

Workshop Outline: Event Planning – Coordination, Level 2

Workshop Objectives:

By the end of this workshop, everyone should:

- Have a strong understanding of all the elements you need to think about and feel comfortable in taking a lead in event planning
- Have 'planned' for a real or imaginary upcoming event
- Return to their project with a strong understanding of how to minimize environmental impacts of events and maximize positive social impacts

Audience:

- 15 – 35 participants, post-secondary or high school level
- Different experience levels!
- Hands on – no powerpoint!!

Total Time: 90 minutes

Materials:

- Scenarios on separate sheets of paper
- Flip charts
- Markers
- Tape
- Scrap paper for each person
- Pens for each person
- Elements of Event Planning – on flip chart or handout
- Budget handout

Workshop Introduction: (5 minutes)

- Share the goals of the workshop and topics covered

Activity 1: Speed planning: (20 minutes)

Purpose: to get people thinking quickly about possible scenarios and coming up with interesting solutions for event planning (based on speed dating)

1. Distribute the Speed Planning Scenarios among participants (see Appendix 6).
2. Bringing everyone back together, have everyone find a 'date' and form 2 concentric circles, with one partner in the inner circle, and one in the outer (see diagram).
3. Give each person a 'scenario' (see list below) and the following instructions:

4. Each date will have the chance to read their partner their scenario, and hear what their date has to offer in the way of suggestions or solutions
5. After 1 minute, the outer circle will rotate clockwise and have a new date!
6. All ideas will be written down - if you already have the idea your new date has proposed, your date can either build on the idea, or try another idea. Keep note of the things you could have done ahead of time to avoid these situations!

Information: (15 minutes)

Go through Elements of Event Planning worksheet (see Appendix 1), focusing on:

- Timelines (handout with examples)
- Budget (handout with examples)
 - Definition of “in-kind”
 - Approaching funders
 - Definition of “billeting”
- Follow up
 - Making the most out of your event

Activity 2: Planning the real deal. (total: 40 minutes)

1. Everyone breaks back into groups (up to 8 people per group): Try and group people that will be working on events together in the future.
2. Everyone picks an event they will be mock planning
3. As a group, think through: (15 minutes)
 - i. What are the goals of the event? What will you accomplish/what are the outcomes?
 - ii. Who is your audience? If there are specific outcomes, who NEEDS to be there in order for this to be a success? How many people will you aim for?
 - iii. What will the event look like?
 - iv. What is the broad timeline?
4. Break into pairs. Each set of pairs will take a set of programming areas: (see Elements of Event planning for guidance) (15-20 minutes)
 - i. Logistics and Volunteers
 - ii. Funding and Food
 - iii. Programming and Participant Travel/Accommodation
 - iv. Outreach/Advertizing and Follow up

Wrap Up (10 minutes)

- Report back from previous exercise

See Appendices Below for Handouts

Appendix 1: Elements of Event Planning (as a handout/flip chart – ask if there is anything to add?)

1. Goal, vision, objectives, timeline
 - Fundraiser? Engagement? Education?
 - Who's the audience?
 - How long will it take to plan?
2. Logistics
 - Venue – is appropriate, will people be able to find it?
 - Time
 - AV equipment
 - Registration
3. Volunteers
 - How to recruit them
 - Task list
 - Delegation
 - Appreciation
4. Funding
 - Budget
 - Cost to participants
 - Approaching potential Funders
5. Food, refreshments
 - Catering? Home-made? Fancy? Casual?
 - How many people?
 - Allergies/dietary norms?
6. Programming
 - Guest speakers
 - Honorarium
 - Gifts, thanks you
7. Advertizing/outreach
 - Mass outreach? Targeted?
 - Personal Invitations
 - Media
 - Creating long-term avenues for waste-free advertizing
8. Travel and Accommodation
 - Billeting? Hotels? Residences?
 - Carpools? Flying? Bussing?
 - Reimbursement process
9. Follow up
 - Does this event provide clear ways for people to get involved afterwards?
 - Is there a tangible output of the event?
 - How have you measured the success of the event?

