

Enfield College

Events Management Toolkit



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Leading learning and skills

This Toolkit is one of a series produced for Third Sector organisations by the pan-London European Social Fund project 'The Capacity Building Toolbox' co-financed by the London LSCs. The series covers six topics.

- Consultation and Representation
- Events Management
- HR Policies and Procedures
- Developing and Running a Training Course
- Sustainability
- Work-Life Balance

Each Toolkit takes a practical, hands-on approach to the topic providing the user not only with information and guidance but also with a series of interactive activities key to the topic covered. The user will learn by doing.

Led by Enfield College, the Capacity Building Toolbox Project also produced management standards and training materials specific to the Third Sector. Further details of these can be found on Enfield College's website under the 'for employers'/'Capacity Building Toolbox' link or by email to toolbox@enfield.ac.uk.

Training materials for the three-day training courses - which cover topics different to the Toolkits - are available for use by Third Sector organisations. The slideshows in PDF format are freely available for download from the College website (see link above). Contact toolbox@enfield.ac.uk regarding use of the full material, including trainers' guides and handouts, in its original form or consultancy support developed by the Project.

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OVERVIEW

Welcome to the Capacity Building Toolbox 'Events Management' Toolkit.

This practical tool has been developed to help voluntary and community organisations (VCOs) meet the growing demands on them to raise their profile, fundraise and promote themselves to stakeholders, members of their local community, the wider public, potential partners and funders.

So why an 'Events Management' Toolkit? Because many staff in the voluntary and community sector (the 'Third Sector') find themselves with a brief to organise an event for the first time, with very little experience and often with limited resources.

On other occasions, the event planner may be experienced but juggling a demanding post while planning an event with a short deadline and, again, a miniscule budget. Whatever the scenario, a common challenge is how to effectively plan an event. Another is how to secure skilled, committed and supportive staff to help get the event off the ground.

Against this backdrop, this 'Events Management' Toolkit will help you to plan with confidence and guide you towards a successful event. The Toolkit has been tailored to accommodate the new demands facing the Third Sector.

For effectiveness and value, we have covered the broad headings of events rather than feature every individual type of event ever devised. The common link between all successful events is advanced and effective planning, which is what this Toolkit aims to facilitate.

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HOW TO USE THE TOOLKIT

The Toolkit has been laid out sequentially from the moment the idea of an event is raised right through to assessing the value and outcome of your chosen event after it has taken place.

As well as using the Toolkit as a start to finish guide, you can dip in to it at any point of your event management and planning process. Checklists, case studies, tips from experts and charts along with helpful tasks, backed by useful resources - from web links to relevant research and books - aid this approach.

DEFINITION

Most dictionaries define an event simply as a 'thing that happens' or 'takes place'. The reality for VCOs is that 'an event' requires extensive planning, time, a budget and clearly specified objectives: all things for which the VCS is strapped.

Events are, in fact, 'a significant happening' or 'a social gathering or activity', which engages people for a specific purpose with clear objectives. They usually have a public image, attract people from outside the organisation, have an intrinsic promotional value for the organising agency, offer scope for campaigning and reinforce accountability.

TYPES OF EVENTS

There are many types of events that are planned and managed in the Third Sector. They largely fall under seven broad headings:

- AGMs
- Conferences
- Concerts
- Launches
- Fundraising
- Awareness Raising
- Exhibitions

Some events will fall under more than one of these headings, depending on the needs and objectives.

EVENT MANAGEMENT DOS AND DON'TS

A view from the experts

Anecdotal evidence culled from a variety of events over the past several years has thrown up a number of dos and don'ts, particularly the benefits to the target audience.

According to South African-based event and marketing specialist, Tony Roocroft, attention has to be paid to the needs of your target audience. This can make a significant difference to the quality of your event.

What event participants want

- ✓ Advance knowledge of the event schedule and social activities so they can plan and prepare.
- ✓ To be welcomed as individuals.
- ✓ A quick, efficient registration process that is handled by positive, helpful personnel.
- ✓ A diversified conference programme that includes the most current information, materials, techniques and theory as well as the opportunity to discuss current legislative and social developments.
- ✓ A flexible programme geared towards a variety of groups from service users, statutory representatives and academics.
- ✓ Practical, new and specific ideas.
- ✓ Opportunities to speak with other delegates/attendees and speakers; also the chance to ask questions, where possible.
- ✓ Roundtable sessions with an emphasis on group discussion.
- ✓ Networking opportunities.
- ✓ Ability to attend more than one workshop.

- ✓ Comfortable furniture located throughout the venue to facilitate conversation
- ✓ Access to ITC and the Internet.

WHAT EVENT PARTICIPANTS DON'T WANT

- ✗ To be trapped in crowded meeting rooms.
- ✗ Long registration lines.
- ✗ Poor meals or poor service.
- ✗ A lack of easy-to-access parking facilities.
- ✗ Speakers, who do not show up, run overtime or change topics too often.
- ✗ Programmes that don't allow enough time for breaks.
- ✗ To get lost while trying to locate concurrent session rooms.
- ✗ Inhospitable hosts.
- ✗ Insufficient ventilation and heating.
- ✗ Programmes that over-run.

Viveen Taylor, former chief executive of The Progress Trust and director of the National Body of Black Prisoner Support groups, offers some pointers:

'Have an events planning team to take on specific tasks with the ability to work to tight deadlines. Always have a plan 'B' for your speakers and get a copy of their presentation in advance. It is also advisable to keep an up-to-date copy of all your event-based correspondence, including email, and publicity in one file, on your computer and backed up, of course.'

Be prepared!

EVENT PLANNING GROUP

A key factor to a successful event lies within the planning processes. It is the experience of many organisations that the lack of time and capacity can undermine events and lead to problems on the day.

The setting up of an Events Planning Group can ensure that a systematic and fully understood approach can be developed which will oversee the planning, delivery and evaluation of a successful event.

For the purpose of the toolkit, we define an Event Planning Group as a group of no more than five members of the organisation - drawn from management committee members, event co-coordinator, staff and service users - who will oversee the planning and implementation of the event on behalf of the organisation. The life of the group is time limited and each member will have specific tasks allocated to them related to their role within the organisation.

An Event Planning Group is a group of no more than five members of the organisation who will oversee the planning and implementation of the event on behalf of the organisation

ROLE AND RESPONSIBILITIES OF THE GROUP

A first step in establishing the membership, roles and responsibilities of the Steering Group is to agree the exact purpose of the event and who is important to making it happen within the organisation. One way for this to be achieved is for the organisation's management team to undertake a version of a SMART analysis exercise.

SMART analysis

The basic premise to this is that all objectives should be **SMART**, meaning that the planning process should enable any subsequent processes to be:

- Specific
Being precise about what you are going to achieve
- Measurable
Quantify your objectives
- Achievable
Don't attempt too much
- Realistic
Do you have the resource to make the objective happen (people capacity, finances/funding, equipment, materials, time)?
- Timed
State when you will achieve the objective(s) - within a month? Six months? A year?

