EVENT Plan of Work

## WHAT

Name of event:

Location:

Date:

Purpose:

## WHO

Committee:

 Go Fast Team (worker bees)

 Stakeholders/Advisory (Content area experts)

 Collaboration (Partners/sponsors)

 Sponsors (Financial support)

Who makes decisions about budget?

Who makes decisions about approving statement of work?

Account number for expenses

## WHY

What strategic initiatives are connected to the outcomes of this event?

Target Audiences impacted by this event

## HOW

How will this event be evaluated? What measurements will be done? Are you benchmarking against an existing data point?

## CHECK THE LAY OF THE LAND

What other College or University events are taking place at the same time as this one?

What other College events are similar in scope to this one?

Has this event been tried before? Are there post event (post mortems) that we can learn from?

ASSUMPTIONS, RISKS, and OPPORTUNITIES

What assumptions are we taking for granted that are critical to the success of this event? What factors might pop up that could reduce the impact/success of the event?

What factors might enhance the impact/success of the event?

**Contact the College Event Planner** (Penny Shanks, Shankspe@msu.edu) with your event information. She will assist in doing a cross check to make sure you are aware of all the resources that might assist with the planning and hosting of your event. This includes sharing your information with Marketing & Communication (MARCOM) and the Advancement office.

## COMMUNICATION PLAN

*Reference the target audiences you’ve identified when completing the Communication Plan.*

When, where and how often will you meet?

How will you communicate between meetings?

Where will committee documents be stored? (Teams, Google Drive, Drop Box, D2L, Other)

Does everyone have access to the documents they need?

## BUDGET (estimated income and expenses for the event)

As part of the budget planning, divide the total expense budget by the planned number of attendees. This gives you a budget impact number. Is this a good value for the expenditure? What can be done to increase the impact without increasing budget?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **INCOME** | Rate | # of | Budget | Actual |
| Funds from College, Endowment, Department or Center Budget |  |  |  |  |
| Registration Fees/Admission |  |  |  |  |
| Sponsorships |  |  |  |  |
| SUBTOTAL INCOME |  |  |  |  |
| **EXPENSES** |  |  |  |  |
| Graphic Design Services |  |  |  |  |
| Photographer Services |  |  |  |  |
| Videographer Services |  |  |  |  |
| Swag |  |  |  |  |
| Venue Rental Fee |  |  |  |  |
| Rental Table & chairs |  |  |  |  |
| Linens |  |  |  |  |
| Audio Visual needs |  |  |  |  |
| Food and Beverages |  |  |  |  |
| Event Decorations |  |  |  |  |
| Printing |  |  |  |  |
| Signage |  |  |  |  |
| Event Activity Supplies |  |  |  |  |
| Speaker Fees/Honorarium |  |  |  |  |
| Travel & Lodging for speaker(s) |  |  |  |  |
|  |  |  |  |  |
| SUBTOTAL EXPENSES |  |  |  |  |
| Income – Expenses= |  |  |  |  |
| Expenses/ by # of participants |  |  |  |  |

# TASK LIST

Also part of the budget, include the work effort required for pre planning and for hosting the event. Work effort is calculated based on the **task list.**

## PRE-EVENT TASKS (includes logistics and marketing)

For each task, estimate the minimum time (using work units) required for completion.

A work unit of effort is = one person working up to 4 hours on one day. *(see attachment on how to calculate work units)*

### 6 Weeks or more in advance of the Event Date

**Room reserved**--# of tables, chairs, requested set up. Tablecloths? Projector, screen, microphone. Remember to include a welcome table and hospitality table. Reserve your room for 1 hour ahead and 1 hour after the presentation needs time. This is for set up and clean up. Know the rules for garbage disposal and returning serving dishes.

**If you are inviting the Dean** to speak or make comments at your event, you need to contact Deanna Thomas to get on his calendar and Penny Shanks to coordinate the collection of information about your event so MARCOM can prepare the Dean’s remarks.

**Guest speakers who need travel, lodging, and/or honorarium.** Meet with your fiscal officer and communicate with them on your event. They may be able to assist you in knowing the correct account numbers for direct billing and to do the travel booking for you. Honorariums require a W-9 or W-8BEN to be filled out prior to the event in order to ensure the speaker is paid.

**Identify Catering and contract services**—be sure to check that special dietary need options are available; beverages; plates, silverware and serving utensils. Some MSU venues have a preferred list of caterers. Be sure you understand the rules.

*Check out the excel spread sheet of Restaurants and Caterers in the East Lansing/Lansing area. It includes contact information, websites, details on delivery costs and event room space. Find this file in CAL TEAMS Events Channel*

When using Kellogg Catering and larger venues, guaranteed numbers may need to be called in as early as 4 weeks prior to your event date. Final numbers (you can go up from your guaranteed number but cannot go down) will likely be 1 week prior to your event.

**Building access arranged**—if the event is after hours or on the weekend, you will need to do an IPF and police department request to have access to the rooms. (Be sure to inquire about having the AC on if it’s a weekend summer event. Normally the buildings power down to save energy on the weekends.)

**Photographer contracted.** Departmental and Center events need to contract their own photographer. College events may be able to have a photographer from MARCOM attend their event and take professional photos.