Appendix 2: Example Timeline

	Week T-3	Week T-2	Week T-1	CONFERENCE
Keynote speakers	Confirm all keynotes	Jan 5th - bios for all speakers and blurbs on their presentation	Confirm travel arrangements	Welcome Volunteers, ensure they have everything they need
Workshop speakers	Finalized speakers	Blurbs and Bios in	Travel arrangements done	
Agenda	Finalize content	Blurbs and bios added	Distribution of agenda	Ready at the registration table
Budget	Research costs, start fundraising, look into sponsors	Budget Due, develop funding proposal		
Registration	Create online registration	Confirm registration and send participant package	Registration deadline	
Promotional Materials	Letter for participants drafted; Invite for student union and professors			
Social/entertainment		Ideas solidified, band booked	Details with band sorted out	
Food	Menu created, budget confirmed	Check allergies	Purchase all ingredients	
Travel	Bursary amount decided in budget	Travel for participants confirmed as they register	Reimbursement forms printed	Collect receipts and reimbursement forms
Rooms/Equipment	Number of participants anticipated	Book rooms	Confirm AV equipment	

Appendix 3: Plan your own Timeline

	Week T-4	Week T-3	Week T-2	Week T-1	CONFERENCE
Keynote speakers					
Workshop speakers					
Agenda					
Budget					
Registration					
Promotional Materials					
Social/ entertainment					
Food					
Travel					
Rooms/ Equipment					
Other					

Appendix 4: Example Budget

BC Sustainable Campuses Conference Budget			
Figure 1: Expenditures			
Expenditures by Budget Item	Cost (In-Kind)	Cost (Cash)	Total Cost
Meals and Catering			
Conference Meals		\$ 3,780	\$ 3,780
Catering for Pre-Conference Climate Action Session		\$ 1,856	\$ 1,856
Transportation			
Transportation for Participants		\$ 2,820	\$ 2,820
Accommodation			
Accommodation for Speakers		\$ 125	\$ 125
Accommodation for Students (community billets)	\$ 2,000		\$ 2,000
Bursaries			
Travel Bursaries for Students		\$ 400	\$ 400
Conference Fee Bursaries for TRU students		\$ 1,500	\$ 1,500
Logistics			
Speaker Fees and Gifts	\$ 545	\$ 760	\$ 1,305
Room Booking Fees	\$ 900	\$ 420	\$ 1,320
Printing Costs	\$ 110	\$ 33	\$ 143
Miscellaneous Costs		\$ 1,652	# \$ 1,652
Human Resources			
Salaries and Wages	\$ 1,750		\$ 1,750
Volunteer Hours	\$ 5,150		\$ 5,150
Conference 2009		\$ 4,924	\$ 4,924
Total Estimated Costs		\$ 10,455	\$ 18,270

Figure 2: Revenue			
Revenue/Contributions	Confirmed	Confirmed	Total
<i>All potential revenue sources have been contacted</i>	(In-Kind)	(Cash)	Confirmed
Thompson Rivers University			
TRU Comprehensive University Enhancement Fund		\$ 2,500	\$ 2,500
TRU Administration	\$ 900	\$ 2,000	\$ 2,900
Kamloops Community			
City of Kamloops		\$ 750	\$ 750
Business Donations	\$ 360		\$ 360
Community Billets	\$ 2,000		\$ 2,000
Volunteer Contribution	\$ 5,150		\$ 5,150
Government Sources			
Ministry of Advanced Education		\$ 5,000	\$ 5,000
BC Climate Action Secretariat		\$ 4,826	\$ 4,826
Ministry of Environment	\$ 185		\$ 185
Conference Fees			
Registration fees and Donations		\$ 2,694	\$ 2,694
Other Revenue Sources			
Council of Canadians		\$ 500	\$ 500
Canadian Federation of Students	\$ 110		\$ 110
Sierra Youth Coalition	\$ 1,750		\$ 1,750
Total	\$ 10,455	\$ 18,270	\$ 28,725

Appendix 5: Plan your own budget:

Figure 1: Expenditures					
Expenditures by Budget Item	Anticipated: Cash	Anticipated: In-Kind	Actual: In-Kind	Actual: (Cash)	Total Cost
Meals and Catering					
Conference Meals					
Transportation					
Transportation for Participants/Speakers					
Accommodation					
Accommodation for Speakers					
Accommodation for Students					
Bursaries					
Travel/Registration Bursaries					
Logistics					
Speaker Fees and Gifts					
Room Booking Fees					
Printing Costs					
Miscellaneous Costs					
Human Resources					
Salaries and Wages/Volunteer Hours					
Other Expenditures					
Total Estimated Costs	\$	\$	\$	\$	\$

Figure 2: Revenue					
Revenue/Contributions	Anticipated: In-Kind	Anticipated: Cash	Confirmed: In-Kind	Confirmed: Cash	Total Confirmed
<i>All potential revenue sources have been contacted</i>					
University/College					
Community (incl. volunteer contribution)					
Government Sources					
Conference Fees					
Other Revenue Sources					
Total		\$	\$		\$