Examples of SMART headings

- Fundraising
To identify a specific amount of funds within the organisation and externally in order to fully resource the event
- Positioning objectives
To ensure that the event seeks to include representatives of communities often excluded, such as young people and refugee groups
- Promotional objectives
To increase awareness of the experiences of lone parents in your area to local government
- Survival objectives
To survive the current local authority funding cuts
- Growth objectives
To increase your pool of volunteers from five to 20 by the end of the year
- Branding objectives
To make our organisation's brand synonymous with efficiency, high quality service delivery

Exercise

Using the SMART example objectives as a guide, come up with three key objectives linked to your forthcoming event that fully capture its purpose and will guide you as to the type of event you want.

Start by selecting three categories, eg Promotion, Fundraising, Positioning, and build upon them. Ensure they meet all five of the SMART criteria.

When complete, check if each objective answers the key question: *What type of event do we want and how are we going to plan and deliver it?*



SMART objective 1

SMART objective 2

SMART objective 3

CHECKLIST FOR THE PROCESS OF RUNNING A PLANNING GROUP

Once the aims of the event have been agreed, the setting up of the Planning group, its membership and the outline of its role can be established.

Below is a model checklist for how the Group might operate:

- Regular meetings, chaired by lead manager and recorded action/task lists
- Feedback of actions taken to management committee by the manager responsible for the overall co-ordination of the event
- Communication to all managers and staff as to make up and role of the Steering Group
- Fixed agenda, covering issues outlined below

One of the key tasks of the planning groups will be to identify areas of expertise covered by your organisations, and which areas of work they are willing to undertake. By creating a range of 'bite-sized' activities you won't need to force people to do more than they are willing to do.

It is important to establish lines of communications - you should know who is working with whom, on what working group and topic. There is also a role for a 'progress chaser' - following up offers of help or interest are very important and reminder letters may be needed. The first thing to remember when setting up a planning group is that you will need to find a balance between having a clear plan at the outset and being flexible as the work develops.

As you progress, and your group begins to uncover new issues, you may be tempted to follow new leads and go off at a tangent. Stop and think - are you going to go with the flow, or pull yourselves back to what you originally set out to do?

CHECKLIST OF TASKS TO BE PERFORMED BY MEMBERS OF STEERING GROUP

- The plan
- The programme/agenda
- The invitation list
- Publicity/Media contact
- Venue
- Management of budget
- Speakers and entertainment
- Role of Chair
- Protocol
- Parking, escorting, stewarding
- Miscellaneous
- After the event

Shortly before the event, you need to run through the day in detail:

- Where will everybody be on the day?
- Is the rota full or do you need to do a last-minute ring round to fill some gaps?
- How will equipment and volunteers get to the venue - and away again?
- Will you be able to take hired equipment directly to and from the event, or will it need to be stored?
- Who is responsible for money on the day?
- Do you have enough time, materials and people for setting up and clearing up?

TIMETABLE OF ACTIONS

Six months ahead of time

- Set goals for your event
- Start looking into facilities
- Decide who will attend.
- Start looking into possible presenters/consultants

Four months ahead of time

- Decide how long the event will be
- Pick a date for your event
- Assign planning duties
- Come up with a rough schedule
- Reserve a venue

Two months ahead of time

- Finalise the event schedule
- Find out about your consultant's needs, if applicable
- Send out invitations and notices, if applicable
- Make any final decisions about accessibility
- Make transport arrangements, if applicable

One to two weeks ahead of time

- Check with venue to finalise arrangements
- Round up equipment/supplies
- Make final catering arrangements, if applicable
- Do any needed photocopying

One day before

- Go over agenda a final time
- Check with committee heads, if applicable
- Relax!

Evaluate the event

- Were objectives met?
- How were the facilities?
- Which aspects of the event were the most useful in advancing your organisation's cause?
- Which aspects were the least useful?

GENERATING OWNERSHIP TASK

It is important that all in the organisation feel an ownership of the event. An important ingredient is to allow staff, volunteers and stakeholders to be independent thinkers and for them to have a sense that they are truly making a contribution to the process. It is also important that they have an idea of how progress will be communicated and how often and in what format. In short, people need to feel that they see the relevance of the event and their role within it.

This will ensure not only positive approach and enthusiasm for the event but also ensure that expertise; experience, skills and ideas within the organisation are fully utilised.

**KEY QUESTIONS**

Think about the following and write notes for yourself.

- 1 How would you generate ownership?
- 2 What initial challenges or obstacles do you anticipate facing in pursuing this goal?
- 3 Who would you target (internally and externally), why and how as part of stakeholder consultation?

4 What would you have to consider, and include, to make your plans socially inclusive?

5 How would you publicise your plans?

6 What forums and styles would you implement to gauge and elicit your target audience's opinions?

7 What type of skills and expertise are you looking to utilise from staff and stakeholders?

EVENTS MANAGEMENT RESOURCE ALLOCATION CHECKLIST

Date	Task	Timescale	Whose responsibility	Criteria	Feedback required	Funds allocated	Funds required
	Event theme	Prior to the event	Steering group	Must fit in with the mission/vision/values of the main organisation	To the individuals involved in organising the event and potential participants and funders	n/a	n/a
	Organising steering group	Up to a month before planning starts	Lead organisation	Pick individuals for the skills and abilities to make event a success rather than availability	Management committee or funders may require information	Expenses for participation will need to be considered in the overall budget	Approximately 5% of overall costs
	Allocating responsibilities	Within one month of steering group meeting	Lead organisation	Responsibilities should be allocated based on steering group members' skills and availability	Steering group should meet monthly and feedback will be required on tasks at every meeting. Emails and telephone communications can take place in between	Expenses will be required dependent on the task	Dependent on task
	Administration	Throughout event management	Steering group	Ability to take minutes of meetings, send out invitations and receive responses and deal with queries	Minutes at meetings, letters and responses to invites	Costs for minute taking, correspondence, postage, photocopying	Proportion of individual's time allocated to administrative tasks

Date	Task	Timescale	Whose responsibility	Criteria	Feedback required	Funds allocated	Funds required
	Fundraising	During the planning stage for the event	Steering group	If external funding is required, this needs to be identified in the early planning stages of the event and should be the first task of the steering group	As funding is key to the event, feedback will take place at early meetings of the steering group	Cost of steering group members' time in seeking funding	n/a
	Venues	At least six to nine months before the event	At least three steering group members should visit a variety of venues	Venues should be chosen for their accessibility rather than cost	Steering group members should be provided with information on venues so that the whole group makes an agreed choice	Expenses for visiting venues	Up to 40% of overall costs needs to be allocated
	Catering	At least three months prior to event	One steering group member	A variety of caterers need to be approached to ensure that food provided meets the diversity of those attending the conference Flexible catering with seasonal variations that can meet special dietary requirements	A variety of menus and costs need to be discussed and agreed by steering group	Minimal	Up to 25% of overall costs

