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Basic Principles of Events Planning and Management

ExL events can take a number of forms. Among them: conferences, orientation events, graduation events, alumni events, recruitment events, shorter format seminars or workshops, and the like. For each such event the following basic principles apply.

- First define the event and the intended audience – what are we trying to do and for whom are we doing it.
- For each event there should be a programming lead who is a senior ExL professional with program planning experience, who is responsible for the event as a whole, and who is responsible for defining and structuring the content of the event. Note: All events have content and structure, even an orientation program or a graduation event.
- The lead defines the event and creates a rough structure based on a clear statement of what the event is intended to do, who it is for, what the content will be, the expected size and scope of the event, and the like.
- The events planning team is convened as soon as the event is defined by the lead but before any plan, commitments, or invitations are sent out. The events planning team is made up of the programming lead, the lead from ExL's events management unit, and any other staff members who will be playing a role in the event. This group meets early (a minimum of six months before the event and earlier if it is an event such as a conference, seminar, or workshop that will need to be marketed well in advance with all the event details in place).
- This planning team takes the rough event plan and fleshes it out completely. This includes determining a site, a date, a time, a specific set of activities start to finish (how will the event flow), speakers and speaker formats (short remarks, key note of X minutes, panel of X members for Y minutes, etc.) with great specificity, and determining details about any refreshments or meals, any entertainment or services (music, photography, etc), and the like. The event should be outlined in as much detail as possible so everyone involved knows the plan from the start.
- Based on the detailed plan, the programming lead works with the planning team to determine what other information is needed to build a budget for the event (checking on food costs for the event as envisioned, cost of services like music or photography or the like, site costs, etc.). This information is gathered and then a budget is built by the programming lead working with the events management lead and the ExL financial team. If the budget is not viable (too high of cost for the nature of the event and the dollars in the ExL and/or program budget for the event or too high of cost for the expected revenue if it is an event for which a fee is to be charged), then changes are made by the planning team in the event plan to ensure it is financially viable.

- The financial unit contact for each event will be involved throughout the planning to ensure that decisions made about site, vendors, etc are in keeping with CSU and CSUN fiscal policies and that we are prepared as a college to successfully execute the planned event.
- Many types and levels of events are possible in ExL but the program lead with the planning team for each event must make an appropriate decision early about the kind of event it should be based on the purpose, content, and audience for the event. For example, it is possible to plan an elegant lunch or dinner for a graduation. However, that may mean that while the graduate can attend at no charge, there might need to be a charge for each additional participant the graduate wishes to bring. Even with a charge for guests of the graduate, there may be a limit on how many guests each graduate can invite because of site limitations (excluding hotels for sit-down lunches or dinners over a moderate size). Or, one might feel that it is more important to accommodate more guests and to have a smaller charge or no charge for additional guests. That would require planning an event that might involve a less formal approach and lighter refreshments. But, even with that approach, there would likely be a need to limit guests to ensure all who do attend are comfortable in the venue and enjoy appropriate hospitality.
- Once the plan and the budget are in place, the planning team develops a task and timeline for the event that specifies who is doing what and when. This should include a schedule of group meetings of the planning team so that all can be updated on progress so that the timeline and upcoming tasks can be reviewed. This should extend to and beyond the event to include who is sending out thank you notes to presenters/officials/speakers, who is wrapping up things with service providers, who is paying bills, etc. There will likely need to be a number of meetings close together to develop the plan, budget, and timeline. Meetings might then be less frequent until about two months before the event when there may need to be additional meetings to ensure that all is done, details are reviewed and the on-site plans are made for managing the event when it takes place. The programming lead remains responsible for the overall event and its success. The program lead should either serve as convener of all meetings or appoint a chair of the planning team who is accountable to the program lead and works closely with him/her.
- Once the plan and budget are in place every one should focus on executing the plan and there should be no changes made in the plan beyond those made absolutely necessary by things such as: a chosen site being found to be unavailable or like serious and unavoidable external factors. No rethinking at our end. No shifts in concept based on a later idea (save it for next year). No last minute changes of mind. This is a key issue for event success (and not driving one another crazy) – once the plan is in place, it is stone.
- The planning team (or a designated senior member of the team) should make an early visit to any site that is new and the flow of the event and the particular of each stage of the event should be mapped out with a clear understanding of the

physical space and the particular features of the site/venue for the event. For events that are more like conferences, there may be more extensive need to consider various sites, transportation and cost pluses and minuses, and the like, in selecting an appropriate venue.

- The events planning group in Marketing are responsible for booking space, working with vendors and service providers, and the like in keeping with the agreed upon event plan, selected site, and selected vendors chosen by the event lead during planning (all those things chosen to make budgeting possible). No one else should book space or work with vendors to avoid mix signals, double bookings, or failure to book, etc. Clear responsibility lines are important to successful events.
- When invitations go out to any speakers or “officials” who are to have a role in the event, they go out from the program lead and they provide complete details about the event and the role the individual is to play (what is expected of each invitee from start to finish). The invitation should be formal regardless of how closely the invitee is affiliated with ExL, CSUN, or the program/event in question. The invitation must be detailed so that the invitee knows exactly what is being asked of him/her in order to make an informed decision when considering the invitation.
- Invitations to general participants in the event and/or marketing materials (like an invitation to graduates for a graduation events or a marketing brochure for a conference) should be similarly detailed in explaining what the event is, why the person in question should attend, what will be expected of them, and any other particulars (costs, limits on the number of guests with and without charge, etc.). Invitations and/or marketing materials should include helpful aids such as maps to the venue, parking instructions, and the like. Any early “save the date” notice might be briefer but the formal invitation/announcement and/or marketing piece should provide all the information needed for easy and successful participation in the event.
- As the event approaches (two months out), the planning team should review/rehearse how the event will flow and which ExL staff members or assistants will play what roles on-site as the event takes place.
- All staff members or assistants with a role during the event should be convened by the planning team about one month before the event for a complete review as a group of the event in detail and the role of each person during the event. It is important that all on site have a good understanding of the whole as well as of their own specific role so there is a well-coordinated effort on-site as the event takes place.
- About one month out, those on the planning team assigned to work with presenters/speakers/officials for the event get back in touch with each to remind them about the event and their role. Detailed information about the event and their role should be provided. One week before the event, the responsible planning team member should be in touch again to see if all is well and check to

see if the presenter/speaker/official has any questions or needs – this is also time to reconfirm arrival time and the flow of the event. Speaker(s) and key guests should also be hosted well during the event (someone assigned to meet each, make sure they are guided into the right place for their role in the event, and to see to it that from start to finish their experience is pleasant and successful) as a reflection of ExL's standards and style and our respect for those we invite to be a part of any ExL program or special event.

- Participants should also be reminded about the particulars of the event about one month out and again about two weeks in advance (these reminders can be via note and/or email).
- All plans and all roles for an event should be clear, firm, and specific at least a month before the event. There may be need to make last minute changes in plan because of unforeseen circumstance, but in general, it is inappropriate to be changing plans once the overall game plan, budget and time and task plan are made very early in the process (not last minute running around trying to decide what to do next).

This overall approach to events planning spreads work out over time but consumes less time and effort and causes less confusion and headaches as the event approaches. Getting good at events planning and management is important for all mid- and senior-level staff in ExL given that we wish to be able to expand the program range as needed to include special events, conferences, executive seminars, etc. (some of which may be local and some of which may be national or international).