Event Planning Guide

Figure 1- Toolbox

Developed by GC Students, a network of the Federal Youth Network (FYN)

Summer 2022 Edition

# Foreword

After more than two years of COVID-19 pandemic restrictions, which saw our world going digital, we are beginning to return to in-person events once again. We are not, however, leaving digital tools behind. Event organizers in the Government of Canada (GoC) now have added flexibility but an additional layer of complexity choosing between the accessibility of an online event and the greater depth of social interactions found in an in-person event.

This guide provides public servants with a basic procedure to organize their own events, either online or in-person. Whether you are an experienced event planner or thinking of organizing your first get-together, the roadmap presented below will help you get started in planning your successful events.

While we strive to make the information presented here accurate and up to date, the fast-changing context of the event-planning world may require you to adapt this guide to your circumstances. Please feel free to adjust this procedure to your needs.

For questions or comments, please reach out to Karl Alary at isc.ncr.rcn.cei@gmail.com.

# Contents

[Foreword 2](#_Toc110419792)

[Contents 3](#_Toc110419793)

[The A-B-C of Event Planning 4](#_Toc110419794)

[1. Conception (Preparatory Work) 5](#_Toc110419795)

[Step 1: Set your Objectives 5](#_Toc110419796)

[Step 2: Determine your target audience 5](#_Toc110419797)

[Step 3: Conduct preparatory work 5](#_Toc110419798)

[In Summary 5](#_Toc110419799)

[2. Planning (Before the Event) 6](#_Toc110419800)

[Step 1: Schedule your Event 6](#_Toc110419801)

[Step 2: Choose a location 6](#_Toc110419802)

[Step 3: Set up Registration 7](#_Toc110419803)

[Step 4: Prepare your Communications 7](#_Toc110419804)

[Step 5: Develop your Marketing Strategy 8](#_Toc110419805)

[Step 6: Manage Possible Risks 8](#_Toc110419806)

[Step 7: Procure Supplies and Services Needed 8](#_Toc110419807)

[Step 8: Manage your Team 9](#_Toc110419808)

[In Summary 9](#_Toc110419809)

[3. Implementation (During the Event) 10](#_Toc110419810)

[Step 1: Handle a Sold Out Event 10](#_Toc110419811)

[Step 2: Manage your Team 10](#_Toc110419812)

[Step 3: Manage Participant 11](#_Toc110419813)

[In Summary 11](#_Toc110419814)

[4. Evaluation (After the Event) 12](#_Toc110419815)

[Step 1: Connect With Your Attendees After the Event 12](#_Toc110419816)

[Step 2: Reconcile Outstanding Accounts 13](#_Toc110419817)

[Step 3: Conduct the Post-Event Assessment 13](#_Toc110419818)

[In Summary 13](#_Toc110419819)

[Looking Ahead 14](#_Toc110419820)

# The A-B-C of Event Planning

Organizing an event is not a single task. It is an ongoing process usually involving multiple stakeholders with different, at times competing, needs that may change throughout the planning process. Your job as an event planner is to handle those competing priorities while making sure the final product forms a cohesive whole that meets your audience’s expectations.

This is not easy even for the experienced event planners among us. Where to start? How to manage booking information? What to do if the weather is not cooperating? These are all issues that can be hard to manage without an appropriate plan. This is where you will find our guide useful—it will help you create your plan for a successful event.

It is perhaps easier to conceptualize your plan as a series of four main phases (conception, planning, implementation, and evaluation) you must go through. This guide explores each phase of the event-planning process. A summary of what it entails is detailed along with specific responsibilities and skills you will need as the event planner.

Figure 2 - Project Management Phases

## Conception (Preparatory Work)

Figure 3 - Project Management Conception Phase

An event begins as an idea. The first step to organizing an event is developing the idea into a full concept. This involves clarifying your vision. What is the goal of your event? Why is the event necessary/useful? What will your event offer that the audience does not already possess? Your event concept must answer these questions.

### Step 1: Set your Objectives

* Determine your objectives (what is the problem that will be solved?).

### Step 2: Determine your target audience

* Who is your target audience?
* Who would benefit the most from this event?
* Could you expand your target audience to other people who may find it useful?

### Step 3: Conduct preparatory work

* Identify your stakeholders (speakers, technicians, volunteers, participants, and all those involved in the organization of the event).
* Determine the delivery method of your event (in-person, online or hybrid).
* Prepare an initial timeline for the organization of your event and include a to-do list.

### In Summary

The responsibilities of an event planner at this stage:

* Develop a well-rounded concept for the event including objectives and a target audience.

Essential Skills of an event planner at this stage:

* Articulating a vision
* Creativity

## Planning (Before the Event)

Figure 4 - Project Management Planning Phase

After your concept is ready, it is time to move on to the second phase. The planning phase involves steps destined to concretize the event. Note that these are not in order and you may work on more than one-step at one time.