Date	Task	Timescale	Whose responsibility	Criteria	Feedback required	Funds allocated	Funds required
	Speakers	Six to nine months prior to event	The steering group should develop a brief for what they need from the speakers	Based on the theme and the context of the event, speakers should be chosen for their ability to put a message across and keep the audience involved	Responses to requests for speakers should be discussed at steering group meetings	Agree approximate figure for speakers	Approximately 10% of costs
	Workshop leaders	Three to six months prior to event	The steering group should develop a brief for what they need from the workshop leaders	Based on the theme and the context of the event, workshop leaders should be chosen for their ability to actively engage participants in meaningful discussion	Responses to requests for workshop leaders should be discussed at steering group meetings	Agree approximate figure for workshop leaders	Approximately 5% of costs
	Chairperson	Three to six months prior to event	The steering group should develop a brief for what they need from the Chairperson	Based on the theme and the context of the event, the Chairperson should be chosen for their ability to keep the event flowing and to time	Request for the Chairperson needs to be discussed at steering group meetings	Agree approximate figure for Chairperson	Up to 10% of costs

Date	Task	Timescale	Whose responsibility	Criteria	Feedback required	Funds allocated	Funds required
	Organisers	Formed with Steering group	Made up of steering Group members	Pick individuals for the skills and abilities to make event a success rather than availability	Steering group should meet monthly and feedback will be required on tasks at every meeting; emails and telephone calls in between	See other categories	Up to 10% of costs
	Receptionists	At least a month in advance	Made up of steering group members	Good communication skills	To steering group during and after the event	See other categories	Up to 10% of costs
	Recorders	At least a month in advance	Recruited by steering group members	Ability to take minutes or to use audio typing	Briefed before and after the event by steering group	See other categories	Up to 10% of costs
	Publicity	Once theme and venue and speakers agreed	At least two steering group members	Previous experience of successful publicity	Regular monitoring by steering group, information provided to management committees and funders	Agree quantity, quality, number and types in advance	Approximately 2% of costs
	Programme	Three months in advance and then two weeks in advance	Steering group	Based on the theme and the context of the event	Agreed at steering group meeting	Cost included in publicity	Up to 10% of costs
	Final report	Before and after the event	Steering group	Context, format and process for production agreed prior to event	Final editing agreed at steering group	Editing, printing and postage	Approximately 5% of costs

VENUE

Identifying a suitable venue is a crucial part of effective events management.

Some organisations have the capacity to host events at their own premises or have a long-standing arrangement with another organisation such as the local council. However, for many, such facilities are neither easy to come by nor appropriate for a variety of reasons, ranging from cost to location.

There are a number of key aspects to getting it right around choosing the most appropriate venue for your event.

Before choosing a venue, take into consideration the following issues so that you don't limit yourself choosing the place before determining what you really want.

- Does your organisation have contacts/partnerships, which could identify a suitable venue?
- What is your budget for hiring of space?
- What size of venue do you need?
- Do you require break-out rooms?
- If you are providing refreshments, are there facilities to use a kitchen with food stage?

Identifying a suitable venue is a crucial part of effective events management

CREATING A SAFE AND ACCESSIBLE VENUE

The health and safety of all attendees at the event is of the utmost importance when you are deciding on a venue and planning the layout of the event.

In practice this means that organisers should do their best to ensure that the venue they chose for their event is fully accessible. In addition, remember that under the Disability Discrimination Act 1995, all service providers, including those planning events and conferences, must:

- Not discriminate against a disabled person
- Make reasonable adjustments so that a disabled person can use the service
- Not make it impossible or unreasonably difficult for a disabled person to use the service.

CHECKLIST OF ISSUES TO CONSIDER

When you are choosing a venue for your event you need to consider the following access issues.

- Access for those in wheelchairs
- Loop systems and clear signage
- Information in Braille and appropriate print and translated into relevant languages
- First Aid point with trained operatives
- Sign language interpreter for performances and speeches
- How will people get to the event?
- Ensure your publicity gives details of public transport and parking. Will you need to put up signs in the surrounding streets to make the event easy to find?
- Is childcare available?
- Does it have good public transport links?
- Does it have adequate parking facilities for disabled people?
- Does it have level or ramped entry at the main entrance?
- Is there ramped or lift access to all conference/workshop areas?
- If there is lift access, is the lift big enough (8 person lift or 1.2m x 1.5m)?
- If there is lift access, are the lift controls accessible (raised or Braille and at an accessible height)?
- Are the rooms large enough to allow large powered wheelchairs to turn?
- Does the venue have accessible toilets (minimum cubicle size 1.5m x 1.2m) with grab rails?
- Does the venue have good acoustics and lighting?
- Are there clear signs for the toilets, fire exits etc?
- Is there adequate seating (a choice, with/without arms)?
- Is there space for wheelchair users (not separate from other people)?
- Does the venue have a hearing/induction loop?
- Is there space for a prayer room?
- Bookings, permissions and licences

Find out about the regulations early on - it can take months for some licences to be granted. You may need to consider: Public entertainment licence, Alcohol licence



You are on the management committee of a planned Heritage Centre in the borough. The centre aims to be accessible to all residents in the borough and reflect their history and current lifestyles. A major part of the management committee's work is to ensure that in planning the heritage centre all aspects of access are considered.

Using the grid below, note down how the Centre may be accessible for the following groups.

Group	Example	Your own example
Black and ethnic minority communities	Translated directions	
Older people	Good transport links	
People who are disabled	Loop system	
Parents	Childcare	
Religious groups	Access to a prayer room	

MEDIA & PROMOTION

People don't want to be marketed TO; they want to be communicated WITH.' (Flint McLaughlin)

PUBLICITY PLANNING – EARLY CONSIDERATIONS

When beginning your publicity campaign for your event, it is important to know why you are doing it and what you expect from attracting publicity for your event. Of course, this requires that you plan properly for it to be successful. A good starting point is being clear about the *five Ws*.

- Who
- What
- Where
- Why
- When

Who

WHO is putting on the event?

Describe what your organisation or group is - your mission statement, what you offer, your branding (image and logo).

WHO is the event for?

Describe your target audience. Why them? How are you going to reach them? Are you in a position to reach them?

What

WHAT is happening?

Describe the event or activity to be publicised.

Where

WHERE is it happening?

List all the relevant locations for the specific tasks, eg from where to pick up a pamphlet, buy tickets or attend the event.

Why

WHY is it happening?

List your general goals and purposes for the event or activity.

List the specific objectives for the activity in measurable terms (see SMART objectives under the Event Planning section).

When

WHEN is it happening?

What is the best way to turn the five Ws into an effective publicity and promotional campaign? Decisions about timing, using the media and the delegation of responsibilities will require good coordination as each area impacts on the other.

TIMING

As we've already highlighted in under Event Planning, it is important to work backwards from the date of your event.

Among your considerations are:

- The optimal release time of publicity
- Deadlines for adverts, press releases, and articles
- The time it takes to produce promotional materials: from writing and design to printing and distribution and the type of publicity material you are going to choose - newsletter, pamphlet, press release, leaflet or email flyer.

Budgets

Good publicity doesn't have to be expensive but you also don't want it to look cheap. But always plan to your anticipated budget.

Among your considerations are:

- What funds are available within your organisation
- Any possible donations or potential sponsors
- Possible hidden costs
- Free publicity available through partner organisations or other sources

Always plan to your anticipated budget.

MEDIA AND PROMOTIONS MIX

As no two events are ever the same, you must know your media and promotional options so you can choose the best tools to suit your goals, organisation's ethos and personality.

