



Event Planning Basics

Event Purpose

Special events allow people a glimpse into the heart and soul of the university and learn what makes Sam Houston State University stand above the rest. Events can help build commitment and strengthen community support and understanding of SHSU's goals and mission.

Special events may provide opportunities to educate, recognize, and commemorate those who have helped the University. Knowing why people want to become involved with your program will help you determine the kinds of events to plan for various constituencies. Events may include luncheons, receptions, dedications, anniversaries and other celebrations.

All events begin with the same strategy and planning process. Some events take longer to plan because they are more complex, as determined by their purpose and audience.

Event Goals

Before establishing goals for a special event, a committee should be formed and composed of key persons who are capable of ensuring the success of an event. An effective committee should include people who are active, involved, and well-informed about the University and its objectives. For example, if parking is needed for an event, a representative from the University's Police Department should be included from the beginning. If committee members do not have time to participate fully, an alternate representative should participate in their place, or at least a member should be consulted about the goals and elements in their area.

When determining goals, also ask—what is the purpose?

1. To gain media coverage?
2. To raise money?
3. To say "thank you" for an individual's/group's effort?
4. To raise awareness of University programs?
5. To celebrate an anniversary?

Picture yourself taking part in the event from the moment you receive the invitation. Imagine how you will respond, how you will travel to the event, where you will park, the route you will walk, what you will see upon entering, who will greet you, what you will do next, what you will eat, what you will wear, what to drink, how the program will be introduced, what the lighting will be like, how the event will be concluded, and how you will depart.

The Six Dimensions of Event Planning

To create perfection every time, consider the following six critical dimensions, or layers, of the event experience: anticipation, arrival, atmosphere, appetite, activity, and amenities.

1) Anticipation

Creating anticipation for an event encompasses marketing and communication issues. The materials used to announce or invite should be designed in such a way that they are enticing and build excitement while establishing the appropriate expectations. The event communications must be particularly persuasive to convince event goers to spend their time and, perhaps, money at your event.

2) Arrival

An event must be designed to ensure that the arrival dynamics are safe, efficient, and an integral part of the overall event experience. This includes understanding and accommodating attendees' travel and transportation requirements, providing the proper directions and instructional information, and conveying an obvious and warm welcome. From the decorated entryways to cheerful greeters and registration staff, the first impression will set the tone for the time they are attending your event.

3) Atmosphere

The event site or venue should be selected and developed with a keen eye for location, layout, and audience accessibility and comfort. You must review the venue's atmosphere, assets, and liabilities so appropriate décor and the necessary infrastructure may be selected. Keep in mind sanitation services, sufficient utilities and shelter for your guests.

4) Appetite

Fulfilling the guests' appetite includes the selection of meals that match the occasion, palate and your budget. The menus should be appealing and nutritious, and must address any physical, religious, or philosophical dietary preferences or restrictions. For example, do not plan on serving crab cakes as an only option at an event. It is possible a good portion of people may not care for them or are allergic to shellfish.

5) Activity

Whether spectator or participatory, impromptu or produced, there is always some activity at an event. The purpose and goals of your event will shape the decisions about entertainment choices, meaningful diversions, and recreational options you offer at the event. These should be selected and scheduled to create a progressive experience with a strong opening, intriguing activities paced to provide amusement and enrichment, and an exciting, memorable finale.

6) Amenities

An event is ephemeral. Once it is over, all that is left are the memories. Amenities are the details incorporated into an event to provide the tangible expressions that extend the legacy of those memories and offer walk-away value. These are the fine points and keepsakes that show you care about the guest's comfort and the guest's experience—before, during, and after the event.

Each layer or dimension offers endless possibilities for crafting the perfect event experience, and each brings an array of applications and implications that must be integrated into a seamless production plan.

A simple reminder of what any and every special event includes may be summed up like this:

*Something to do, something to see,
something to eat and drink, somewhere to pee.*

Theme

One important aspect of event planning is choosing a theme for your event or gathering. It's wise to have a theme that all guests can easily adapt to. Having to go out and purchase a new outfit or rent an elaborate costume is a burden for some people, and attending an event should be something that people look forward to. A theme needs to be purposeful and meaningful and should showcase the university. A theme gives direction and focus and relays a message to the audience. The event theme should be in-line with the events goals.

