



*Branch Guide to
Event Planning*



APEGGA

The Association of
Professional Engineers, Geologists
and Geophysicists of Alberta

APEGGA Guide To Event Planning

Table of Content

The Early Stage

Why have an event? p.3

Event purpose p.3

What type of event should you have? p.3

Who is the event for? p.3

Mapping the basics p.4

Getting started p.4

Plan outline p.4

The Event Plan

What you should know p.5

Description of the event p.6

Pairing-up p.6

Location considerations p.6

Determine vendors p.6

Special licenses or permits p.6

Keep in Mind p.6

Promotion/ advertising p.7

Budget p.7

Evaluation p.7

Planning Table p.7

Following the Event: Now What

Follow-up p.8

After the Event p.8

Add ons

Event Ideas p.9

Planning Guide p.10

The Timetable p.11

Budget Guide p.11

APEGGA has designed this booklet to help your branch with the basics of organizing fun and rewarding events in your community. The booklet is simply a guide, outlining some of the keys to a successful program. It is important to note that you are not alone in your planning; APEGGA public relations staff is available to help.

APEGGA can help by

- supplying the names/contact numbers of local schools.
- providing local media with press releases for your event.
- advertising your events on the APEGGA Web site.
- supplying the names/contact numbers for local radio, television and print media.
- generating ideas for activities.

APEGGA can provide you with a variety of items to assist your branch in hosting an event; please contact the Outreach Program in either the Edmonton or Calgary office should you wish to acquire any of these items.

- APEGGA displays*
- bookmarks
- career publications
- table-top displays

*These items will be booked on a first come, first served basis. Due to demand and various other activities/events that APEGGA participates in throughout the year, APEGGA advises that you book these materials well in advance.

This booklet is not intended to restrict your branch to the ideas contained within. Feel free to use your creativity and ingenuity and seek out support for your efforts from local schools, colleges and businesses with which you can form successful partnerships.

As you read through this guide, remember that not all of these suggestions will apply to every event. Develop a checklist of your own. Be flexible. Have fun.

The Early Stage

Before you begin planning the event stop to ask if the event is really needed. What overall goal is trying to be achieved by holding the event, and is an event the best way to reach that goal? Once you've decided that an event is needed, assign a planning team.

Why have an event?

Some of the reasons to hold an event

- awareness, profit or fundraising
- social/cultural, political, religious or economic
- informational, promotional, charitable or persuasive
- very formal or informal

You may be able to tie the event to things happen in and around the community:

- trade shows
- seasons
- events in the news
- weeks: National Engineering Week or Science and Technology Week...

Event Purpose

Make sure that the event is important enough to merit the time and expense needed to properly stage, publicize and evaluate the event.

- why will there be an event?
- what do you anticipate as the outcome?
- what do you want attendees to gain from the event?
- is this going to be a one-time event or a repeat event?
- if it is a repeat event, how will you improve it from the prior one?

What Type of Event Should You Have?

Different types of events can achieve different goals.

- receptions
- ceremony
 - awards
- party
 - office
 - company Anniversary
 - holiday
 - retirement
- luncheon
- tradeshow
- seminar
- fund-raiser
- informational
- hospitality
- promotional

Who is the event for?

Once you've determined why you are having the event, determine who the event is for.

Is the audience internal or external?

Internal: staff, members, volunteers, partners, donors, or management, shareholders, contractors...

External: schools, teachers, other associations, media, general public, special interest groups...



A well-planned event results in an enjoyable and memorable experience for everyone - including you!

Mapping out “the basics”

We’ve already looked at why you are having the event and who the event is for, now we need to map out some basics:

Who is planning the event?

- is it a committee?
- how many people?
- roles and responsibilities

When would you like to have the event?

- what is the ideal date and time?

Where would you like to have the event?

- where are your guests coming from?
- how many people do you anticipate?
- will you be needing extra room?

Once you’ve got the basics, move into the specifics. Every good event begins with a plan. This is a written plan (it will change and expand over time) and is made up of many parts. This document will cover details of the planning process and designate responsibility for different tasks. Taking the time to make a plan at the outset will help your group stay organized and focused. It’s a good idea to work in small teams with specific tasks and deadlines.

The plan should

- prioritize the activities
- determine the critical dates that must be met
- assign responsibilities
- arrange follow-up meetings to review activity status
- anticipate roadblocks and identify alternatives
- communicate: deadlines, delays, assignments, encouragement...
- determine if the event is to break-even, etc...

Don’t forget to document all of your work (work plan, planning meeting agendas, etc.) and save it in a folder so that future planners can reference it!