It is essential that you are clear about your message (*see core messages section*) as you will not just be hosting an event, you will be communicating a theme, raising awareness of a pressing issue such as cancer, the experiences of lone parents or refugees, or celebrating an achievement. In the end, the aim is to tailor your message for your target audience, which may be more than one group of people.

What is Promotion?

Promotion keeps your event in the minds of the target audience and helps stimulate demand for the product/services through the use of advertising, publicity and the media.

What is PR?

Public Relations is 'the deliberate, planned and sustained effort to establish and maintain mutual understanding between an organisation and its publics' (Institute of Public Relations).

PR ensures that your organisation has a strong, positive public profile and image, often through the media or events. Relatively cheap and successful strategies tend to be long-term with in-built plans for all eventualities.

What is Media Relations?

Media relations is when you pursue activities that involve working directly with media professionals responsible for editorial (news and features), public service broadcasting and sponsorship of mass media. It relies on an organisation working proactively with the media.

How you define the media depends on your organisation, target audience and event type. This will help you to determine who best to approach from the black and minority ethnic media, community radio, specialist magazines, partner agency publications or talk radio.

A press release is a key tool.



Mis/perceptions of media & promotion

To ensure that you are clear as to why you are engaging the media and other promotional outlets, list 10 benefits and 10 drawbacks of pursuing any form of media and promotion.

Where possible, give an example to illustrate your choices. This will allow you to see where there are misperceptions and potential blocks that can be tackled in advance of implementing your publicity plan. It will also enable you, within your planning group, to identify useful skills and workable alternatives.

Benefits	Drawbacks

TEN COMMON MEDIA AND PROMOTION MISTAKES

1 Not knowing your target audience

Be clear about who your target audience is for your publicity plan. Gear your publicity plan to attract their attention. Trying to appeal to everyone will not work.

2 Inconsistent promotional efforts

All of your advertisements, promotional materials, media and publicity planning should have the same look and feel.

3 No diversification

Just getting an advertisement in your local newspaper or a brief mention on a partner organisation's website is not enough to reach your target audience. Take steps to market your organisation creatively through a cross-section of media from a feature in a local newspaper, having your leaflet in the conference pack of a national event to a television interview: that way customers/service users become familiar with your brand and services at different times in different environments.

4 Ignoring the value of longstanding service users or partners

In VCOs, it is about how service users or customers portray you to the wider community either as referrers, potential volunteers or sources of case studies and good practice. Publicity campaigns or plans can focus heavily on bringing in new clients, funders or partners and not build relationships with current ones or produce appropriate follow ups.

5 Poor timing

Timing your publicity plan to coincide with an upcoming event makes sense and is cost effective. This typically means preparing well in advance.

6 No clear message

You can miss your target audience with promotional messages that are contrived, confusing, too subtle or too long. What's the point of devising the most ingenious publicity plan if no one gets it?

7 Trying too hard

By making your event sound too good to be true, or by making overly optimistic goals, means that is probably the case. Excessive hype will turn people away and imply a lack of substance.

8 Putting all your eggs in one basket

Blowing your entire publicity budget on one expensive newspaper or radio advertisement will leave you with nowhere to go. Positive publicity planning means building up your reputation over time through well thought out, relevant, but ongoing exposure.

9 Failing to get feedback

It is worthwhile to test out your publicity ideas before your event with your steering group and/or a small sample group representing your target audience.

10 Making a change for no reason

You may be tired of or lose confidence in your publicity plan before the launch. But this does not mean it is not working. Those who develop plans change them because they think they have to. Be patient as some of the most positive results come after an event.

PROMOTING EQUALITIES

When promoting your event the needs of different client groups need to be taken into account in a holistic manner.

Some of this will already been addressed at the planning stage with your event management steering group - which is why it is useful to use the information gathered from that process to help you to tailor the publicity material accordingly.

For example:

- Outlining provision of childcare and disability access such as loop systems, transport, signers, Braille material
- Publicity material - the use of language, font size, whether any of it needs to be translated into another language
- Publicity material - how people will be able to access the material (online, through direct mail, etc) and if it is accessible to those with disabilities, from visual impairment to those who are deaf or who have learning disabilities
- External networks and groups where you can publicise the event, such as places of worship, youth clubs, mothers and toddlers groups
- Ethnic diverse publications and other media outlets targeted at BAME publications from Eastern Eye (Asian), New Nation (African Caribbean) or ones in the native language
- Being aware of cultural and religious festivals and holidays.

Top tips for promoting your event to people with disabilities

- If you promote your event on a website, check that it is accessible and compatible with the range of specialist hardware and software which disabled people use to access computers. RNIB have an online Web Access Centre where you can find out more about this.

webaccess@rnib.org.uk

- If you do not already have a contact point, consider providing one. It is unlikely you will be able to provide all the information you have in your promotional material.
- If you give a telephone number as your contact point, you could also give an email address, fax number and a postal address. Some disabled people have a preference for one or another of these. Offering more than one choice as a reasonable adjustment for disabled people will mean more choice for everyone.
- Make sure that staff at the contact point can answer questions about access.
- Use a large font size in a clear style and good contrast for text and background on all printed material. You can find out more about this in the section on 'Making information accessible'.

Source: *Creating Accessible Events*, published by the Disability Rights Commission, 2004.

USEFUL RESOURCES

For a list of ethnically diverse media, visit

www.cre.gov.uk

For information on publicising material for disabled people, visit

www.drc.gov.uk

You can get a copy of *Creating Accessible Events*, from the Disability Rights Commission.

Telephone: 08457 622 633

Textphone: 08457 622 644

(You can speak to an operator at any time between 8 am and 8 pm, Monday to Friday)

Fax: 08457 778 878

Post: DRC Helpline, FREEPOST MID02164, Stratford upon Avon CV37 9BR

or you can download the guide from its website.

PUBLICISING YOUR EVENT: CASE STUDY

Organisation: Urban Partnership Group

Event Type: Launch

Event Title: Pedal Power London

About the Urban Partnership Group

The Urban Partnership Group (UPG) is a community regeneration agency pioneering sustainable development and social enterprise in west London. Established in 1997 and based in the London Borough of Hammersmith & Fulham, UPG provides a wide range of services for the Third Sector from vocational training, capacity building and working with refugee and asylum seekers.

About Pedal Power London

Pedal Power London is a 12-month pilot to create a supported network of cyclists among 50 VCOs, public sector organisations and schools in west London.

Why launch Pedal Power London

Despite its local success and government recognition - UPG won the Transport for London Technology Award 2005 for an automated bicycle hire scheme - the UPG had only attracted occasional local media coverage. By launching Pedal Power London, UPG wanted to raise its profile outside of west London, promote its good practice and work with the Third Sector, generate new partnerships and debate on health, fitness and community engagement in line with the organisation's ethos on sustainability and social cohesion.

