



UNIT-1

Event Planning Essentials

Learning Outcomes

By the end of this unit, the learner will be able to:

- ✓ Explore conference planning essentials
- ✓ Discuss how to make budget for events

Setting Goals and Objectives

One of the first things to consider as you start planning is what the purpose of the event is. You may be told this outright by your boss (“I want you to arrange a quarterly meeting for 10 of our internal staff”), or you might need to do some interviewing and conduct a more formal needs analysis. Whichever approach you take, here are some questions to ask as part of your initial planning. (You can organize these answers into your event plan and into a formal needs analysis if you like.)

- What is the purpose of the event? (Information sharing, retirement celebration, 30 year work anniversary, annual meeting, trade show, conference, workshop, etc.)
- Who will attend? (This is your main audience.)
- What is the budget?
- How formal is the event: formal, semi-formal, casual, or some other mix?
- Is there a preferred venue?
- Is someone leading the event, or do we need a master or mistress of ceremonies (MC)?
- Are there preferred speakers?
- Are there any restrictions on food and drink? (Make sure you include thoughts on alcohol)
- How often does the client want you to provide a status update?

As you have your first planning conversation with your manager or client, other questions will arise. For example, if the event is formal, do they also expect a written invitation or are e-mail invitations suitable? If there is a preferred MC, does your manager wish to ask the person, or do they prefer you to do that?

Following this initial meeting or telephone call, you need to prepare a written document to confirm the decisions that have already been made. This could be in the form of a needs analysis, briefing, or an e-mail, depending on your organization. Whichever format you use, you need to call on your passion for details when preparing the document so that no essential elements are missed.

How to Write a Briefing Note

What is a briefing note?

A briefing note is often used in government as a way to keep senior officials informed about all kinds of topics. They are very handy in business, too, because they are such a concise way to communicate. Briefing notes have many formats, but this section will discuss some essential elements that are always included.

What makes a good briefing note?

A well-written briefing note quickly provides an update on a person, issue, or (in our case) an event. The briefing note is clear, concise, complete, and correct. It should be:

- **Short:** One to two pages long. Use headings and sub-headings, lists, bullets, and white space to make reading easy.
- **Clear:** Simple and to the point, this is not the time to mystify the reader with your writing skills.
- **Concise:** Every word is necessary and used efficiently. Include only the information that matters to the reader.
- **Complete:** The reader should not have to come back to you with questions. If there is information missing, point it out.
- **Correct:** Make sure that your facts are correct. Don't make assumptions.

How should your briefing note be formatted?

Include only the sections that are relevant to your reader. There are lots of variations on format. Your company may have a preferred format to make things simpler. If they don't, here are your guidelines.

What should be included in your briefing?

The following points are also required in many briefings. Remember, just use the ones that you need.

Background

Details the reader needs to understand about how the current situation came about, problems that have been encountered, and history of the topic. Don't include statements that are repeated in other sections.

Current Status

Describe the current situation, people involved, and the current state of the matter or situation.

Key Considerations

Facts, considerations, and developments go in this section. You need to objectively present the details needed by your reader so that they have all the information required to make a decision. Substantiate anything that you state with evidence. If you think that they may need some more details, you can attach an appendix.

Next Steps or Options

Your thoughts and observations on the key considerations, along with a concise description of the options, pros and cons, or simply what will happen next.

Conclusions and/or Recommendations

Summarize the essential elements of what the reader needs to know. Busy people skip to this section and read it first and then go back only to read what they need to, so don't introduce anything new here. If you are making a recommendation, be sure that it is clear, direct, and is the best advice that you can offer.

Getting Organized

Event planners are very detail-oriented and well organized. It helps to take advantage of planning tools to keep track of everything, and there are many options available today. We will use a basic spreadsheet application to set up a table, which are easy to modify and format. You can also look at special event organizing programs or project management software that your organization may already be using.

The image below shows a starting template for you to keep things organized. When you design your sheet, simply add columns and rows that are specific to your event and the things that you need.

