

Event Planning 101

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Philosophy

First Experiences

Throughout our life, we have had “first experiences.” The first time riding a bike without help. First movie. First kiss. First time leaving home. First home.

Some are positive and some are negative. Chances are, they have colored our experiences since then, will color future experiences, and stir feelings that can range from excitement to anxiety. In thinking of first experiences, three words come to mind:

Powerful – they set the precedent for things to come

Opportunity – they open up a facet of our world previously unknown

Responsibility – respecting the opportunity while creating the possibility to provide a positive experience.

The Element of Surprise

In the past few years, the corporate world has been talking about the new “experience-based” economy. This has transitioned from a product-based economy (think of all those 1950 commercials about quality) to a service-oriented economy in the 1980’s (think Nordstrom shoes) to our current experience-based economy (think Disney empire, Target).

In today’s multi-media landscape, it is important to provide people with two things: An experience that exceeds their expectations and creates an environment of openness. Think of a customer service experience in which you were treated better than you expected...

Shifting perceptions: in shifting their perspective, we open up people to new information....it keeps them excited, and tricks them out of their cynicism.

The Element of Play

Think of some events you have been to that included playful elements. Bridal showers. Birthday parties. We spend enough time in our heads, dealing with major issues, with our neighborhoods, with frustrations. By using fun, playful elements, we provide people with a brief escape that opens them up to a new experience and allows them to focus on our goals.

The Opportunity to Market/Brand

It is essential to view all events as marketing opportunities, as they offer a unique venue to communicate our mission. They offer an experiential vehicle to get our message across in a way that is “outside” of how people expect it to be communicated (brochures, etc.)....think of the kiosks at the Lights On! event...

Determining your Goal

Events are held with a goal in mind. The following areas – who, what, when, where & why – will guide you in determining the reason for the event as well as the outcomes you are looking for. It takes a lot of resources (time, energy, money) to execute an event – examining the following areas will help focus your event to most effectively maximize these resources.

Who (audience) – are you ultimately trying to reach, lure, honor, convince, or cultivate a relationship with?

What are the demographics of your target audience?

What is the age range? Gender?

Economic status?

Level of Responsibility?

What (message) – are you attempting to convey?

Celebration or Commemorative Event?

Press Event?

Training Experience?

Advocating for a certain issue?

A night of fun with the goal of fundraising?

When (date & time) -- is it most timely to do this?

Time of year connected to the issue?

Other events around that time?

Weekend vs. Weekday/night?

How often is it feasible to have the event?

Where (location) – are the “who’s” that are interested in your “what?”

Accessible – public transportation? Parking? Centrally located?

Venue that reflects your goal – Glamour? Professional? Academic? Stately?

Cost – place that is affordable and builds in a minimal amount of cost.

Why (purpose) – is an event needed to reach your goal?

Visibility?

Your constituents expect it?

The occasion calls for it?

Determining Your Calendar & Timeline

There are no hard and fast rules about how much time it takes to plan an event, or how long before the event the planning should begin, except that the shorter the time to plan, the increase in stress and possibility of error. At the end of this packet are three different timelines for three different types/sizes of event.

Premature anticipation: It is always better to plan too far in advance than too soon before the event. It is a wonderful experience to feel the relief of having everything planned, with time to spare to double-check everything.

Size Does Matter: In general, the larger the event, the more time is needed to plan. If committees are involved in the planning, more time will be needed to coordinate the various committees involved.

Venues we love too much: Venues book up far in advance, especially those that offer discounts to non-profit organizations. Remember, you are competing with hundreds of non-profits, dozens of conventions, and thousands of brides – with only 52 weeks (and weekends) per year.

Creating a Legacy

The Binder

Putting together an event binder creates a “bible” that organizes information and gathers information for successive years’ events. It also provides a directory of information to reference should the primary person be out of the office. On site, it contains information, agreements, and phone numbers for troubleshooting and keeping vendors accountable.

Here are some suggested “tabs” to include, based on the information needed for your event:

Meeting Notes	Vendors	Press/PR
Communications/Correspondence	Printing/Décor	RSVP list
Logistics/Permits/Contracts	Speakers/VIP's	Program

Starting to Plan

Selling Yourself

Events are marketing vehicles for visibility, communicating your message to others, and the opportunity to have a “captive audience.”

- ③ Don't be afraid of your message; but don't get lost in it
- ③ The opportunity for people to give and be a part of the mission
- ③ The opportunity to extend your brand to the community

Budget, Budget, Budget!

A budget sets parameters for your event elements. It is important to determine what is the total cost of the event and to divide this amount into each of the event line items. If applicable, set goals for fundraising opportunities (underwriting, silent auction, ticket sales, etc.) Costs will change, estimates will be wrong, hidden costs will emerge – and having a budget will help you respond to these potential changes as well as give you some negotiating power with your vendors.

Developing a Theme

What just went through your mind when you read/heard this subject heading? Themes spark the imaginations of those planning the event as well as those in attendance. It drives each of your event elements, and ultimately will communicate your goal. Ideally, the theme will be general enough to awake people's wonder and curiosity, which will also give you some “room to play” in putting the event together.