### Step 1: Schedule your Event

* Try to choose a midweek day (Tuesday, Wednesday, and Thursday).
* Choose a date far enough in the future to give you enough time to make the necessary preparations.
* Avoid days around holidays and “short weeks” because many people take additional days off around these holidays and fewer participants will be available.
* Be mindful of aligned events and do not compete with other events.

### Step 2: Choose a location

|  |  |
| --- | --- |
| **Venues for in-person events** | **Platforms for online events** |
| * Consider transit and parking availability when choosing the location
* Consider the price of food (if eating) and beverages
* Consider if there is space to mingle or just tables to sit
* Consider accessibility for those with mobility issues
* Ensure there is no minimum-spending price to book the venue
 | * Consider security and privacy norms of the GoC
* Consider the price of the platforms/services
* Consider the utility of interactive tools offered by those platforms/services
* Consider accessibility for those with vision or hearing impairments
 |

### Step 3: Set up Registration

Consider how many attendees you expect. In general, the bigger your event, the more formal the registration process should be.

* Use a platform that is easy to manage like Microsoft Forms or Eventbrite.
* Create invitations with the following information.
	+ Date
	+ Time and duration
	+ Venue and street address
	+ Target audience
	+ What to bring (CV, business card, etc.)
	+ Agenda of the event
	+ Contact person for questions
* Comply with the [Official Languages Act](https://laws-lois.justice.gc.ca/eng/acts/O-3.01/index.html) (Your invitations and all other communications should be bilingual in both English and French).

### Step 4: Prepare your Communications

* Make a list of all the information you need to share with different stakeholders.
* Establish when you need to share what information with which group. This may include an initial invitation, a call for volunteers, a reminder to registered participants or an invitation to share feedback after the event.
* Develop a communication schedule using Tab 5 of the Event Management Template.
* Send a reminder registered participants 24 to 48 hours before the event. (Include the date, time, location and what they must bring/do in your message).
* If the event is sold out, tell the confirmed guests that others are on a waiting list and you would appreciate a notice of cancellation if they are not attending.
* If the event is not sold out, ask the guests to let you know if they will not attend so you can adjust the reservation as needed.
* If there are any changes you need to inform attendees about, let them know as soon as possible and make sure promotional material reflects those changes.

### Step 5: Develop your Marketing Strategy

For your event to be a success, you will need a marketing strategy that effectively reaches your target audience and successfully leverages their participation. Plan early! Lead-time is necessary to build interest and attraction to your event.

* Establish a list of every channel you will use to promote your event (these may vary depending on the type of event you organize and can include emails, social media posts, posters, etc.).
* Write a promotional message. This is a short text of one to two paragraphs that describes your event. Make sure to include the following information:
	+ Date
	+ Time and duration
	+ Venue and street address
	+ Target audience
	+ What to bring (CV, business card, etc.) (if needed)
	+ Contact person for questions
	+ Registration link or process
* Create sample promotional material including email invitation templates, social media posts, draft posters and others.
* Plan a release schedule of your promotional material using tab 3 of the Event Management Template.

### Step 6: Manage Possible Risks

* Make a list of all vulnerabilities that could threaten the success of your event (bad weather, internet outage, absent speaker, etc.).
* Prepare contingency plans to address the vulnerabilities highlighted.
* Communicate the contingency plans to your team.

### Step 7: Procure Supplies and Services Needed

Chances are that you will need materials or services for your event you do not already possess. It is essential you identify your needs early to allocate enough time for the procurement process to run its course.

* Once you have determined your needs, work with your manager or a stakeholder to identify if there are funds available.
* After determining that a budget exists for the materials and/or services, you should contact a procurement specialist or someone who has authority to make purchases in your team to initiate the request.
* Preparing a business plan that includes a business justification. This is useful to assist the purchasing agent in procurement the right supplies.
* Use tab 7 of the Event Management Template to stay on top of your budget and procurement needs.

*The spending of public funds is well regulated and the exact procurement process in each department can vary, consult your manager and the procurement division of your department for more information on how to procure goods and services for your event.*

### Step 8: Manage your Team

* Identify your volunteering needs and assisting needs necessary for you to plan and deliver your event early.
* For an online or hybrid event, plan to use a technician to manage the digital tools.
* Solicit your volunteers and organize a training session before the event.

### In Summary

The responsibilities of an event planner at this stage:

* Choosing a date
* Choosing a venue
* Setting up registration
* Develop contingency plans
* Prepare budget and initiate procurement process
* Develop marketing tools and communication products

Essential Skills of an event planner at this stage:

* Multitasking
* Coordination of information
* Attention to detail

## Implementation (During the Event)

Figure 5 - Project Management Implementation Phase

On the day of the event, your role as the event planner is to execute the scenario that you have been planning and coordinate the various activities of your event.

### Step 1: Handle a Sold Out Event

* Be prepared to close registration early if your event reaches capacity (especially relevant for in-person events where physical limits exist on capacity).
* Plan a wait list option and open it once normal registration is full.
* Adjust the registration form to reflect the fact that the event is sold out. Include an invitation to check out other events and an invitation to follow you on social media (if applicable).
* Ensure a greeter verifies if attendees are registered when entering the venue of an in-person event.