Event Planning Worksheet							
Event name:							
Event date:							
Task	Status	Budget	Actual Cost		Comments	Due Date	Assigned
Initial Details							
Develop event theme							
Develop colors							
Set up committee							
Budget							
Identified in needs analysis							
Discuss with accounting							
Submit for final approval							
Venue							
Identify three options							
Visit two options							
Sign contract							
Agenda							
First draft							
Second draft							
Third draft							
Marketing and Promotion							
E-mail campaign							
Telephone campaign							
Mailouts							
Swag Bags/Gifts							
Bags ordered							
Items received							
Bags filled							

About the 🟢🟡🔴 (GYR) Column

GYR borrows from project management symbols and the green-yellow-red lights of a traffic signal. **Green** means that this task is on track and will be completed on time and budget. **Yellow** means caution: there is a risk that this task will be delayed or over budget. **Red** means that the task is way off track.

As the event planner, your job is to keep everything green. When they do go yellow, you must do what's needed to get things back on track. You will probably need to speak with your manager or client and the committee so that you can strategize a plan. When things go red, they're serious. You must react immediately to return the task back to a green state.

Conferences

Conferences are among the most important events that professional event managers organise. Conference planning can be the responsibility of a corporate employee or a professional meeting planner.

Conference Planning

There are two important questions to ask when considering to organise a conference:

- What purpose the conference has to achieve?
- How that purpose will be achieved?

Some of the more common purposes are to:

- Co-ordinate Activities
- Build Morale
- Secure Agreement
- Brief Staff/Clients
- Solve a Problem
- Exchange Information
- Initiate Policy
- Product Launch

Conference Planning Essentials

Conference management and planning includes several key components:

a) Venue/Facilities

Selecting the correct Venue may require lots of time. Preparing a check list for the conference facilities and requirements helps narrow down the search for appropriate venues for the conference. The following points should be decided prior to searching for a conference venue.

b) Location

To help decide the location, ask the following questions:

- How far are attendees travelling?
- If attendees are being flown in, how far the venue is from the nearest airport?
- How are attendees arriving to the venue? if by car, how long is the drive?
- Does it need to be close to the workplace? Or should it be away from the busy workplace?

c) Capacity

Ensure that the venue can provide enough space for the number attending the conference and the room layout is appropriate for the conference purpose. The following types of room layouts may be used:

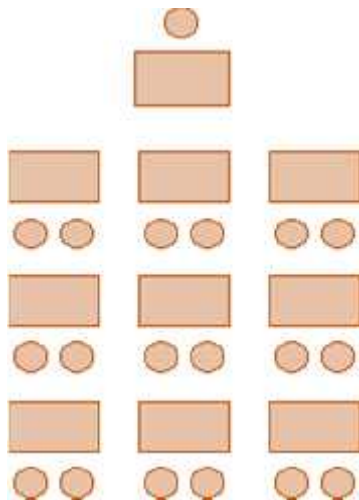
Theatre

This type of layout can be useful when the conference is held for briefing a large group, initiating a policy or for building morale and the attendees are not required to write anything.



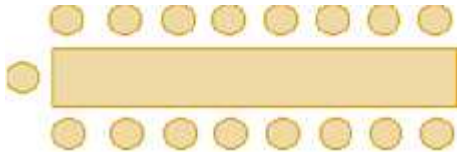
Class Room

This type of layout is used for briefing the large groups who are also required to take notes and to work in small groups of a maximum of 4 for exchanging information, or solving a problem.



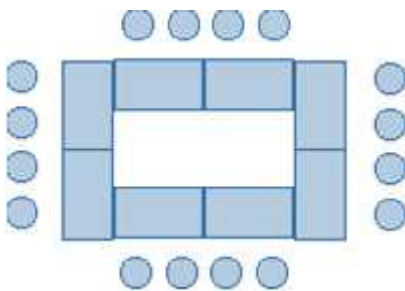
Board Room

This type of layout allows all participants to see each other in the conference and is useful for securing agreement or solving a problem amongst the group. But the group should not consist of more than 20 people.



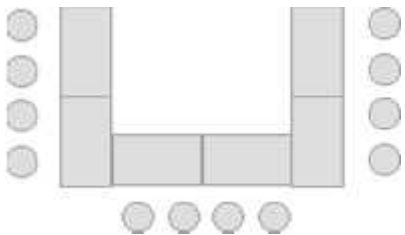
Hollow Square

The participants sit face to face but unlike the board room arrangement, there is more space across from participants.



