



RELATE

Conference

EVENTS BREAKOUT

THE EVENT PLANNING PROCESS: LEARNING HOW TO TAKE AN EVENT FROM INITIAL BRAINSTORMING SYSTEMS, TIMELINES AND BUDGETING STRATEGIES

HI! WE ARE...

Carly Keubler

Events Director at Bayside Community Church

Carly.Kuebler@mybayside.church

Eugenie Strawderman

Events Director at Bayside College

Eugenie.Strawderman@baysidecollege.org

RELATE
Conference

SYSTEMS FOR PLANNING

- Event Master Document (Control Doc)
 - Aka: Event Bible / One Source of Truth
 - Central document that holds all event information
 - Eliminates the need to search emails or multiple files
 - One-stop shop for everything related to the event
 - Must be consistent + constantly updated
 - Framework of your event
- Example Control Document
- How to build a control doc
 - What are the main buckets/ pieces of information for the event?
 - For Example: Speaker, theme, purpose, budget, team leads/ staff or volunteer roles, schedule, vendors, etc.
 - You can't rely on your brain or memory - it must be written down

TASK MANAGEMENT SYSTEM

- You need a Control Doc
 - For recurring events:
 - Copy last year's doc and remove year-specific info
 - Use as your framework
- You need an Event timeline
 - Create monthly planning checkpoints
 - Know what happens early vs. close to event
 - Plan wisely around your capacity
 - Example of Event timeline
- You need a Master to-do list
 - Split it into different categories
 - Urgent, Not Urgent, & Random
 - Example of to-do list
- You need a running "feedback" list
 - Note improvements for next year while planning

TO DO LIST EXAMPLE

The image shows a screenshot of a digital to-do list application. At the top, there is a toolbar with icons for editing, text formatting (Aa), list creation (bulleted and numbered), calendar, and a search bar. The main content is titled "Christmas Banquet TO DO List" and is organized into three categories: "VERY URGENT", "NOT URGET", and "RANDOM/OTHER". Each item in the list is preceded by an unchecked radio button.

Christmas Banquet TO DO List

VERY URGENT

- Email Valentino's final headcount
- Pay Valentino's
- Order paper for backdrop
- Order all Winter Wishes
- Finalize pinned students
- Email staff about pinned students
- URGENT
- Email Doerr about setting up on Thursday
- Order LED lights for dance floor
- Email Dorraine about setting up Thursday
- Bring tablecloths to the dry cleaner
- Email staff assignments
- Order all table décor
- Order photobooth material
- Order backdrop paper
- Order appetizer plates and napkins
- Talk to Caleb about the dance party
- Talk to Trent about reviewing songs for dance

NOT URGET

- Make Aldi shopping list for appetizer
- Make drinks and dessert shopping list
- Staff assignments
- Setup assignments
- Wrap all Winter Wishes
- Get chargers and tablecloths from pod
- Meeting with Jen about faculty involvement
- Look up mocktail recipes
- Count how many candlesticks and candles we have
- Count how many chargers we have
- Count how many garlands we have

RANDOM/OTHER

- Talk to Scurry about production
- Make sure there is fishing line and scissors in rescue box
- Update budget
- Meeting with Abby and Trent to finalize the game
- Figure out prizes for game winner
- Organize rescue box
- Get pins from Aimee's office

COMMUNICATION PLAN

- Who needs to be communicated to?
 - Staff, volunteers & vendors
- When to communicate
 - Give plenty of notice
 - Avoid last-minute asks
 - Create timeline touchpoints
 - Follow up consistently
- Update the control doc as you solidify all the information
 - Keep your “event bible” an actual source of truth.

TIMELINE

- *Event size: 150-200 people
 - 12 Weeks: Define mission & vision of event
 - 10 Weeks: Host brainstorming session
 - 8 Weeks: Finalize budget, theme and event details. Promote event & start gathering volunteers.
 - 6 Weeks: Order food & pay vendor deposits
 - 4 Weeks: Order supplies and finalize event itinerary
 - 2 Weeks: Last minute event push to attendees and volunteers
 - 1 Week: Last minute details
 - Day before: Set up event
 - Day of: Execute event
 - Week after: Recap meetings & put everything away

TIMELINE

- *Event size: 500+ people
 - 6 Months: Meet with leadership for vision, budget and expectations
 - 5 Months: Set brainstorming meetings & give vision to teams
 - 2-4 Months: Planning & ordering
 - 1 Month: Programming meeting with key players
 - 3 Weeks: Communicate plan to all people/ volunteers involved
 - 2 Weeks: Finalize details/ logistics
 - 1 Week: Last minute details; plan for the unplanned
 - Day before: Setup
 - Day of: Execute
 - Week after: Recap meetings & notes

BUDGET

- Start by building a clear framework for your budget
 - Allocate portions of the budget to each key leader
- Think through every element that makes the event happen and create a projected budget so you know early where adjustments may be needed.
- Prioritize needs over wants
 - Needs: food, signage, and guest experience
 - Wants: décor or enhancements
- Allocate budget to all key players
- Events Budget Example: Christmas Banquet Budget

Q & A

Carly Keubler

Events Director at Bayside Community Church

Carly.Keubler@mybayside.church

Eugenie Strawderman

Events Director at Bayside College

Eugenie.Strawderman@baysidecollege.org

RELATE
Conference