Getting Started

Once you know the basics, where do you go?

- select a chair and members for your planning committee
- research past events
- develop an event plan
- set event dates
- pick a theme
- select chairs for sub-committees (setup, cleanup, volunteers)
- formulate a publicity plan
- prepare print material.
- distribute list of responsibilities and schedule for each committee member
- host the event
- evaluate

Plan Outline

Project

Background

Event Goal

Event Objective

Event Audience

Event specifics

Budget

Contingency plan

Evaluation

The Event Plan: What you should know

Project

What is the event and why are you having it?
What is the date, time and location of the event?

Background

Is this an annual event or a one-time event?
Have you done similar events in the past?

- how many people attended?
- what did you learn from the event?

Event Goal

Very broadly, what is it that you want to achieve? What are you working towards?

Event Objective:

What exactly are you hoping to achieve?

- concrete measurable objectives that this specific project will accomplish by its end.

Event Audience:

Be as specific as possible.

- who are you inviting?
- how many people?
- what do you know about them?
- what do they know about you?
- where are they traveling from?

Event Specifics:

What goes into planning the finer details of the event?

- description of event
- promotion/Advertising
- activities/Tasks
- medium
- roles/Responsibilities
- resources/ Supplies (materials list)
- target Date status

(outlined more in-depth in the following pages)

Budget:

What is the financial outlook?

- how much can you spend?
- how much are you willing to spend?
- will the event produce revenue? or will it just break even?

(outlined more in-depth in the following pages)

Contingency plan:

Realize from the start that not everything will go as planned. In many cases you will be the only one to notice that they didn't. Life in all aspects is unpredictable. Plan on it! Be flexible and have a plan "B". "Plan B" doesn't need to be as involved as the primary plan; it's only a fall back.

Evaluation:

Make sure you follow-up.

- how did it go?
- do you need an evaluation form for attendees?

(outlined more in-depth in the following pages)



Now it's time for the fun stuff, a break down of the nitty gritty that goes into event planning. Let's summarize what we should know by now: Why you're having an event; what the purpose of the event is; what type of event you are having; who the event is for; who is involved in the planning; where and when you'd like to have the event; what you want to achieve with the event; and who will attend the event.

Description of Event

What will the event look like from start to finish as the day unfolds? What will the room look like? What things will happen when? You should have a clear vision of the final day before you even begin. It is important to know what you are working towards and then walk backwards from there. What do you need to get to the point? Know all of your **event specific details!**

Pairing-up

When you approach a potential sponsor or partner be sure to point out the benefits of contributing. Look for groups with similar goals or similar target audiences.

- volunteers
- partnerships (schools, companies...)
- sponsorship

Location

Considerations:

Things to keep in mind will picking a location.

- room capacity
- lighting
- parking
- electrical Supply
- phone hook-ups
- computer/internet access
- disabled access
- elevators for equipment hauling
- security liability

Determine Vendors

Will you have to contract out?

- caterers
- entertainers
- florists
- photographers
- printers
- registration assistants
- audio-visual suppliers

Special Licenses or Permits

What do you need to hold the event?

- alcohol
- permission for using copyrighted material
- traffic control or road blocks

Keep In Mind

- First planning committee date
- Select date and location
- Pick a theme
- When to make the first announcement of the event
- Prepare and print promotional materials
- Select caterer/ menu
- Select entertainment
- Select decorations
- Order/ purchase any prizes or materials needed
- Contact volunteers to ensure their participation
- Designate a photographer for the event
- Determine audio-visual needs
- Select overnight accommodations, if needed
- Secure transportation, if necessary
- Select and confirm speakers
- Finalize your agenda
- Confirm attendees
- Re-confirm details
- Hold a pre-event review session or call everyone involved to ensure everyone understands the sequence of events and the roles that they play.
- Prepare event materials
- Prepare necessary signage
- Prepare materials to be shipped to event location
- Set-up on site
- Familiarize volunteers with event activities
- Enjoy the event
- Don't leave right after the event; stay to answer questions and catch-up
- Following the event, arrange for clean-up

Promotion/ Advertising

This takes creative thinking balanced with practicality. Your primary objective is to publicize the event, but your secondary objectives might be

- trying to inform, educate or entertain
- increase awareness or attendance of the event
- build a base support from a specific audience
- facilitate good community relations
- provide a forum for networking

All promotional material should include the event date, activities, times, locations and contact information. You need to determine who you want at the event and how you can best reach them. It may be an invitation only event, or it might include an elaborate media relations or advertising plan.

