriately named folder in the Event Photos Dropbox folder.
2. Finalise the press release and any other outputs for distribution.
3. Return items.
For any items borrowed or rented, ensure items have been picked up and returned to its owners/vendors.
4. Send a thank you letter/email to the following:
 - Team and volunteers (if there are)
 - Key people such as VIPs and sponsors or donors
 - Speakers
 - Participants
5. Close-off budget and accounting.
 - 5.1. Gather all receipts and invoices.
 - 5.2. Settle all accounts.
 - 5.3. Prepare a cash log to be submitted to the client.
 - 5.4. Prepare the accounting sheet if invoices are to be submitted directly to the client, prepare a cover letter listing invoice numbers, and then attach invoice(s). Always place on this letter the name of the event and its date.

Notify the vendor when this is done. Whenever submitting such documents, always do it by hand and document the date, time, office, and the name of the client's employee receiving the document.

6. Distribute any souvenirs or other publications to relevant people.
 - 6.1. Keep 4 copies of any booklets/cards/printed event documents for the Barnes PR archives.
 - 6.2. Two copies of all booklets should be sent with the Barnes PR standard template letter to the following places:
 - H. Lavity Stoutt Community College Library
 - Government Archives Unit
 - Virgin Islands Public Library
7. Update website and all social networking accounts.
 - 7.1. Create a Facebook album to showcase images from the event.
 - 7.2. Select six (6) images that can be used across social media and create appropriate blurbs to be used for the week following the event, to reflect on the event and the quality of Barnes PR's work.
 - 7.3. Write a 300-word summary of the event to accompany the six (6) images for the Barnes PR website.
8. Ensure that all files are placed in appropriate folders on both Dropbox and Google Drive to ensure later access by all personnel to event documents.
9. Check inventory.

For any items used, place in appropriate storage bins and pack away. If any item was broken/destroyed during the course of the event, update the office inventory list to reflect this.
10. Schedule a meeting with the team.

Discuss how the event went and to look at ways of improving future events based on the feedback or survey form distributed to the participants during the event.