Launch details

- Held in Lyric Square, Hammersmith
- Stage for speakers
- Award ceremony for primary school winners of Pedal Power bicycles
- Stalls for bike specialists
- Seating area for guests
- Marquee
- Back up venue nearby (Emerald Centre) if weather was harsh
- Refreshments and 'goodie bag'

Promotional objectives

- To attract 100 people from diverse groups including VCOs, schools, parents, children, cycling specialists, to the launch
- To attract publicity from the local media, council media and cycling magazines
- To raise its profile in west London
- To raise awareness of the Pedal Power pilot and core aims

- To attract members to join the Pedal Power pilot
- To cultivate relationships with specialist and local journalists
- To raise funds

Event promotion: planning steps taken

- Four month lead time for promotion strategy
- Clear leadership from the executive director
- Board presentation to sell the promotion vision and identify the funding
- Identification of key spokespeople within and outside the organisation on different specialisms
- Identification of organisations taking part in the pilot as case studies.
- Evaluation of past and present communication channels and their effectiveness
- Preliminary talks with local journalists about what they would need and about the planned launch to attract consistent coverage.
- Drafted list of media to be targeted and how.
- Drafted media coverage schedule to get coverage before the launch.
- Identification of three core messages to promote the launch and initiative
- Identified possible story ideas based on the core messages, the organisations and groups being targeted by the pilot and why the pilot was being established.
- Endorsement from cycling celebrity
- Production of an email invitation
- Production of a press release two weeks before the launch
- Promotion of Pedal Power London on organisation's website three months before the launch
- Creation of Pedal Power London vouchers scheme for potential members
- Competition launch for primary schools to win a free Pedal Power London bicycle

IDENTIFYING YOUR ORGANISATION'S CORE MESSAGES FOR YOUR EVENT

Before you put your organisation into the media and public spotlight through hosting an event, your messages have to be clear and effective with your target audience clearly in mind. The media (from the local paper, specialist magazine to a national radio talk show) is your cost effective way to get your message across. The information gathered here will help you when producing your publicity materials such as press releases and 'selling' the event. It is also a blueprint for key spokespeople to facilitate coherence and consistency of message.

Media mission statement

A media mission statement is like your organisational mission statement, but is shorter and simpler. It should highlight your purpose and unique selling point - preferably in no more than 18 words (25 maximum). It encapsulates who you are, what you do and your purpose. Your media mission statement comes before your core and secondary messages.

Your media mission statement comes before your core and secondary messages.

Example

Pedal Power London, launched by the Urban Partnership Group, will create a supported network of cyclists among voluntary and public sector workers in West London.

Core or 'primary' messages

These clarify the main themes that underpin the objectives of your media and promotion strategy, your event and objectives that you are promoting. They represent the 'primary' views that you want to represent about your organisation through your event. It is best to have three. Look at them as your three main aims.

They are devised with your primary target audience in mind. Who are they? What do you want them to hear and/or know about your organisation and event? As with the mission statement they should not be more than 25 words long. The best core messages are memorable and express your organisation's personality.

It is best to have three.

Example

Pedal Power London was launched to promote the health, environmental and monetary benefits of cycling for everyone, particularly, workers, employers and young people.

Secondary or 'reinforcement messages'

These back up your core messages and also have your secondary target audience in mind. They add weight to your core messages by providing actual examples and/or evidence to back up your statements and highlight the value of your organisation, in practice. Draft no less than three and no more than five; again, no more than 25 words.


Example

Pedal Power London is also working with local employers to promote the use of cycle power as a means of transporting employees to their office, meetings and clients.

Evidence: The Pedal Power London pilot has so far signed up 30 organisations such as CITAS, a translating service. They have taken three Pedal Power London bikes and have already seen the benefits for their freelance translators who find it useful to get to and from different clients around west London in terms of health and time management.


CORE MESSAGES WORKSHEET

Step 1: Media mission statement



A large empty rectangular box for writing a media mission statement.

Step 2: What are your three core messages?



One

Two

Three

A large empty rectangular box for writing three core messages, with the words 'One', 'Two', and 'Three' positioned on the left side to indicate the order of messages.

Step 3: Five secondary or 'reinforcement messages'



One (Write your secondary message below.)

Give an example to back up your message, eg statistics, project outcome.



Two (Write your secondary message below.)

Give an example to back up your message, eg statistics, project outcome.



Three (Write your secondary message below.)

Give an example to back up your message, eg statistics, project outcome.



Four (Write your secondary message below.)

Give an example to back up your message, eg statistics, project outcome.



Five (Write your secondary message below.)

Give an example to back up your message, eg statistics, project outcome.

MEDIA & PROMOTION TOOLS: A SELECTION

How to choose

Select your tools in line with your publicity plan. Think about your available resources, timeframe and most effective means to communicate your key messages. Also schedule what you are going to use and when with an idea of how they will be followed up.



Press Releases

Why?

When?

Deadline?



Customer Satisfaction Surveys

Why?

When?

Deadline?



Campaigns and Lobbying

Why?

When?

Deadline?



Advertising

Why?

When?

Deadline?



Brand Awareness

Why?

When?

Deadline?



Media Relations

Why?

When?

Deadline?



Public Relations

Why?

When?

Deadline?



Internal Publications (Newsletters)

Why?

When?

Deadline?



Fundraising

Why?

When?

Deadline?



e-Promotion

Why?

When?

Deadline?



Publicity Materials (leaflets, pamphlets, etc)

Why?

When?

Deadline?



Third Party Endorsement

Why?

When?

Deadline?



Direct Mail

Why?

When?

Deadline?



Sponsorship

Why?

When?

Deadline?

PRESS RELEASES

A press or 'media' release is the most basic tool of communicating information to the media. Produced well it can attract a productive response from journalists. Produced badly, it will be immediately thrown away.

Newspapers, magazines, broadcasters, forward planning desks and online media receive hundreds of press releases every day so you have to make yours stand out.

Before you start ...

- Find out to whom the press release should be sent - news editor, features editor, picture editor, business editor, enterprise editor, health editor, etc.
- Target more than one person/programme/department on the same newspaper, magazine or TV/radio show.
- If it is for TV/radio, send to the appropriate programme - find out who the producer and researcher are and also send it to the forward planning desk.
- Always follow up your press release with a phone call within two days - be prepared to immediately email/fax over another copy if they did not receive it.
- Email and fax a press release two to three weeks before your event when it is a weekly publication; this usually applies to the specialist press and BAME publications, and two weeks to 10 days on a daily publication. On a monthly publication, two to three months before, though it is worthwhile interesting them in the idea verbally first as you may not have produced a press release in that time.
- Always find out their production/publication deadlines so you send it at the right time - this applies to charitable magazines and newsletters.

HOW TO WRITE A PRESS RELEASE

- What is the *key message* that you want to get across?
- Use *headed paper*, with your organisation's logo and contact details clearly listed.
- Put the words '**press release**' in bold at the top or '**news release**' if the issue being covered is topical and immediate.
- Put either an *embargo* date or put '*for immediate release*', with the release or issue date. When you use the embargo option, you need to put 'embargoed until 00.01 am' with the release date that you want after it.

This option is useful when you are launching a new service or research, raising awareness of a challenging, sensitive or enlightening issue or hosting an event where you are going to make an important or controversial announcement. Having an 'embargo' on your release enables you to issue your release in advance, which allows you to negotiate more in depth and/or considered coverage in advance of your launch or announcement. Journalists very rarely break an embargo, so it is a good bargaining tool.