Ways you can publicize your event:

Create a simple flyer outlining the details of the event. Post the flyer in prominent social areas - staff rooms of members' workplaces, schools, theatres, malls, libraries, etc.

Local media may be willing to run public service announcements about your event.

Send out press releases 7-10 days prior to the event informing them about the activity, and inviting them to attend.

Consider getting local media celebrities to participate in the event.

Follow-up.

Budget

No matter how small or large an event is, it will cost money. Are there individuals, businesses or organizations who might be willing to donate money, goodies or manpower?

Keep track of all money coming in (sponsorship, ticket sales, donations) and going out (printing, permits, speakers).

Keep receipts.

Evaluation

Take time to evaluate right after the event while the details are fresh. Determine ways to evaluate the event's success: volunteer and participant surveys or visuals (body language).

Look for specific ways to measure the event:

- number in attendance
- money made
- did you meet the goals and objectives of the event? why/why not?
- attendance comments

Planning Table

Activities/ Tasks	Medium	Role/ Responsibility	Resources/ Supplies	Target Date	Status
What specifically do you need to do?	By what means are you going to complete the task? <ul style="list-style-type: none"> • in-house or contract 	Who is going to complete the task? <ul style="list-style-type: none"> • name, phone number • department 	What do you need to complete the task?	When do you want to have the project completed? (usually a good idea to leave at least a week, in case things go wrong or come-up)	<ul style="list-style-type: none"> • Pending • In-progress • Complete

Following the Event: Now What?

You've hosted the event and it's been a huge success! Everyone involved thoroughly enjoyed themselves and all are anxiously looking forward to next year.

Follow Up

Once completed and evaluated it is time to look at

- what worked and what didn't work?
- did you miss any items on your checklist?
- what was it?
- was it worth doing?
- would you do it again?

After the event

Send thank you letters to all partners, sponsors, schools and volunteers that helped.

Tally the number of volunteers, participants and spectators that turned out to enjoy the event.

Monitor local area media to see if the event received any media coverage. Clip all articles and start a scrapbook.

Return any materials borrowed from the APEGGA offices promptly.

Develop all event photos. Label each photo with the event, year, location...

Prepare a package for APEGGA and forward it to either the Edmonton or Calgary office. Include copies of the media clippings, photos, and a summary of the event attendance. This information is for tracking purposes and is used to prepare a summary report for the CCPE. We also post highlights on the Web site and publish a wrap-up article in *The PEGG*.

Should someone wish to pen a highlight article after your event and include it with the event package, please feel free to do so.

The following pages include

- Event Ideas: a list of sample activities for kids that are suited for National Engineering Week or Science and Technology Week
- planning guide
- a budget guide

Remember to have fun and contact the APEGGA Communications Department if you need help.

Venues/Logistics:

Barb Robinson
Shirley Layne
In Edmonton
(780) 426-3990
1-800-661-7020

Public Relations/Advertising/Media:

In Edmonton
Sherrell Steele (Manager)
Bronwen Strembiski
(780) 426-3990
1-800-661-7020

In Calgary
Carmen Killick
(403) 262-7714

The important thing with any event is to have fun. Remember that if things should go wrong, odds are you will be the only one to notice.

Event Ideas

Engineer for a Day Contests

Arrange for students to participate in a contest that would see a number of lucky winners given the opportunity to experience first-hand what it would be like to work as an engineer or geoscientist for a day.

University/College Open House

Working with a local post-secondary institution, arrange to have an open house. Invite the public to tour lab facilities, witness hands-on demonstrations and hear lectures and presentations on ground-breaking work being undertaken at the school and the engineering and geoscience programs.

Mall Competitions

Partner with a local mall to host a student competition right in the mall. Invite children of all ages to stop by a designated competition area to have some science fun. Have children engage in an activity according to predetermined age categories and test their creations upon completion. Record the results and notify winners from each category at the end of the day. In addition, set-up displays and have volunteers on hand to discuss the professions with mall patrons.

Science Nights

Offer to host a science night at one or more of the local schools. Interactive displays, hands-on activities and a speaker are great ways to introduce students and parents to the professions. Invite local area engineering and geoscience firms to participate as well.

Poster or Essay Contests

Have local schools compete in a poster or essay contest. Propose an engineering or geoscience challenge and have students illustrate their solutions in the form of a poster or essay. Topics and prizes can be awarded according to age category.

Evening Lecture

Sponsor a special evening lecture with a prominent guest speaker. Invite teachers, students, the public and other professionals to learn more about the engineering and geoscience professions. Should your branch decide to host more than one activity during NEW, the evening lecture could provide a suitable forum within which to recognize the week's activities and present prizes.