### Step 2: Manage your Team

* Make your team arrive early to the event to arrange any outstanding last-minute details.
* Meet with your team before the event starts to assign specific roles and do a rundown of the event schedule.
	+ Have one team member welcome and guide special guests such as speakers.
	+ Have one team member working as the greeter for attendees verifying registration and guiding them to their place.
* Ensure the venue or the online platform is optimized for accessibility. This may mean moving some furniture to make sure the room is wheelchair accessible or close captions are enabled for participants on online meeting platforms.
* Always remain accessible so that if a guest or an attendee encounters a problem, you can help resolve the issue quickly.
* Avoid resolving conflict in between your team members in front of other people.
* Always remain professional.

### Step 3: Manage Participant

* Some participants tend to be early birds and arrive well in advance of the start time of the event. Consider this when planning the arrival time of your team.
* Before the event begins, make sure all activities are ready to be deployed for the event.
* Ensure all required material has been distributed in advance (it is usually recommended not to distribute anything during a presentation, as it tends to disturb the audience).
* Always greet participants as they come in and thank them for the attendance once they leave.

*Despite a thorough plan and best intentions, something beyond your control may still cause problems. Remember to prioritize the participant experience.*

### In Summary

The responsibilities of an event planner at this stage:

* Set up location
* Welcome and assist guests and speakers
* Manage volunteers and team members
* Greet participants
* Coordinate the various parts of the event
* Solve any occurring problems to the best of your ability with professionalism.

Essential Skills of an event planner at this stage:

* Problem-solving
* Adaptability
* Communication
* Coordination
* Professionalism
* Excellent customer service

## Evaluation (After the Event)

Figure 6 - Project Management Evaluation Phase

Now that your event has ended, there is only one last phase in the event-planning process. Evaluating your event is something that many forget or do not take seriously but is quite important to understand whether it was successful. Indeed, success is not only characterized by whether things went according to plan. It is necessary to know whether the event’s intended goals were achieved and if participants liked it.

### Step 1: Connect With Your Attendees After the Event

* Send a post-event message to your participants. This message serves three purposes:
	+ It thanks them for their attendance.
	+ It invites them to share their thoughts about the event.
	+ It invites your audience to stay connected by suggesting ways to remain engaged (often via social media).
* Create a short survey and include it in your post-event message. This survey should be short and include the following questions and prompts:
	+ Did the event meet your expectations?
	+ Did you like the delivery method and location?
	+ Useful data for research (department they belong to, tenure, etc.)
	+ Ask suggestions for other venues/platforms
	+ Ask suggestions for future events
	+ Invite them to subscribe to your mailing list
	+ Invite them to give their name to volunteer to the next event
* Repeat this exercise internally with your volunteers, the organizing staff and your guests and speakers.

### Step 2: Reconcile Outstanding Accounts

* Run an inventory of all purchased supplies and identify what has not been used.
* Liaise with your purchasing officer to find the most appropriate way to handle the surplus (it might just be to keep it on and for future use by someone else).
* Work with your purchasing officer or manager to ensure any outstanding payment for services rendered/goods purchased has been made.

### Step 3: Conduct the Post-Event Assessment

* Prepare a post-mortem assessment once all feedback has been gathered.
* Share your retrospection with your team members and other event planners in the GoC that could benefit from your experience.

### In Summary

The responsibilities of an event planner at this stage:

* Seek feedback from participants
* Reconcile any outstanding financial transactions
* Create reports and post-mortems if needed

Essential Skills of an event planner at this stage:

* Willingness to learn
* Creativity
* Open to feedback

# Looking Ahead

The concepts presented in this guide serve as an introduction to the world of event planning in the context of the public service. It is part of the GC Students Event Planning Toolbox and can be used along other tools. This starting point hopefully gives you the confidence to begin organizing your events.

Our toolbox is designed to continue to grow along you. As you gain more experience planning both in-person and virtual events, you will find additional tools in the toolbox that may be beneficial. What if you cannot find what you are looking for? GC Students would love to hear about it and help you find it.

As you plan events, you may develop some tools of your own. We invite you to share them with other public servants and GC Students. Do not underestimate how other public servants may learn from your experience. Collaboration is the fastest way and most effective way to improve event planning across the Government of Canada. Sharing your tools will help make a difference in your organization and beyond.

When planning your next event, remember that GC Students is available to help you at isc.ncr.rcn.cei@gmail.com. You can also want to check out other resources, some of them listed below:

* [Toolbox Wiki Page](https://wiki.gccollab.ca/GCStudents_-_%C3%89tudiantsGC/Toolbox_-_Outils)
* [GC Students Wiki Page](https://wiki.gccollab.ca/GCStudents_-_%C3%89tudiantsGC)
* [Federal Youth Network Wiki Page](https://wiki.gccollab.ca/Federal_Youth_Network)
* [Accessibility Standards Canada Resources](https://accessible.canada.ca/resources)