Dress Code

Black Tie: means formal. Men wear tuxedos, women wear cocktail, long dresses, or dressy evening separates.

White Tie: means ultra-formal. Men wear full dress, with white tie, vest, shirt and cummerbund.

Formal: Usually means the same as the Black Tie, but in some trendier cities like New York or Los Angeles, it could mean a black shirt, no tie with a tux. Women wear cocktail, long dresses or dressy evening separates.

Ultra-Formal: means White Tie. Men wear full dress, with white tie, vest, shirt, and cummerbund. Women wear long gowns.

Black Tie Optional: means you have the option of wearing a tuxedo, but it should clue you into the informality of the event, meaning a dark suit and tie would be your other option. Women wear cocktail, long dresses, or dressy evening separates.

Creative Black Tie: leaves room for trendy interpretations of formal wear. He can go more modern with a tux—maybe dark shirt, not a tie. She wears long or short dress, or evening separates (maybe a long lace or sequined skirt with a sleek cashmere sweater).

Semi-Formal: is the trickiest of all dress codes. Usually it means that tuxes are not required, nor are long dresses. An evening event (after 6pm) would still dictate dark suits for him and a cocktail dress for her. Daytime semi-formal means a suit for him and an appropriate short dress or dressy suit for her.

Cocktail Attire: means short, elegant dress for her and dark suits for him.

Dressy Casual: means no jeans or shorts; similar to Business Casual, but a tad dressier

Business Casual:

Women: capris/long shorts are acceptable as casual dress and regular dress if they are "tailored" and of a dress pant material (usually not denim or heavy cotton) or a tennis shirt and trousers

Men: a combination of collared shirt (such as a dress shirt), cotton trousers (such as khakis), or tennis shirt with a belt, and shoes (such as loafers) with socks is generally acceptable.

Casual: generally anything goes; sometimes referred to "Berkat Casual" if it is an athletic related event. Friday is considered Spirit Day and "Berkat" (Sam Houston colors) are recommended.

Informal: can mean the same as Casual, however, when associated with a special event, some form of decorum and good taste should prevail. A dress for her and a nice pair of slacks and shirt for him are informal, but respectful for the event.

Audience

When planning an event, keep in mind the type of audience that you have or would like to attract. You should be clear on who is invited to your event and to include that information on any promotional materials. You should also be careful to consider what services may be necessary to enable everyone to participate. If the public is invited, ensure that your space is handicapped accessible.

- How many people should be invited?
- What individuals or groups should be on the guest list?
- Is it important for the president to be there?
- Should you arrange for reserved parking or request suspension of ticketing?
- Special circumstances or needs because of the ages of the audience?

Anticipated Attendance

Invitations and news releases should require participants to RSVP. As a general rule, an RSVP deadline should be set at least one week prior to the event to allow for last minute adjustments. Requiring reservations for an event is the best way to determine the size of your audience. It is important to be realistic about your anticipated attendance. More people may increase revenues, but they also often increase costs. An event with 25 people sitting in a room that holds 300 can lead to the feeling that your event is not successful or can disappoint invited speakers; it may be better to run the risk that a few people won't get into the event.

A good rule of thumb for deciding how many invitations to send out to reach your attendance goal is the one in ten rule. According to a national study, for every ten invitations you send, you'll likely get one reply. So for every 100 invitations you send, expect at least ten guests.

Guest Flow

Good traffic control—or lack of it—can make or break a special event. There is a definite science about traffic control and it is all about essentially manipulating your guests to go where you want them to go. When the guests arrive, act like they are checking into a resort and let them know

where everything is—don't just say "hello." If you provide them with the information upfront, it is going to increase the chances of your guests to go where you would like.

Tips:

- Food and drink always draw guests. Put an open bar or serve appetizers near exhibitors or the main attraction.
- Remind your guests throughout the night of the places you want them to go. "Don't forget to stop by and see the art pieces created by the students of Sam Houston!" This can be done formally, by having a speaker announce it, or informally by simply walking around to the tables. The biggest factor is to start engaging your guests in the beginning and keep engaging them throughout the event.

Budget

Prior to outlining the event budget, ask if a similar event has been held previously. If a comparable event has already taken place, there will be an incremental budget which can be expanded upon and/or have necessary changes made that pertains to the new event. This means less time spent on making a budget, and more time spent on creating a successful event.

