

Compiled and interpreted by Kathy Wright, CPCE
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If you were writing a blog entry about event planning for the other planners on your campus, what would you write about? Why would you choose this subject?

Many suggestions for blog topics seemed to fall under the heading of "Event Planning 101". Among campus event planners there seems to be strong interest and need for a centralized database of information, resources and planning tools. A web-based campus resource could easily be shared and include any of these items:

Where to go for your campus resources
Basic facts and contacts, checklists, weblinks and templates for event planner
Function room resources
Event production schedule
Vendor clearinghouse: quality, pricing
Templates: press releases, invitations
Working within an event budget
Safety and security information
Scheduling of authorities
Consolidated calendar for physician/researcher/speaker travel

Other blog suggestions were more advanced topics around strategy and design:

Branding basics: cohesive, concise
What is expected: timeline based on university culture
Creative and inspirational photographs
Who approves guest lists
Communications
Protocol, etiquette
Talking to planners and attendees about expectations
What are the goals of an event: who, what, where, when, why
Different players of an event: who are the different types of audiences for one event
How to set expectations with partners: how to synthesize agendas and make sure all are at the same starting point.

Bringing your event to the next level: how to customize; involve vendors, designers, other experts.

Finally, many event-related topics lend themselves quite well to the narrative style of a blog:

War stories
Messaging: making an emotional impact: tell the story, and make sure attendees walk away with the message
Patient &/or benefactor stories from events: show impact with testimonials
How departments can work together to make events successful
Consequences of lack of communication
Getting volunteers involved

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Complete this sentence: If I had an entire work week free of events and planning deadlines, I would take the time to do this:

More than a few responded with sad-but-true plans for utilizing this precious time:
Vacation
Sleep

It's no surprise that so many event planners put this off...
FILING!!

However, it is also indicative that despite available technology, event planning remains a very paper-based process. Can this be minimized?

Other popular responses suggest how critical it is for event planners to be organized, systematic, and strategic:

Clean out desk, event storage and supplies
Analyze ROI of past events
Event debriefing
Update events record with final details, notes
Update databases, forms, reformat spreadsheets
Benchmarking: event professional salaries, job descriptions
Work ahead on future events: brainstorming, advance problem solving
Write a policy manual

Creativity and community are important:

Team building activities; staff appreciation
Building relationships with support departments
Get involved in community
Attend local events
Build portfolio of past event successes: apply for awards

Skill and resource development seems to be an area that we typically don't have enough time for either:

Implement project management software
Setting up infrastructure for social media tools
Professional development: learn more about protocol, research new ideas, trends (internet/magazine/blog research)
Staff and student training
Skill development: photoshop
Wine/ beer/ food tastings
Visit new business, vendors and venues
Update website
Digitize and archive records

Regardless of what the task is, each planner felt that the tasks identified would make them more effective at their jobs. Therefore, we can't wait for that fictitious free week to happen! We have to identify and prioritize these plans, and somehow carve out a little bit of time for them in the midst of the real day-to-day demands on our time.

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What form or tool have you created or adapted that has allowed you to “work smarter” in your event planning?

To many event planners, working smarter means working more efficiently:

Calendar notes for next year’s events
Machforms.com: for designing custom forms
Detailed checklists, speakers bureau document
Presidential calendar request form
Equipment request form
Catering worksheet with ordering formulas
Uniform formatting for documents
Color coded files
Registration research on attendees and guests to estimate attendance for future events
All-encompassing logistics document
Equipment inventory
Event bag/box with supplies
Event board in office with deadlines, tasks
Campus committee of event planners

Technology based tools were the most popular responses. In some cases, technology improves efficiency, in others, it gives us the data to plan events more strategically.

Raisers’ edge/ Advance electronic tracking
Map Point: alumni locator
Personalized checklists; event production schedules
Using Outlook task scheduling
Database, spreadsheets w/costs & ROI for future events
Microsoft Access: event management tool for archived files, guests lists
Dashboard project management tool
Using social media to work with students and younger donors
Wordpress newsletter system
RSVP and cash payment systems
Online registration system
Electronic archiving
Room design software: RoomViewer, MeetingMatrix
Paperless invitations
Webpage with planning tools

Some of these valuable tools are the very things other planners previously identified on their free-time wish list. Between those that have the tools and those that want the tools, event planners have a good understanding of what it will take for them to be able to “work smarter.” The most successful planners make it happen!

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What staffing strategies do you employ which enable you to “work smarter” as an event planner? This could refer either to administrative staff or on-site event staff.

Building and empowering our team with some of these ideas:

Use briefing packets to manage event and development staff

Keep volunteers happy/ make friends

Vertical staffing hierarchy for specific events: single decision maker, identify 2nd in command, 3rd.

Delegate according to strengths

Delegate smaller duties, recognize internal growth opportunities

Hire people who are experts in things you are not

Foster good internal and external relationships

Service Solutions for event setup

In house AV services

A unique resource that we have on campuses is student and volunteer labor: an advantage, but also sometimes a challenge:

Student volunteers/ambassadors/interns assist with registration, directions, coatcheck

Internal co-op program

High school students

Alumni council: trained to volunteer for events

Advisory committees, logistics committees: separate

Development staff must attend and help with events

Give comp time for overtime earned by development admins who work events

Other campus volunteers

Campus wide events council: partner with other departments

Post event critiques often concentrate on the execution of the event. Do you ever critique your planning process for your own events? What lessons have you learned?

*As planners, we **do not** always include a critique of the planning process. To improve, some planners suggest:*

Collect feedback, make notes on process along the way

Keep a running list of things to do/not to do that all planners on team can edit

For large events where one planner can't possibly see everything: important to get input from others during the critique process

Important to use photos in the critique process

Critique roles and responsibilities: did we have the right people performing the right tasks?

Ask: did the planning process begin soon enough?

Remember to critique the routine and one-time events, not just the signature or annual events

We evaluate so that we can learn and improve. Sometimes we analyze but fail to implement the changes: how do we make sure this happens?

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Think of an annual event which you plan, and compare last year to this year. Do you think you were working harder or working smarter (both, neither?) on this event this year? Why?

*Sometimes we learn specific strategies and time management techniques:
Consolidate decision making power to a small group
Go into meetings with decision makers with a proposed agenda, giving them something to react to (vs. leaving it open for their imaginations to run wild)
Fine tuning planning process and tools*

*Generally speaking:
First we work harder, then we work smarter: this suggests a trial and error learning approach. Better training and shared resources would shorten that learning curve.*

Regardless of our experience level, we are all working harder on budget driven concerns: contracting, purchasing, vendor selection

Sometimes we find ourselves working harder on annual events because of other drastic context changes beyond our control: new schools, new presidents, construction, economy/ budgets, higher enrollment

Other times, the key expectations regarding events will change after landmark historical events at university: new president, 50th anniversary. The old way of doing things is no longer the norm.

Event planning should get easier each year with repeat events, but each subsequent year we face the challenge of keeping an annual event fresh.