- Think of a *short snappy title* or quote as a headline, which summaries the press release. Make it bold, a larger font size and underline (optional). Make sure that the copy (text) that follows

justifies the headline or it will not be read fully or taken seriously.

- Answer the five 'Ws' by the first paragraph. If pushed, no later than the second paragraph:

Who - are you?

What - are you launching/hosting? What are your aims?

Why - are you writing this press release and why does the media need to know about your event?

When - is the event/action happening?

Where - is the event/action taking place? - give times, dates and location

The following paragraphs should add more detail in *descending* order of importance.

- There should be at least *two strong quotes* from relevant spokespeople to reinforce the message being presented in the release. Their name and job title or status, eg service user, should be spelt out in full before the quote appears.
- Use *double line spacing* to make it easier to read. This allows the journalist to make comments in the spaces as to how they want to follow your 'story' up. The spacing also forces you to be succinct, as you will have fewer words to play with.
- Try to make your press release *no longer than two sheets of A4*. If your release is two pages, put mf ... ('more follows') at the end of the first page to let the journalist know that the release isn't finished. When you finish the main text of your release put '-ends-' to let the journalist know that the main content of the release is complete.
- After you have written the main body or text of the press release, you have the *Notes to Editor* section. This is where you place any relevant background information that could not feature in the main press release. For instance, put a paragraph about your organisation, detailing when you were launched, your core aims, how you are funded, sponsored or your turnover, and any partnerships you are engaged in.
- Still with *Notes to Editor*, if the press release is about an event, you would need to put the *full details of the event* including set times for journalists/photographers to interview/take pictures of key speakers, for example.
- You also need to *list key contacts* (keep the list short and relevant) that journalists can approach for more information. List their email addresses and telephone/mobile numbers. Also note the times and days they are available if they work part-time.
- Avoid jargon, flowery language and jokes.
- It is advisable to get someone else to *proof your release*. It is also useful to read it out aloud to see if any of your sentences are too long or don't make sense.
- Check to see if and when any coverage is going to appear so you can either be sent or purchase copies.

An example of a good press release is reproduced below.

1/2



FOR IMMEDIATE RELEASE: Thursday 10th November 2005

NEWS RELEASE...NEWS RELEASE...NEWS RELEASE

NEW WEST LONDON CYCLING PILOT TO CREATE 'PEDALLING' NETWORK OF WORKERS AND SCHOOL CHILDREN IN THE WAKE OF 7/7

CHANNEL 4 NEWS READER JON SNOW ENDORSES THE INNOVATIVE SCHEME

The Urban Partnership Group (UPG) will announce plans to create a cycling network of over 50 public and voluntary sector organisations and schools in west London at the launch of its 12-month pilot - **Pedal Power London** - on **Wednesday 16th November at Lyric Square, Hammersmith.**

In the wake of the 7/7 bombings, 50,000 more cyclists are on London's roads with a 50% increase in bike sales, a trend mirrored in west London. Pedal Power London has responded to the growing demand for bikes and road safety information by recycling 150 abandoned or donated bicycles for public and voluntary sector workers and school children as part of a membership scheme.

Participating organisations will:

- Pay £40 for each recycled and Pedal Power-branded bike and £10 annual membership, with discounts for schools and community groups
- Receive a free two-hour Cycle with Confidence course with Hammersmith & Fulham Council and Cycle Training UK
- Access regular workshops on diverse topics such as bike maintenance
- Attend fortnightly bike surgeries with the first two hours of repairs free
- Have the opportunity to gain a recognised qualification in bike maintenance and other skills
- Be part of a professionally 'supported' network of cycling members led by UPG

Jon Snow, Presenter of Channel 4 News who has cycled to work for 35 years, said:

"As someone who uses his bike for work far more than for play, I wholeheartedly endorse the Pedal Power London project. Anything that gets more adults and children safely onto the roads on bike is a double plus. It saves on carbon emissions and burns carbohydrates in one go."

Gordon Keenan, Executive Director of the Urban Partnership Group, said:

"In the wake of 7/7, cycling in London is no longer simply an extra curriculum activity. It is now a fundamental and sustainable transport alternative that saves money, helps the environment and improves our health. Our aim in launching Pedal Power London is to give west London staff in public, voluntary and community groups and school children viable and effective choices to meet their diverse travel needs."

mf....

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2/2

Cllr Stephen Burke, Leader of Hammersmith & Fulham Council, said,

"We welcome any initiative that gets more people cycling, more safely and more often. Pedal Power London is a worthwhile and imaginative project. As a regular cyclist myself, I am pleased that local workers from community groups, voluntary organisations as well as school children will now have the opportunity to cycle to work or school rather than drive or take public transport."

As part of Pedal Power London's launch, nine Hammersmith & Fulham-based schools will each receive a free bike and membership after entering a borough-wide competition.

Penny Kinnear, Deputy Head at Flora Gardens Primary School, one of the Pedal Power London bike winners, added:

"We are excited to have won a Pedal Power London bicycle. It will be used by our site manager who has to travel some distance on various errands, a number of staff are keen on cycling both for pleasure and exercise during their lunch break and children taking their Cycling Proficiency next summer term can use it for extra practice."

Keynote speakers at the Pedal Power London launch include Cllr Stephen Burke, leader of Hammersmith and Fulham council and Melanie Smallman, Cabinet Member for Education. There will also be stalls, workshops and demonstrations from a range of agencies such as the London Cycling Campaign, Cycle Training UK and Transport for London (TfL).

- ends -

NOTE TO EDITORS

The Urban Partnership Group is a community regeneration agency that pioneers sustainable development and encourages social enterprise in west London. Since it was established in 1997, the UPG has attracted over £10 million in investment to Hammersmith & Fulham. In March 2005, UPG won a TfL Technology Award with Hammersmith & Fulham council for an innovative cycle hire scheme.

Pedal Power London (www.pedalpowerlondon.org) is a new start social enterprise working in partnership with the UPG and Hammersmith & Fulham council with additional backing from organisations such as Cycle Training UK (www.cycle.training.uk) and the London Cycling Campaign (www.lcc.org.uk). The pilot is funded by the UPG and a £4,500 grant awarded by Hammersmith & Fulham council from the TfL's Good Going fund. So far 30 organisations have signed up for the pilot.

THE PEDAL POWER LONDON LAUNCH will take place on Wednesday 16th November from 1.30pm to 5pm in Lyric Square, Hammersmith.

There are six places for non-cycling journalists on the 'Cycling with Confidence' course, compliments of UPG and Hammersmith & Fulham council, between 10.30am and 1pm on Wednesday 16th November. To book ASAP, please contact Tara Thomas (**see Contacts below**).

Winners of the Pedal Power London Hammersmith & Fulham primary schools competition: Bentworth . Flora Gardens . Kenmount . Normand Croft Community . Peterborough . Queen's Manor . St Peters C of E . St Stephens C of E . St Thomas of Canterbury RC.

CONTACTS:

Pedal Power London – Tara Thomas (tel/email/mobile would go here)

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EVENT PHOTOGRAPHS

If you are taking photographs at your event, try to take them with a digital camera. This way you can download the images quickly to a computer and send them to the relevant publications or online media immediately after your event.