If the event will be constructed from zero-based budgeting (a first-time event), begin by creating a written estimate of all anticipated costs before you get too far into the planning process. Be sure to include all fixed (constant), variable (per-person basis), indirect (administrative) and miscellaneous or unpredictable expenses. Include costs for room and equipment rentals, printed materials, postage costs, food and beverage expenses, signs and decorations, flowers, honorarium for speakers, fees for entertainers and musicians, video or slide show costs, security, photography, transportation and travel costs for speakers, cost of translators, and other expenses that may occur. Analyze each of these possible budget items, and list expenses that may occur for each. Compare revenues versus expenses. Share this information with those responsible for signing off on expenses, as well as those who will purchase the items. Nothing spoils the enthusiasm of a successful event more than learning too late that adjustments in your total budget allocation must be made. Always keep in mind that the budget is just an outline. Attempt to stay within your budget, but remember that situations may arise which require the expansion of the budget.

Estimated Budget Guide: (includes invitation, food, linen, décor)

Breakfast:

- Seated breakfast = \$15 per person
- Buffet breakfast = \$12 per person
- Continental breakfast = \$8 per person

Lunch:

- Seated luncheon = \$40 per person
- Buffet luncheon = \$35 per person

Dinner:

- Cocktails & Seated Dinner with Wine = \$100 per person
- Seated Dinner = \$45 per person
- Buffet Dinner with Beer & Wine Bar = \$50 per person
- Buffet Dinner = \$40 per person

Admission Charge

Deciding whether or not to charge admission depends on your event. Charging a fee is one way to secure partial underwriting. If your goal is to provide community service, consider free admission.

Date Considerations

When choosing a date for a special event, the following should be considered:

1. Religious holidays
2. Cultural perspectives
3. Athletic schedules
4. Other campus events
5. Other local events
6. Weather (<http://www.almanac.com/weather/>)
7. VIP availability

Availability of space and services will often impact your ability to plan the successful event you would like.

Then, try consulting Sam Houston State University's web calendar which will include all events that have been scheduled at the University. <http://www.shsu.edu/events/index.html> It is also recommended to check with the Director of University Events, Charlene McWilliams, for any major conflicts.

Then check the Huntsville Community Calendars:

- Huntsville Walker County Chamber of Commerce <http://www.chamber.huntsville.tx.us>
- The Huntsville Item <http://itemonline.com>
- KSAM <http://ksam1017.com/category/event>

Remember:

- Consider students' class schedules when including a student audience.
- Scheduling events over campus breaks are generally more costly, since students are not readily available to assist with event tasks. This generally requires higher-priced staff labor to fulfill event requests.
- It is generally more difficult to find open dates later in the semester. Fall semester is generally more heavily loaded with events than is spring semester.

Time Considerations

- Building Hours: Please keep in mind that not all buildings are always open. While it may be possible to arrange to have a building opened, there may be additional costs or security concerns.
- Set-up and clean-up: Be sure to reserve the time required by catering, media services and others to set-up and clean-up before and after your event.
- Consider how to dovetail your event with others already scheduled to create event synergy with similar audiences.
- Ensure that your event does not directly conflict with a class time that would engage the same audience as your event.

- Ensure that your event does not directly conflict with another event targeting the same audience, so all events have the best opportunity for success.
- Consider the implications the time of your event has on the event type. For example, for events that begin during the dinner hour, the audience would likely expect some type of food to be served.

Timeline and Checklists

Event planning often requires coordination with one or more campus departments. Sometimes this coordination is obvious to the event planner and sometimes it is not. There are so many things to consider that it is often difficult for one event planner to know all aspects of the campus that might be affected by their event.

For a large event, a timeline will help everyone involved stay on schedule prior to the event. Sharing the timeline with others will help related departments know the work load of the program director and staff. Include in this timeline all activities to be completed by a certain date including: mailing of invitations; ordering of items needed; selection of menu; printing of brochures and programs; and so on. Construct another timeline for the day of the event including: arrival of guests; time points for moving guests from one location to another; times for programs to begin and conclude; as well as any elements in between. The event agenda should always be shared with administrators participating in the occasion.