Appendix 6: Speed Planning Scenarios

<p style="text-align: center;">FOOD 1</p> <p style="text-align: center;">The campus catering is too expensive for a multi-stakeholder lunch meeting</p>	<p style="text-align: center;">FOOD 2</p> <p style="text-align: center;">You're having a pancake breakfast fundraiser for 75 people but you don't want to use disposable plates or cutlery</p>
<p style="text-align: center;">FOOD 3</p> <p style="text-align: center;">You're having a dinner for 30 people in October, want your meal to be 100 mile diet</p>	<p style="text-align: center;">FOOD 4</p> <p style="text-align: center;">You want to buy as much organic as possible but you have a limited budget</p>
<p style="text-align: center;">LOGISTICS 1</p> <p style="text-align: center;">Two weeks before the event, you find out the social justice centre is planning a separate event at the same time as yours</p>	<p style="text-align: center;">LOGISTICS 2</p> <p style="text-align: center;">You're planning an outdoor concert; what's your back-up plan for rain</p>
<p style="text-align: center;">LOGISTICS 3</p> <p style="text-align: center;">You are trying to plan a low-emissions event, but your speaker shows up with a power-point, and you don't have the equipment</p>	<p style="text-align: center;">LOGISTICS 4</p> <p style="text-align: center;">You want to let people register at the last minute, but you want to have a rough idea of numbers 2 weeks in advance to plan for food.</p>

<p style="text-align: center;">LOGISTICS 5</p> <p style="text-align: center;">You have 15 people coming in from out of town, but you have no budget to pay for accommodations</p>	<p style="text-align: center;">LOGISTICS 6</p> <p style="text-align: center;">You're having a late-night social fundraiser and you want to be respectful of the neighbours</p>
<p style="text-align: center;">VOLUNTEERS 1</p> <p style="text-align: center;">You have tons of people who want to volunteer but who don't have event planning experience</p>	<p style="text-align: center;">VOLUNTEERS 2</p> <p style="text-align: center;">You're taking a lead on a roundtable discussion involving campus stakeholders and community members – what roles can you delegate to volunteers</p>
<p style="text-align: center;">VOLUNTEERS 3</p> <p style="text-align: center;">You have a lot of volunteers who want to help on the day of the sustainability conference, but not many who can help in the lead up planning</p>	<p style="text-align: center;">VOLUNTEERS 4</p> <p style="text-align: center;">You have 25 volunteers show up to the first meeting for the upcoming fundraiser gala. The conversation keeps going on tangents and nothing is getting done.</p>
<p style="text-align: center;">FUNDING 1</p> <p style="text-align: center;">To cover the costs of the event, tickets need to be at least \$30, but you don't want to create a barrier for people who may not be able to afford it</p>	<p style="text-align: center;">FUNDING 2</p> <p style="text-align: center;">One of your major funders backed out at the last minute</p>

<p style="text-align: center;">FUNDING 3</p> <p style="text-align: center;">You need a lot of funding for your big sustainability fair, and you don't want to have any corporate sponsorship</p>	<p style="text-align: center;">FUNDING 4</p> <p style="text-align: center;">You have a limited food budget based on the idea that many of the meals would be made by volunteers, but find out that you're not allowed home-made meals because of health regulations</p>
<p style="text-align: center;">PROGRAMMING 1</p> <p style="text-align: center;">You want some big name speakers in order to attract a crowd, but you don't want to fly people in from far away</p>	<p style="text-align: center;">PROGRAMMING 2</p> <p style="text-align: center;">You have a guest speaker lined up but find out 2 weeks before the event that they are requesting an \$800 honorarium</p>
<p style="text-align: center;">PROGRAMMING 3</p> <p style="text-align: center;">You're holding educational event on climate change and want to attract a crowd that doesn't usually come out for these types of events</p>	<p style="text-align: center;">PROGRAMMING 4</p> <p style="text-align: center;">You're holding an educational event that will generate a lot of enthusiasm, but want to keep people engaged after the event</p>
<p style="text-align: center;">OUTREACH 1</p> <p style="text-align: center;">You want a waste-free advertizing campaign</p>	<p style="text-align: center;">OUTREACH 2</p> <p style="text-align: center;">You've heard from a lot of people that they're overloaded on emails, and want to move away from internet-based advertizing</p>

OUTREACH 3

You want to invite the well-known (and busy) professors to an education roundtable

OUTREACH 4

You want to get people to attend from other schools, but you don't already have contacts at these schools