**Videographer contracted.** Departmental and Center events need to contract their own photographer. College events may be able to have a photographer from MARCOM attend their event and take professional photos.

**Event posted on the College Event calendar**—contact Penny Shanks (shankspe@msu.edu) for information if you do not have someone in your department that is trained on calendar postings.

**Create and start using your marketing materials and social media.**

It is the responsibility of local departments and centers to create their own marketing materials (flyers, emails, social media). Templates can be found on cal.msu.edu. For questions on this contact Penny. College level events may be eligible for assistance from MARCOM

**What should be on a flyer:**  Who, What, When, Where, Why and How. Have someone proof the flyer that is unfamiliar with your event. Make sure they know how to register, where it is, what time, on what day and why they should attend. Always include a contact (email or website) for more information.

**If you need assistance with Graphic Design.** It is the responsibility of local departments and centers to contract a graphic designer. College level events may be eligible for assistance from MARCOM. If you have questions about finding a graphic designer, contact Penny.

**Order Swag** The Event Coordinator can suggest vendors to work with for custom imprinted items. Avoid backorders of swag you are intending to use, shipping delays, and express charges by planning to order no less than 6 weeks prior to the event.

### 4 WEEKS Prior to event

**Call in guaranteed attendance numbers** for Kellogg Center Catering. Remember that this is the lowest number you plan to have at your event. You cannot adjust this number down after this date.

**Recruit volunteers** to assist with set up and hosting of the event. (Remember to include your volunteers in your head count for catering.)

### 2 WEEKS prior to event

**Identify event Set up Team.** Create a plan for set up. Who will be assisting? Is there a map of how you want things to be set up? Who will help bring materials for set up to the venue? How will you move items—do you need a cart? Where will you get the cart? Have a supply tool kit: scissors, sharpies, tape, post it notes, etc. Preview the technology on site and the needs of your speaker/presentations. Make sure you know how to operate the technology. Triple check computer connectors and dongles. Mac Books are notorious for needing specialized dongle connections.

**Do a walk through of the event space** to confirm accessibility and visually check your set up map. This includes checking for electrical access and working projection screens.

**Coat rack and Bathrooms—**make sure you know where the restrooms are in the venue so you can communicate that to your guests

**Plan for a registration sign in sheet or online pre-event registration.** This will be required if requesting reimbursement for a Business Meeting expense.

**Prepare and print the agenda and signage for your event.** Will people be able to find your room? (remember that whatever signage you put up, you need to take down at the end of the event.)

1 WEEK prior to event

**Print name badges and table cards.** Mail Merge and Avery templates are the fastest way to do this, however, you need to be sure your data base is correct. That includes capitalizations and spelling. Have a few extra name badges for walk ins or errors in name badges.

**Parking**—communicate parking options for your speaker and audience. Consider getting a parking code for nearby lots which is direct billed to your event. If you’re at Kellogg, order complimentary parking passes to give your guests. (There’s a charge for this and they can’t be returned if unused so low ball the number. You can always get a few more on site the day of the event.)

**Have a plan** for who greets the guest speaker when they arrive, escorts them around campus and makes sure they know breakfast, lunch and dinner plans.

Consider having a **gift basket** with snacks, water bottles and an MSU branded item delivered to the hotel and waiting for them upon check in. If they aren’t staying overnight, have a gift bag with similar items to give them as a thank you for speaking.

## DAY OF EVENT TASKS (includes logistics for set up and hosting of event)

* Transport set up items to the event venue and set up.
* Test electronics to be sure everything is working.
* Have someone ready at the registration/check in area to greet early arrivals. (There are always early birds.)
* Have 2 bottles of water for each speaker(s)
* Make sure someone is assigned to liaison with your speaker. Their job should be to make introductions, assist with any special last-minute requests and to keep the speaker relaxed and engaged.
* Set the tables, distribute materials, set up registration/check in
* Encourage registration/check in table volunteers to stand at the table rather than sit. People will engage more easily if you are standing.
* As the event starts, pay attention to lighting, if a presentation can’t be seen, find a way to dim the lights.
* Be sure the speaker and the audience know where restrooms are.
* If parking is being validated, be sure to communicate that to the speaker and the audience.
* After the presentations, make sure your speaker(s) don’t get uncomfortably trapped by someone who wants to engage in long conversations. Keep the Q and A moving. Discretely interrupt and help the speaker move to a new person or be permitted to pack up and leave. Many speakers are okay with answering questions and willingly give their time—so pay attention to body language and intervene if you need to.
* Clean up the room and reset it to how it looked when you arrived.
* Dispose of extra food.
* Transport supplies back to the department or center. Make sure that everything you came with is going “home” with you.
* Thank the venue staff.

## POST EVENT PLAN FOR FOLLOW UP (what actions will be taken to maximize the impact that began at this event?)

Double check that the Fiscal Officer has all the receipts, invoices, copy of attendance roster and flyer or agenda from the event.

Confirm that the honorarium may be paid to the speaker now that the event is over.

## POST EVENT REPORT/POSTMORTEM (lessons learned)

Collect data, post event survey information, feedback from volunteers, stakeholders, GoFAST planning team and report out the measurements taken related to this event including budget wrap up.