Plan, Plan, Plan

- ③ Setting up overall timeline
- ③ Setting up committees and delegating tasks
- ③ Location – site visit, walk through
- ③ Logistics – flow, movement
- ③ Décor – sight, sound, smell, touch, taste
- ③ “Day-of” Timeline – from start to finish (vendor arrivals, deliveries, etc.)
- ③ Program – to the minute (max 15 - 30 minutes)
- ③ Menu – appropriate to audience, price of ticket, paced during event
- ③ Attendance – tickets, participation, RSVP's

Getting the Word Out

Throughout the planning process, there are opportunities to get the word out about the event. This is especially important for those attending the event.

- ③ Save the Date – ten to twelve weeks prior to the event
- ③ Invitations – around six weeks before the event (RSVP should be approx. 2 weeks prior to the event to allow for call-backs of prospective invitees if needed)
- ③ Press Releases – before the event to generate excitement, after the event to communicate your success.
- ③ Advertisements – this is probably the least effective outside of events that are for the general public.

The Giveaway

A wonderful part of the planning is deciding what to give to your guests! The giveaway accomplishes two goals: it shows gratitude to your guests and creates a built-in reminder that perpetuates your goal.

Thank You Correspondence

- | | |
|-------------------------|-----------|
| - Committee & Co-chairs | - Guests |
| - Donors | - Vendors |

Event Coordination

The Producer

- ③ The person on-site that has it all in their head, releases VIP's be very important.
- ③ Greets and orients vendors.
- ③ Is there way before and after to ensure easy start and tidy wrap-up.
- ③ Assign who to relay difficulties to

Staff/Volunteer Assignments

- ③ Job descriptions
- ③ Orientation meeting prior to event
- ③ Taking care of them on-site
- ③ Debriefing celebration afterwards

The Art of Negotiating

Start with a good relationship.

Let everyone know that you are a nonprofit up front, and know how you'll talk to them about the mission (organization and event).

The more you're spending, the more power you have.

Don't be afraid to ask questions – hardly anything is set in stone.

Some donations can be used for their charitable purposes.

Thank you, thank you, thank you...

Resources

Catering:

- Food on-site vs. Caterer
- Pick someone you know
- Service, service, service
- Daniel's favorites
 - Blue Plate Catering
 - Rita's Catering & Events

Décor, Giveaway, etc.

- Doolin's (décor, plastic table cloths on a roll)
- Superior Foamboards Corporation (foam boards for mounting, kiosks)
- I've Been to a Marvelous Party
- M.K. Brodie (West Randolph)
- Uncle Fun's (Belmont & Southport)
- Party City (décor, some giveaways)
- Total Promotions (incentives, giveaways)
- Card & Party Outlets (décor, some giveaways)

Picking a site for your Event:

- Chicago Special Occasions Sourcebook
- Chicago Convention & Tourism Bureau
- Special Event sites, calendar, hotel & convention information
- www.chicago.il.org

Event Planner's Tool Box (A - Z, kinda)

A creative mind

Black Magic Marker

Cash

Double-stick tape (thick and thin)

Duct tape (of many colors if possible)

Electrical Tape

Florist Wire

Glue Stick

Handy list of phone numbers for vendors, entertainers, volunteers, etc.

Inspiration to pass on to volunteers, staff helping, etc.

Lots of Water

Matches

Measuring Tape

Paper Clips

Pins

Pliers

Post-it notes

Power Bars

Scissors

Screwdrivers (flat nosed and phillips)

Twistie Ties (long, green if possible)

Utility knife

Volunteer descriptions and assignments

Waste receptacle

X-tra Energy

Your Event Binder

Zip ties

Donor Cultivation

Events offer a unique opportunity for donor cultivation:

- Expanding the circle of people who support the organization through event committees, honorary committees, on-site volunteers, etc.
- The positive peer pressure of having a successful event drives involvement
- They offer an overt, less threatening atmosphere for both donors and your Board, committee, staff, etc. to interact and ask for contributions through the event elements
- “Friend-raising” by having time to introduce potential donors to Boards, staff and programs they are interested in.
- Great opportunity to add more names to your individual giving programs.

Before the Event

- Ask Board members, Gala Committee, staff etc. for names to add to your mailing list. Give them previous lists they submitted to make sure information is correct, that sending an invite is still appropriate, etc.
- Provide these groups with regular updates on the RSVP list so that they can keep in mind which of their contacts are attending, as well as drum up excitement if they see those contacts before the event.
- Give information/training to these groups on how to look at their RSVP list – identify who might be a potential: Board member, next year committee volunteer, donor (cash or in-kind). Who do they need to meet while there? Encourage connections not only with high level staff but other Board members, “front-line” staff, etc.

At the Event

- Greet, meet, network, introduce, get donors’ questions answered – don’t depend on the spoken program to be the only way they get information about the organization.

After the Event

- Organization sends thank you soon after.
- Ask contact providers to follow-up with phone, email, note, or the next time they see contacts who attended.
- Ask those that had contacts attend: how do you think we can keep them involved?