Tours

Organize public or group tours of major engineering and geoscience accomplishments in the area. Use the tour as an opportunity to educate the public about the various processes and techniques involved in the design and construction of each. The tour could be guided, giving the public the opportunity to ask questions. You may also want to give the public the opportunity to participate in the tour on a self-guided basis, in this case, you will need to create maps and explanatory materials. Remember to consider if any safety hazards that may prohibit taking tours alone.

Libraries

Take the wonders of engineering and geoscience to the public. Arrange with a local library to sponsor an "Engineering & Geoscience Day." Demonstrations, exhibits and hands-on activities for all age groups can be organized. Professional members should be on-hand to address questions and provide information. As part of a commitment to foster children's interest in math and science, arrange to donate materials to the library as part of the festivities.

Work Place Challenges

Spark office spirit by having professional members compete against each other in a predetermined building activity to see who can come out on top.

Planning Guide

Considerations

- ❑ Establish Budget
- ❑ Establish Planning Committee
- ❑ Determine Program/Itinerary
- ❑ Develop Timelines
- ❑ Organize Volunteers
- ❑ Transportation
- ❑ Entertainment
- ❑ Insurance/Liability
- ❑ Contingency Plan

Book Venue

Room Layout:

- ❑ Theatre
- ❑ Classroom
- ❑ Square
- ❑ U-Shape
- ❑ Dinner - head table, formal vs.informal seating
- ❑ Other

Audio Visual Requirements:

- ❑ Microphone
- ❑ Podium
- ❑ Overhead
- ❑ Computer Projector
- ❑ TV/VCR
- ❑ Laser Pointer
- ❑ Screen
- ❑ Other

Food/Beverage Order:

- ❑ Breakfast/Lunch/Dinner
- ❑ Coffee Breaks/Snacks
- ❑ Reception
- ❑ Cash Bar vs. Host Bar
- ❑ Dietary Restrictions/Special Meals

Accommodation:

- ❑ Block of rooms vs. individual bookings
- ❑ Smoking vs. non-smoking
- ❑ Hospitality suite

Invitations/ Publicity

Sending Out the Invitations:

- ❑ What form? Letter, poster, invitation, other?(Who, what, where, when, why, cost)
- ❑ Guest list
- ❑ VIPs
- ❑ Media
- ❑ RSVPs - To whom? By when?

Promoting the Event:

- ❑ One-to-One
- ❑ Poster/Flyer
- ❑ Cross-promotional opportunities (with other groups, at other events)
- ❑ Direct Mail
- ❑ Guest Speaker
- ❑ Media - advertisements, public service announcements, features, news releases, media notices
- ❑ Internet/E-Mail
- ❑ Newsletters - article, insert, calendar
- ❑ Specialty Advertising Items (promotional giveaways)

The Timetable

Weeks Before the Event

- Develop program/agenda
- Confirm speakers and roles
- Finalize attendance
- Confirm logistics and meeting requirements with suppliers
- Finalize meal numbers/special dietary requests
- Speaker/VIP gifts acquired
- Book photographer

The Big Day:

- Registration Table
- Signage/Decoration
- Information Packages/ Handouts/Name Tags
- A/V in place
- Room layout suitable
- Lighting/sound levels appropriate
- Table set up/sufficient seating
 - media table
- Speaker/VIP gifts
- Meal numbers adequate/ special meals available
- Photographer in place
- Players know their roles

After the Event:

- Post-Mortem
- Thank You Letters / Complimentary Photos
- Monitor newspaper for clippings (send copies to APEGGA's PR Group)

Budget Guide

EVENT NAME: _____
 BUDGETED AMOUNT: \$ _____
 COORDINATOR(S): _____
 VENUE: _____ DATE: _____

INCOME

Ticket Sales
 Number of tickets sold _____ x \$ _____ = \$ _____

Bar Sales (If Applicable) \$ _____

Cash Advance \$ _____
 Sponsorship \$ _____
 Other (Specify) \$ _____

Total Income \$ _____

EXPENDITURES

Speaker Costs
 Hotel \$ _____
 Meals \$ _____
 Fares / Travel \$ _____
 Other (Specify) \$ _____
 Gift for Speaker \$ _____

Food Costs \$ _____
 Room Costs \$ _____

Liquor License \$ _____
 (Note: If you take out a liquor license you must also take out liability insurance)

Liability Insurance \$ _____
 Wine / Beer Costs \$ _____
 Shipping Costs \$ _____
 Promotion \$ _____
 Printing \$ _____
 Mailing \$ _____

Total Costs \$ _____
Event Profit / Loss \$ _____ (Income - Costs)