

# EVENT PLANNING PROCEDURES



This document is provided as a supplement to the Event Planning and Protocol Guide.

Please refer to the following CCSD policies, regulations, and guidelines for further guidance on events and related activities:

- Fundraising Rules [http://ccsd.net/district/policies-regulations/pdf/1223\\_R.pdf](http://ccsd.net/district/policies-regulations/pdf/1223_R.pdf) and [http://ccsd.net/district/policies-regulations/pdf/5132.2\\_R.pdf](http://ccsd.net/district/policies-regulations/pdf/5132.2_R.pdf)
- Food and Beverage and Offsite Facility Rentals [http://ccsd.net/district/policies-regulations/pdf/3317\\_R.pdf](http://ccsd.net/district/policies-regulations/pdf/3317_R.pdf)
- School Group Participation in Public Events [http://ccsd.net/district/policies-regulations/pdf/1221\\_R.pdf](http://ccsd.net/district/policies-regulations/pdf/1221_R.pdf)
- Principals' Handbook (Instruction Unit icon on InterAct)

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## **Develop Event Objectives**

The first step of event planning is to establish specific objectives (e.g., *why are you organizing this event and what do you hope to achieve?*).

When you set your initial event objectives, you should also consider how you will evaluate the event to determine your success. For instance, if the objective of your event is to raise awareness, you'll have to benchmark and gather data on online social media activity/mentions, offline publicity, etc. based on your initial goals.

Plan to hold a post-event meeting with the team who planned the event and solicit feedback from guests if possible. Evaluate what worked and what did not, review the budget, assess whether objective(s) was achieved, and identify best practices to help you plan future events.

## **Organize a Team**

No matter the size, a special event takes a concerted team effort to handle all of the details. Where possible, the Trustee(s) involved with the school and/or activity should be invited to participate on the planning committee. Depending on the type and scope of your event, you may consider identifying an Event Manager or Event Chair as well as individual Chairpersons for subcommittees, such as:

- Venue, logistics & catering management (selection, contracts, permits, insurance, etc.)
- Guest management (invitations, RSVPs, greeters, registration, seating arrangements, etc.)
- Speakers/presenters (selecting, confirming, logistics, management, etc.)
- Activities/entertainment
- Publicity/promotion (Web presence, events calendars, printed programs, media relations, signage, social media, etc.)
- Sponsor/partner management
- Transportation (if providing transport for guests, students, etc.)
- Volunteer management

## **Create a Master Plan**

Work as a committee to create a master plan and event outline, incorporating all of the potential areas identified above. This plan will be used to manage the work being done and an outline of just the key details can be used to inform stakeholders as needed.

Create a run-of-show document if needed, outlining the expected timing and any requirements for each session or activity, including required setup, starting and ending times, staging directions, presenter/lead, audiovisual and production needs, etc.

Example documents are provided on the [Event Planning and Protocol Web page](#) to help you get started.

## **Establish a Budget**

Identify the available budget for your event, including internal and external sources for each of the potential expenses as part of the master plan. Create a balance sheet listing expenses for all functional areas of your meeting or event, and determine which expenses will be assumed by the host, potential sponsors, and/or by the attendees (fee).

If you are hosting a revenue-generating (fundraising) event, you will want to identify your break-even point (the point at which the revenue generated at the event is sufficient to cover the expenses of hosting the event).

Budget items to consider:

- Staff time
- Marketing expenses (design fees, printing, postage, etc.)
- Transportation
- Venue
- Guest accommodations (if applicable)
- Food and beverage
- Entertainment and recreation
- Audiovisual equipment and production costs
- Security (CCSD School Police, etc.)
- Special needs (interpreters, etc.)
- Taxes and gratuities, service charges, etc.
- Contingency fund for unanticipated, last minute expenses.

## Determine Venue/Location

When planning an event it is important to be aware of how to create an event that is open and accessible to everyone. This can include finding a space that is safe and considerate of a wide range of abilities and considering visual, hearing, and physical accessibility to meeting areas and facilities.

No facility will look the same in-person as it does on paper, nor will you be able to get a sense of service without going to the site. If time allows, plan to visit the site and take pictures to help you block out the location of key items (catering, check-in table, seating arrangements, podium location, parking, etc.).

When determining the best location for your event, and planning the budget, considering the following factors:

- Accommodation of guests – consider the size of the group, gender mix, ages of attendees, and any special needs.
- Possible venue fees.
- Convenient location based on where the majority of your guests will be traveling from.
  - If the event involves out-of-town guests, consider travel time and cost to reach a destination, and a site near air and/or ground transportation.
- Be sure to build in ample set-up and clean-up time to your request.
- Consider weather, especially if considering an outdoor venue.
- Security (needed? If so, how much and for how long?)
- Parking availability (including designated parking for Trustees and other VIPs)
- Audiovisual needs – be aware that not all rooms are equipped with sound systems, nor do all sessions need sound. A/V support often comes at additional cost to the venue rental fee. Determine which rooms need sound and which can be used with the systems in place.