The checklist is a necessary part of managing special events. It can save time as well as helping ensure all details have been arranged for a successful event. A checklist should include such items as room setups, audio/visual needs, menu selection, parking arrangements, invitations, programs, entertainment, and telephone numbers for members of the committee, and the budget information. To avoid misunderstanding, share the information that you have documented with all others involved in the preparation of the event.

Follow Up

Immediately following the completion of the event, be sure you reward those people involved with its execution (especially the members of the committee). Expressing your sincere gratitude, orally, and in writing, will make others feel good about being a member of your team.

Submit all invoices to the staff member responsible for paying the bills. If bills are coming directly to you, verify the charges immediately and pay promptly. Check the arrangements ordered from vendors to be sure they state the final number guaranteed and that any other changes to the original order are noted. Keep copies of all receipts and invoices for your records and prepare a financial statement for the record and for future reference.

Make it a point to solicit formal and informal evaluations from your guests, your committee members, and others. In order to evaluate objectively, ask the guests to suggest ways to improve your program. Analyze the weak points of the event to determine what improvements can be made for next time. Document steps necessary to prevent a repeat of problem areas at future events. Through systematic evaluation, you will be able to strive for perfection, plan events which meet your goals, and showcase the excellence of the University in ways that will respond beyond the event itself.

Event Name: _____ Event Date: _____

Event Management Check List

1. PRE-PLANNING

- Objectives
- Audience(s)
- Messages
- Costs
- Dates
- Location

2. INVITATIONS

- Phoned
- Electronic
- Letter
- Printed, informal
- Printed, formal
- RSVP return card
- RSVP by telephone
- Reminder mailing

3. PROGRAM

- Topics
- Speakers
- Speaker contact
- Speaker agreements, honoraria
- Equipment needed
- Biographies
- Introductions
- Hospitality
- Transportation
- Housing
- Mementos

4. FACILITIES

- Number of people
- Auditorium-type seating
- Conference room seating
- Table shapes: O, U, V
- Food service needed
- Parking
- Directional signs
- Marquee sign(s)

5. EQUIPMENT

- Lectern
- Public address system
- Microphone(s): Lapel, Neck, podium, table, floor
- Raised platform
- Projection screen
- Projector
- Remote control cord
- Video projector
- Flip charts, markers
- Extension cords
- DVD player and monitor
- Compact Disc player
- mp3 player / iPod
- Other: _____

6. PUBLICITY, PROMOTION

- Mailing lists
- Promotional mailings
- Posters, flyers
- Advertising
- Social Media
- Media contact
- Media fact sheets
- News releases
- Talk show appearances
- Press packets
- Press room
- Special phone lines for media

7. PHOTOGRAPHY

- Type: b&w, color
- Hire photographer
- Shot list for photographer
- Video
- Hire videographer

8. FOOD, BEVERAGES

- Menu selection
- Caterers
- Schedule
- Type service (buffet, seated)
- Tables for 6, 8, 10
- Head table
- Place cards
- Seating diagrams
- Beverages
- Hospitality room service



9. PRINTED PROGRAM

- Agenda
- Speakers' biographies & photos
- Organizational information
- Lists of officers, committees
- Lists of contributors
- Design, printing
- Quantity
- Distribution

10. REGISTRATION

- Registration form
- Bank account
- Reporting system
- Registration confirmation
- On-site registration
- Tables
- Computers
- Equipment
- Personnel
- Cash receipts
- Programs
- Name badges
- Pre-registration list
- Ticket sales
- Host identification
- Signs

11. TRANSPORTATION

- For equipment
- Lease or charter vehicles
- To and from parking areas
- For speakers & special guests
- Between locations
- Signs on vehicles
- Publish or post schedules

12. ESCORTS AND GUIDES

- For speakers
- For special guests
- For tours, exhibits, etc.
- Aboard buses as needed

13. DÉCOR

- Select theme
- Entrances and exits
- Speaker platform
- Head tables
- Dining tables
- Hospitality suite

14. TICKETS

- Prices
- Advance sales
- Printing
- Distribution
- Sales reports
- Ticket and money control
- Complimentary tickets
- Press tickets
- Sales at doors
- Collection at events

15. ADDITIONAL CONSIDERATIONS

- Bad weather planning
- Exhibits, displays
- Entertainment
- Security
- Technicians for equipment
- Ambulance on stand-by
- Police, traffic control, security
- Valet parking