

## Event Planning Procedure

### 1. Develop Event Goal and Objectives

The first step is to establish a tangible goal, objectives and audience. (*why are you organising this event, what do you hope to achieve and who is it for?*)

At this point it would be beneficial to review CCS's policies to make sure that the event complies. Particular policies of interest might be: Environmental, Travel and Equalities. If the event is lacking in any of these areas concerted efforts should be made to address this.

### 2. Establish a Budget

Before deciding on the specifics, confirm how much money there is available for this event, which may alter the size, location and length of an event.

Having a provisional date in mind at this point will assist with gathering attendees and quotes at a later date.

### 3. Fill in Event Planning Form

This form should ensure that at this early stage you've properly addressed all the key aspects of event planning. Once the form has been completed you should circulate it within the organisation in order to a) brief them on the event and b) gather their opinions/ideas/comments on the event. This will also aid with the next step.

### 4. Organise a Team and Define Roles

If the event needs more time than you have available make sure to ask for assistance at as early a stage as possible. This might involve creating a work plan for the event. If it is an event run by CCS alone enquire with colleagues about their availabilities and clearly define roles. Additional staff competencies and training needs should be taken into account when discussing team roles.

Scheduling event semi-regular team meetings for appropriate times before the event should keep everyone updated on the progress of the event and the tasks to be completed.

### 5. Establish Supplier Needs

Outside suppliers that you may need to contact are:

- venues;
- speakers;

- catering;
- travel;
- printing;
- accommodation;
- partner organisations;
- technical requirements;
- facilitators;

Ensure that the principles of P06 (the Procurement Policy) are considered when contacting these external suppliers. The Suppliers Handbook should be provided to all new suppliers to establish and raise awareness of CCS' sustainable procurement aims.

Health and Safety and Accessibility considerations should be paramount throughout decisions around outside suppliers, in addition to economic cost.

## **6. Risk Assessment and Safety Concerns**

Read through and complete F27 (Risk Assessment Form) in order to address potential safety concerns, in addition to any risk assessment and health and safety considerations of the venue.

## **6. Brand Your Event**

This means that you need to come up with a dynamic overall theme and you need to take great care with the actual name – since it can be a key attention-getter, especially online. Return to your key Goals and Objectives from step one to make sure that your brand is on point.

Things to consider are: Name, Tagline and Logos.

## **7. Determine Administrative Processes**

In other words, how are you going to keep track of your planning, registration, budget, guest and speakers lists, etc.?

CCS has an Eventbrite account to keep up with registration and a document on Sharepoint could be the best option to keep information readily available for all.

## **8. Feedback**

Decide what type of feedback that might be useful for you to gather for this event. For example, do you want to assess what your audience found most useful about the event, what they would like to see more of in similar future events, whether there

were elements which could have been improved? You might also want to consider the objectives of your particular project and whether you could assess whether these are being achieved.

Once you've determined what feedback you want to gather think about how you will gather this. Options include:

- Survey Monkey (there are existing Green Tease and Workshops Survey Monkey Feedback forms for use).
- Eventbrite
- Paper forms (These can also take the form of a pdf printout of the Survey Monkey form)
- Social media engagement

## 8. Create a Communication Plan

Event promotion tends to start with the initial notice or page on your website, note in your newsletter or email to save the date, and then builds to include online and offline publicity, media relations and on-going outreach to encourage registration.

Continual contact with your communications and social media team will be a big help when publicising an event.

## 9. Determine Evaluation Process

How will you determine if your event is a success? Do you measure success by the number of registrants or attendees? When you set your initial event goals and objectives, you should also consider how you will evaluate the event to determine your success. By the same token, if the objective of your event is to raise awareness, you'll have to benchmark and gather data on online social media activity/mentions etc. and offline publicity – again based on your initial goals.

For some events you might want to provide evaluation forms or email survey monkey links after the event. You will also want to provide a form in order to record attendees' travel to and from the event.

# Event Planning Procedure Checklist

Event goals and objective identified.	
Budget established and confirmed by line manager.	
Event planning form completed.	
Staffing needs and roles identified.	
Supplier needs identified and contacts made.	
Suppliers Handbook provided to chosen suppliers.	
Risk assessment completed and safety concerns considered.	
Event brand decided and planned.	

Administrative processes, including document storage and guest registration, established.	
Feedback procedure created and planned.	
Communication plan created and planned.	
Evaluation process established.	