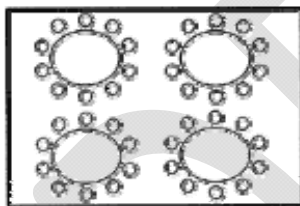
Consider the following potential A/V needs:

- Sound system
- Projector
- Screen (be sure to understand screen size – square or rectangle – in order to prepare PowerPoint presentation in appropriate 16:9 or 4:3 format)
- Microphone (podium mic, standing mic, handheld, lavalier, etc.)
- Internet connection (for accessing YouTube or other online content)
- Laptop (provided by facility vs. bring your own to connect to their system)
- DJ and/or pre- post-meeting music (also consider the playlist to ensure the appropriate tone for the event)
- Consider your potential facility needs as well:
  - Podiums
  - Staging/Risers
  - Stairs – such as from audience up to stage
  - Dance Floor
  - Generators – may have additional cost for gas depending on length of use

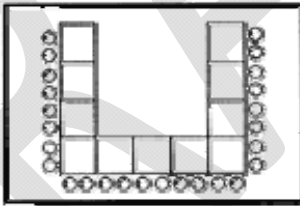
- Spider boxes (power)
- Extension cords
- Curtains
- Easels
- Flags (U.S., State, etc.)
- Etc.

There are many meeting room configurations to consider as well:

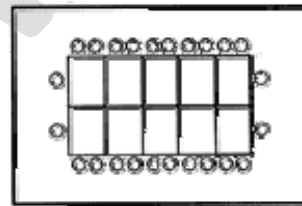
- *Theater*: Appropriate for large events and lectures that do not require extensive note taking. This is a convenient setup to use before breaking into discussion or role-playing groups because chairs can be moved.
- *Classroom*: The most desirable setup for medium to large-size lectures. This configuration requires a relatively large room. Tables provide attendees with space for spreading out materials and taking notes.
- *U-shape, E-shape, and T-shape*: Appropriate for groups of fewer than 40 people. These are best for interaction with a leader seated at the head of the setup. Audiovisual equipment is usually set up at the open end of the seating.
- *Conference and Hollow Square*: Appropriate for interactive discussions and note-taking sessions for fewer than 25 people.
- *Banquet Ovals and Rounds*: Generally used for meals and sessions involving small group discussions. A five-foot-round table seats eight people comfortably. A six-foot-round table seats 10 people comfortably.



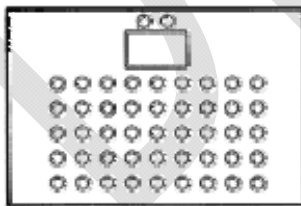
*Banquet Style*



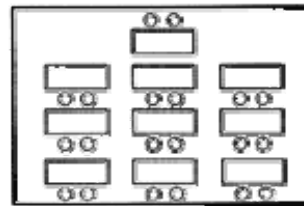
*U-Shape Style*



*Conference Style*



*Theatre Style*



*Classroom Style*

There are costs affiliated with most of the above venue services, so inquire about expenses and ensure that you have budgeted for all of your event needs.

## Set a Date

Consider the following factors before selecting an event date:

- Give yourself enough time. Ideally, you should have 4-6 months to plan (depending on the nature of your event).
- If your event will involve CCSD senior leadership and/or the Board of School Trustees, be aware of scheduled Board activities <http://ccsd.net/trustees/>.
- Check availability with key participants – e.g., speakers, presenters, VIP guests, etc.
  - Office of the Superintendent 702/799-5311
  - Board Office 702/799-1072
- Check availability of internal meeting room or external venue.
- Be aware of statutory and religious holidays <http://www.interfaithcalendar.org/>.
- Avoid school holiday time periods (e.g., winter, spring and summer holidays) and other school events <http://ccsd.net/district/calendar/>.
- If a school event, also avoid major school activities, such as sports, proms, etc.

## Create a Planning Timeline

Refer to the event planning timeline examples provided on Page 10 to determine the appropriate schedule of activities leading up to your event.

## Theme Your Event

Choose a timely and compelling theme to complement your event objectives, and then plan as many elements as possible around the theme for a fun and memorable event.