When you issue your press release, also send it to the 'picture editor' as they are keen for photo opportunities.


Photographs allow any print media coverage of your launch to take up more space in the publication. Images are also the first thing readers' eyes are drawn to.

Always make sure that any images emailed or sent out as prints are clearly captioned with details of the event, who is featured, their job title and the location.

Always get permission for use of the photographs, particularly if they feature clients. You may have to get them to sign a model release form.

GENERATING INTEREST

There are many way of generating interest in your event (some of which has been outlined in the Pedal Power London case study), from emailing an invitation to named individuals (journalists, potential funders and attendees).

 <p>pedal power WAY TO WORK</p>	<p>pedal power THE HEALTHIER</p>	<p>PEDAL POWER LAUNCH EVENT</p> <p><i>We are delighted to invite you to our Pedal Power Launch Event on the 16th November 2005 in Lyric Square, Hammersmith 1.30 pm for 2.00pm</i></p> <p>Speakers will include: Stephen Burke, Leader of Hammersmith & Fulham Council Melanie Smallman, Cabinet member for Education</p> <p>Stallholders will include: London Cycling Campaign Transport for London - Good Going Campaign</p> <p>RSVP before 9th November by: <i>(E) info@pedalpowerlondon.org</i> <i>(T) 020 8746 2120</i></p> <div style="text-align: right;">  </div>
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Coming up with ideas in advance of your launch in 'trailer articles' (see Pedal Power London trailer article, *Guardian* link).

<http://society.guardian.co.uk/societyguardian/story/0,7843,1559073,00.html>

But all this will not be worthwhile without approaching journalists in a well-prepared and timely manner.

TIMING

Knowing the best time to produce and issue your publicity relies on a number of factors highlighted in this section, from knowing when journalists have press deadlines to when people are free to attend.

It is also important to be aware of local and national events, including religious holidays that may clash with your event, render your event's timing inappropriate or take your core audience. It is worthwhile drafting your own events calendar to coincide with the period you are planning to host your event.

APPROACHING JOURNALISTS

Journalists are always keen for a good story, examples of good practice and case studies. It helps if they are topical and human interest-led. But how you do that can make the difference between getting, and not getting, the coverage that you want.

The journalists' view

Laura Smith *The Guardian* (daily)

'My advice for getting the event covered would be to:

- Identify a journalist that has either previously written about the subject or otherwise expressed an interest in the area or that the organisation already has a relationship with
- Flag up the event well in advance (a month or so) with a phone call to that person
- Follow up the phone call with an email containing clearly-written information about the event and what it is expected to find/deliver, without overloading the journalist with too much info
- Make another call a week or so before the event to remind the journalist again and find out if they are going to cover the event.'

Mariah Ahmed *Community Care* magazine (weekly)

'Organisations that take time and effort to find out press deadlines and work in advance of them are usually the most successful. Preliminary chats to find out who the relevant reporters are, and what angle they would be interested in are essential to start with. This should be accompanied by to-the-point press notices and plenty of follow-up calls to act as reminders in the run-up to any coverage.'

Catherine Jackson, editor, *Mental Health Today* (monthly)

'I really hate being rung up by people who don't know anything about the magazine or the subject. They need to do some preparation themselves. I need to know why their event will be of interest to my magazine's readers. Advance warning is good but don't over do it. One organisation sent me an embargoed release so far in advance and so often that by the time the report was actually launched, I ceased to think of it as news and completely forgot to include it in that month's issue.'

Top tips for approaching journalists

- Always contact a named person. Let them know that you read/watch/listen to their work and like what they write/broadcast about (so do your research).
- If you want to contact more than one person on the same publication/show (news/features editor, producer/researcher), contact them separately as their needs are usually different, as are their timescales.
- Find out what type of stories they are looking for.
- Establish when their deadlines are for copy/press releases.
- Be aware of the publication/show's target audience.
- Email is the most productive way to contact journalists. When sending attachments (such as a press release) also cut and paste the information into the body of the email.
- When you have an idea, email a short outline with possible contacts and your contact details. **Always** follow up within two days with a telephone call.
- Invite them to your event/launch/open day or invite them to your office to discuss a highly topical theme/issue. They will only come if they will get an 'insight' and 'advance notice' of something 'new'. This is particularly useful with specialist magazines and local/regional newspapers.

Useful resource

Guardian Media Directory £19.99 from all good bookstores or from the Guardian directly

www.guardian.co.uk/books

DRAFTING THE PROGRAMME

The purpose of a programme is to:

- Let everyone know the purpose of your event
- Provide structure to your event
- Inform participants of what is happening and when
- Provide a guide to speakers and workshop leaders as to what else is happening on the day.

Therefore, it is essential that your programme contains the following:

- Details - venue, date and times
- Purpose/objective of the event
- What will be happening - who the speakers, entertainers, films etc are
- When there will be free time/breaks.

Consider the example of a programme for an AGM and a conference on the next pages.

(Name of Organisation) Inaugural Annual General Meeting

COMMUNITY CENTRE, (ADDRESS)

22 MAY 2006

Programme

- 9.30 m** **Arrival (tea and coffee available)**
- 10.00 am** **Welcome and opening remarks**
(Name), Chair of steering committee
- 10.15 am** **CBMEA constitution explained**
(Name/s)
- 10.45 am** **Voting process explained, and vote by members**
- 11.00 am** **Keynote Speech (Title)**
(Name of speaker)
- 11.30 am** **Questions**
- 12.00 noon** **Results of voting**
- 12.10 pm** **Questions**
(Chairperson)
- 12.30 pm** **Lunch**
- 1.30 pm** **Opening remarks**
(Name of speaker)
- 1.40 pm** **Entertainment**
(Name and details)
- 2.10 pm** **Keynote Speech (Title)**
(Name of speaker)
- 2.40 pm** **Questions**
(Chairperson)
- 3.00 pm** **Closing Remarks**
- 3.15 pm** **Network and close (tea, coffee and networking)**
(Contact details for organisation)

(Name of Organisation) (Name of conference)

COMMUNITY CENTRE, (ADDRESS)

22 MAY 2006

Programme

9.30 am Arrival (tea and coffee available)

10.00 am Welcome and opening remarks
(Name), Chair of day

10.15 am Keynote Speech (Title)
(Name), Chair of day

10.45 am Speech (Title)
(Name), Chair of day

11.00 am Questions

11.30 am Break

11.45 am Workshops

1.00 pm Lunch

2.00 pm Opening remarks
(Name), Chair of day

2.15 pm Panel (Title)
(Names of panel members)

2.45 pm Questions

3.00 pm Workshops

4.15 pm Closing Remarks

4.30 pm Evaluation Network and close
(Name), Chair of day

(Contact details for organisation)

GUIDELINES FOR CHOOSING A SPEAKER

Relevance

- Are they suitable for your participants, will they be able to identify with the speaker and the topic area?

Ability to communicate topic area

- Is the speaker knowledgeable about the topic?
- Does the speaker have a track record of working in this topic area?
- Do you require anecdotal evidence?

Ability to engage the audience

- Are they a good communicator?
- Can they talk to a variety of audiences?
- Do they use modern audio visual equipment?