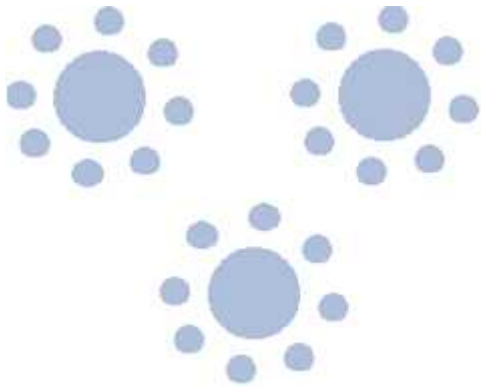
U-Shaped

This type enables group interaction but the conference is focused around a facilitator at the front of the group.



Banquet Style

A large conference can be arranged in smaller groups seated around round or rectangular tables where group and workshop activities can be performed through the conference. The banquet style also encourages attendees to network with their immediate group at the conference.



Facilities

There are a number of facilities which should be considered for a conference:

- The presenter facilities eg speakers, mics, audio, visual aids, screens, boards, flipcharts etc.
- The attendee facilities eg catering, seating, lighting, break up rooms for workshops, writing materials etc.

Accommodation

If the conference is residential the venue should address the following issues:

- Whether the accommodation will be required close to the conference facilities
- How are the attendees to be roomed eg in pairs, triples,

Budgeting Basics

The Real Budget

Here is a sample budget calculation worksheet, which is broadly based on what many events need.

Budget Planning Worksheet

	Event name:		Tax Rate:		
	Event date:				
Item	Budgeted Amount	Amount Per Person	Total Estimate	Actual Amount	Comments
Revenue			\$0.00		
Ticket Sales			\$0.00		
Sponsors			\$0.00		
Partners			\$0.00		
Expenses			\$0.00		
Insurance			\$0.00		
Licensing (alcohol, etc.)			\$0.00		
Permits			\$0.00		
Venue or Room Rental			\$0.00		
Parking			\$0.00		
Security			\$0.00		
Meals			\$0.00		
Food and Beverages			\$0.00		
Alcohol			\$0.00		
Service Charge/Gratuities			\$0.00		
Bartender Labor Costs			\$0.00		
Room Setup			\$0.00		
Rental			\$0.00		
Refreshments			\$0.00		
Set Design/Props			\$0.00		
Projector			\$0.00		
Computers			\$0.00		
Risers/Podium			\$0.00		
Flower, drapery, and fabric			\$0.00		
Lighting			\$0.00		
Audio equipment			\$0.00		
Audio-visual equipment			\$0.00		
Entertainment			\$0.00		
Power			\$0.00		
Entrance Area/Reception Fees			\$0.00		
Setup/Tear Down			\$0.00		
Table Accessories			\$0.00		
Speakers/Entertainers/MC			\$0.00		
Meals			\$0.00		
Accommodation			\$0.00		
Transportation (incl. mileage)			\$0.00		
Staffing Costs			\$0.00		
Event Management Staff			\$0.00		
Production/Technical Staff			\$0.00		
Tradespeople (Carpenters, electricians, etc.)			\$0.00		
General Event Labor			\$0.00		
Delivery Costs			\$0.00		
Union Dues			\$0.00		
Crew Costs			\$0.00		
Meals			\$0.00		
Accommodations			\$0.00		
Miscellaneous			\$0.00		
Parking			\$0.00		
Event Management Fee			\$0.00		
Estimated Summary of Expenses (before tax)			\$0.00		
Tax Amount			\$0.00		
Contingency Fund			\$0.00		
Total estimated expenses					

Getting Strict About the Budget

Budgets are a critical piece of event planning. If you wish to build credibility as an event coordinator and be asked to be involved in future events, you must respect and stick to the budget that gets approved.

You cannot go over budget under any circumstances, which sometimes means that you have to eliminate some aspects of your plan. This is similar to budget reductions at home: you might have to give up something that you thought was really important, but you cannot have it all.

Test Your Knowledge

How will you manage budget shortfalls?

In the example in the pre-assignment, imagine that your budget is cut by 15%. What, and how, do you cut?

Further Reading:

- ✓ *Event Planning, By Judy Allen,(2011)*
- ✓ *Event Planning, By Laurence Carter,(2007)*