- *Brainstorm names.* When you are brainstorming the event name, think about:
  - How is your event different from other events?
  - What are you hoping to convey through this event?
  - What name would attract the most attention and be most memorable?
  - As short a name as possible will be easiest to communicate.
  - Ensure event name/theme is appropriate for school and/or CCSD.
- *Design promotional materials.* Create a specific look and feel to represent your event:
  - A graphic icon can be an effective tool for publicity and promotional items (e.g., invitations, Web page, t-shirts, giveaway items, etc.).
  - Develop a consistent set of materials that all tie-in to the overall look and feel of the event (invitation, Web page, PowerPoint template, posters, directional signage, etc.).
  - Consider what is appropriate, what is readable, etc.
  - Be careful of copyright infringement.
  - The CCSD Graphic Arts Center can be of assistance to you as needed <http://graphics.ccsd.net/>.

- *Incorporate theme in your event.* Consider other elements of the event that can be tied to the overall theme:
  - Catering (themed food choices, fun food names)
  - Types of speakers/presentations/entertainment
  - Decorations/decor
  - Etc.

### **Identify and Establish Partnerships & Sponsors**

Consider whether there are organizations that you could partner with or call on for sponsorships to defray the costs and increase potential participation. When you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success.

You may want to consider:

- Seeking corporate sponsors to fund a portion of the event. This can range from large to small local businesses that might be able to provide goods or services, such as catering, flowers for the tables, raffle prizes, etc.
- Partnering with community organizations that might be able to offer a venue and/or assistance with organizing or staffing an event.
- Soliciting donations/sponsorships from key individuals involved with the school, such as the namesake, PTA/PTO committee, etc.

Once partners/sponsors are identified, you will need to ensure they receive recognition as appropriate in event materials and at the event. Think about how you can give them value in return for their donation. Recognition can be tiered based on levels of funding/involvement, such as Platinum, Gold, and Silver partners.

## Plan Meals and Refreshments

- Plans refreshments to fit with the theme and nature of your event, where possible.
- At events offering food and beverage service, allow enough time for guests to eat leisurely, network, or socialize with colleagues or friends and family, and enjoy all presentations or ceremonies, if there are any involved. Consider starting food service one-hour prior to the start of the event, and advertise the “doors open” time.
- Generally allow 30 to 40 minutes for breakfast, 45 to 60 minutes for lunch, and 20 minutes per course for dinner. For refreshment breaks, allow a minimum of 15 minutes for up to 100 people, 30 minutes for up to 1,000 people and 30 to 45 minutes for groups larger than 1,000.
- Ensure an adequate supply of water for guests, even if no other refreshments will be served.
- Plan on two cups of coffee or tea per person for a morning break and one cup of coffee/tea or one soda per person during an afternoon break.
- Consider a buffet set-up for informal events. Buffets offer variety and faster service.
- Consider food items for guests with special needs (e.g., gluten-free options).
- Consider donating leftover food to homeless shelters or distribution organizations for the needy.

## Create a Communications Plan

If you have ample lead time, effective planning, creativity, and willing volunteers or staff, you can promote your event with little or no cost.

Even with the most amazing speaker or entertainment line-up, you will need to promote your event to get people in the door. Event promotion may include:

- Invitations
- Web site story and/or banner (School and/or CCSD as appropriate)
- Newsletter/enewsletter
- Email announcement(s)
- Flyers/posters
- Direct mail
- Social media (Facebook, Twitter, LinkedIn, Instagram, YouTube, Flickr, etc.)
- Registering on a variety of online calendars, such as City, Chamber of Commerce, Rotary Club, etc.

Submit the [Communications Support Form](#) to request support from CCSD Communications with districtwide CCSD Web announcements, social media, media relations, etc.

When advertising events, help participants feel welcome by including the following phrase to allow individuals to contact you if special accommodations are required:

“If you require specific accommodations for this event please contact [contact info].”



## Launch Post-Event Publicity Plan

No plan is complete without post-event thank-you messages, sponsor acknowledgements, and even press or newsletter articles about the event's key messages and/or fundraising success. Ensure the readers or visitors to your Web site viewing post-event materials have an opportunity to:

- Learn more about the event – especially if it is an annual affair
- Contribute funds – either to the specific event-related cause, the school or CCSD
- Receive information about upcoming events and/or volunteer opportunities.

Create materials for the media as appropriate, including select photos, video B-roll, and a press release detailing the outcome(s) of the event. You should highlight Trustees, CCSD leaders, and other VIPs in attendance.

People love to see themselves in photos, so be sure to offer captions and identify event attendees or award winners, etc. *Remember to get permission to use photos and identify those in them.* You may also consider ordering prints of select shots to include in VIP thank you notes.

Post-event publicity opportunities will depend on the nature of your event, but here are a few examples of some basic post-event publicity activities:

- Include post-event stories and photos in:
  - Web page(s)
  - Newsletters (CCSD, school, Trustee, etc.)
  - Blog posts
  - Etc.
- Post videos and/or speaker presentation on your Web site and/or social media. Be sure to receive permission from speakers to post their presentations online.
- Fundraising Events:
  - Update your event page to include information on the event's success (did you reach your goal? how much did you raise?) and photos of the event. Be sure to offer opportunities for additional donations - e.g., a link to your fundraising page, etc.
  - Create a news release announcing how much you raised at the event. Remind the reader about the objective for the fundraising event (e.g., if you are raising funds for a specific project – offer the details on what this project will achieve) - don't assume they remember the details from your event press release, so include key points about why you had the event and what you'll do with the funds raised.
  - Consider hosting a post-event announcement event to announce the total funds raised, present an oversized check, etc.
- If you collected contact information through RSVPs or other means (e.g., collecting business cards for a door prize) – be sure to add them to your data base for newsletters or other organizational communications.

## Event Planning Timeline

### High-Level Planning: Four-Six Months Ahead of Event

- Establish event objectives
- Recruit event committee, solicit Trustee representative, select event manager or chair, and establish sub-committee chairs
- Select date
- Identify venue and negotiate details
- Develop event master plan and set theme for the event
- Get cost estimates (e.g., room rental, food & beverage, equipment, speaker fees, travel, etc.) and create a budget
- Create communications plan (ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design and printing coordination, online /social media, etc.)
- Identify and confirm speakers/presenters/entertainers
- Determine sponsorship levels/amounts
- Identify and contact potential sponsors/partners

### Three-Four Months Ahead of Event

- Determine VIPs and create RSVP tracking document (e.g., spreadsheet)
- Speaker/Presenter Liaison:
  - Finalize presentation/speech topics
  - Request bio information, photo
  - Make travel and accommodation arrangements
  - Have Legal review contracts, obtain signatures as appropriate, etc.
- Venue/Logistics:
  - Investigate need for any special permits, licenses, insurance, etc.
  - Determine and arrange all details regarding menu, A/V equipment, facilities, parking, signage, etc.
  - Review security needs/plan for the event with venue manager
- Communications Plan:
  - Request logos from corporate sponsors for online and printed materials
  - Develop draft program
  - Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
  - Work with Communications team on publicity, such as CCSD.net
  - Develop and produce invitations, programs, posters, tickets, etc.
  - Develop media list and prepare media alert/release, backgrounder, and media kit materials (e.g., speaker info, photos, etc.)
  - Create event page on ccsc.net and/or school/department Web site
  - Create social media accounts/pages as needed
  - Consider developing a promotional video for YouTube and Facebook page
  - If you are hosting a public event, consider registering your event on a variety of online event calendars, such as City, Chamber of Commerce, Rotary Club, etc.

### Two Months Prior to Event

- Send reminders to contact list regarding registration/participation
- Presenters/Speakers: e.g.:
  - Confirm travel/accommodation details
  - Request copy of speeches and/or presentations
- Sponsorship: Follow up to confirm sponsorships and underwriting
- Publicity:
  - Release press announcements about keynote speakers, celebrities, VIPs attending, honorees, etc.
  - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

### One-Two Weeks Ahead

- Schedule a meeting for all committee chairs to confirm all details against Master Plan – and ensure back-up plans are developed for any situation (e.g., plans for bad weather, back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
- Finalize event script
- Brief any/all hosts, greeters, volunteers about their event duties and timelines
- Final seating plan, VIP place cards, etc. Ensure that all Trustees that will be in attendance are included in stage seating or in front row reserved seating, as appropriate.
- Provide final RSVP numbers to caterer
- Make print and online copies of any speeches, videos, presentations, etc.
- Determine photo op and interview opportunities with Trustees, CCSD leaders, VIPs, speakers, etc. and confirm details with interviewee(s) and media.

### One Day Ahead

- Confirm media attending
- Ensure all signage is in place
- Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
- Ensure all promotional items, gifts, plaques, trophies, etc. are on-site.

### Event Day

- Appoint someone to arrive early to attend to important event details
- Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- Check-in with each Committee Chair to ensure their team is on track
- Bring water for speakers
- Bring an emergency kit (Kleenex, Band-Aids, safety pins, etc.)

## Post-Event

- Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve
- Conduct a post-event meeting and thorough evaluation of objectives vs. outcomes
- Gather all receipts, documentation, final attendance data, donations, etc. and update budget
- Implement post-publicity plan – thank attendees for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering or making a sustaining donation.
- Send thank-you letters to:
  - Sponsors
  - Volunteers
  - Speakers/presenters
  - Donors
  - Media

*In your thank-you notes, be sure to remind the recipients of the event's success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.).*