Has spoken at something similar before

- Does the speaker have a track record of speaking at conferences and/or seminars?

References

- One of the event organisers has heard them speak before
- A reliable source has recommended them

Cost

- Funds are available to pay their fee
- Funds are available to pay their expenses

CHECKLIST FOR CHAIRPERSON, WORKSHOP LEADERS, OPENING AND CLOSING REMARKS

Role	Responsibility	What to look for	What to avoid	Brief required?
Chairperson	Keeping the event flowing to time	Time management skills, good communicator, concise, ability to summarise main points of speakers, ability to start and conclude debates, firm and fair	Talking about self, lack of clarity about role and topic areas, lack of understanding about equalities	Yes
Workshop leaders	To ensure that the workshop theme is effectively communicated and discussed by all present	Ability to provide short presentation on topic area, good communicator, concise, ability to start and conclude discussions, ability to record main points of discussion	Talking about self, lack of clarity about role and topic areas, lack of understanding about equalities	Yes
Opening and closing remarks	Ensure the organisers are thanked and importance of theme of the event and participants' role communicated, summarising the outcomes of the day	Someone who will have respect/be recognised by the participants, good communicator, concise	Disinterested local dignitary who lacks knowledge of the topic area or understanding of the participants needs	Yes

DEVELOPING AN EVENT BRIEF FOR SPEAKERS, WORKSHOP LEADERS, CHAIRPERSON, OPENING AND CLOSING REMARKS

A brief should contain the following information.

Purpose of event

- Provide details of the objectives of the event
- Provide details of the likely participants

When it will be held

- Date
- Time
- Venue

Clarity about topic area

- Topic area
- Length of time
- Audio visual
- Question and answers
- Summarising main points
- Recording main points
- Facilitative tools required for engagement

Clarity about expectations

- Equalities
- Health and safety
- Special needs
- Feedback
- Copy of speech, workshop content

Payment

- Fee
- Expenses

What they will need from you

- Equipment
- Administration
- Special needs

CONTINGENCY PLANNING CHECKLIST

Despite your best efforts, sometimes plans will need to be changed. Therefore it is important to have a back-up plan available just in case.

One way of achieving this is to have 'cut off' dates agreed in advance, after which time a contingency plan can be set in motion.

Activity area	Original plan (include event details in this column)	Date agreed (cut off date before contingency plan is set in motion)	Contingency plan (agreed action to be taken in response to situation)	Decision date (date that contingency plan will be set in motion)
Cancellation/ reschedule				
Finding an alternative venue				
Back up speakers				
Low take up				

Transport issues				
Catering				
Insurance				
Accidents and/or illness				
Weather consideration (storms/ lightning)				
Equipment support				
Equalities				

THE EVENT – CRISIS MANAGEMENT

However well you plan and however well you follow up on arrangements made, double check and double check there is always the chance that on the day of the event itself something could go wrong. Illness, childcare, technical hitches all can threaten to derail even the best-laid plans. The answer is not to worry about what could go wrong but to prepare for every eventuality. Have a Plan B.

Have a Plan B

Below are five of the most common 'on the day' crises with some suggested solutions. Remember the 'glass is half full, not half empty'.

SPEAKER CANCELS AT THE LAST MINUTE

'It happened to us on the day of the launch of an important research project. The keynote speaker, the person who carried out the research, phoned literally five minutes before registration to say that they were ill. It was a horrible moment but fortunately we had made sure that we had briefed a member of our management committee who was well known figure in the area of the key points in the research and she was able to deliver. Then a member of the research team led the Question and Answer session. We explained what had happened to the original speaker, apologised and moved on. Most people were there to hear about the research not necessarily the person who delivered it for their own sake. It worked out well.'

EXTERNAL DISRUPTION

'We were set to start our AGM at 9.30 am and had a full and packed agenda. Sadly there was a serious car accident a mile from the venue many people were delayed by up to an hour. Eventually by the time we got started we were almost an hour and three quarters over time. We had planned for this as our Chair had had a similar experience in the past had and advised us to have a second agenda to use as back up in case we had to shorten the event. By doing this we meant that were able to get the most important business done and agreed.'

CONFLICT AND DISRUPTION

'We knew that this was going to be a heated AGM as some people wanted to vote off certain management committee members and it was going to get quite personal. We did not want to stifle debate but at the same time we did not want the event disrupted and the majority of people being unable to contribute. We prepared fully to ensure the agenda was clearly timed, the Chair fully briefed and the rules of the Meeting - constitutional and Code of Conduct - clearly explained. By structuring it in such a way we were able to allow for debate and decision but not for disruption. In the main it worked.'

EQUIPMENT FAILURE

'Things can always go wrong, it is a fact of life we made sure that we attended early on the day and went through all the equipment to check it worked it did but we thought it would be well worth budgeting for a specialist to be on hand throughout the day in case anything went wrong. The venue we hired offered such a service and it worked out to be a great deal.'

TOO MANY PEOPLE

'Two weeks before our event the event was fully booked up. The venue held 120 people and those were the numbers we had booked to attend. However on the day lots of people turned up having failed to register. Some said they had but we hadn't responded to them, some said they had travelled a long way and could not afford the cost of not attending as a result. As much as we would have liked to accommodate everyone we couldn't for Health and Safety reasons and for the obvious reasons that it was not fair on those who had registered. All those in charge of registering on the day were clearly briefed and supported, ensuring that they did not get railroaded into letting people in however strenuously they argued and they did!!'

AFTER THE EVENT

COMMUNICATING SUCCESS AND POST EVENT REPORTING

Informing staff and stakeholders of your event's achievements as a result of your event planning and publicity plan, is constructive and worthwhile. Before that it is necessary for your event planning steering group to have a debrief to assess whether and how the event and its objectives were met.

There are many examples of good news not going beyond the first person to hear (or know) about it as the next funding application takes precedence.

In one case a local voluntary organisation won a prestigious award for innovation and attended a glamorous event. Somehow it slipped the organisation's mind to communicate that they had actually won and attended an event where they could have publicised themselves. It wasn't even put on their website.

Yet if the outcome was less than positive, it is more likely that it would have been communicated.

With success there will always be room for improvement, which is why your use of language is important - motivational not judgmental. Skills such as active listening, empathy and creating a rapport go a long way. That does not mean that you should overlook shortcomings in how you met your event plan and publicity objectives.

WAYS OF COMMUNICATING SUCCESS AND POST EVENT REPORTING

- Having a good news section in your newsletter and on your intranet and/or website
- Using a staff forum to share outcomes
- An email circular
- Feedback and ideas for next event box
- Building up a news or 'articles' cuttings portfolio held in staff communal areas and/or putting them in pigeonholes or on notice boards.
- Sending publicity material to potential and existing funders and partners
- Annual report
- Presentations
- Identifying key individuals to thank for their specific input
- Getting staff to feed into an action plan
- Schedule a PR/media follow up with journalists with which you have cultivated relationships based on ideas to come from the event and/or the impact of the event
- Use the publicity generated and the media relationships formed to publicise your organisation as a whole

CASE STUDY: WHERE GOOD PRACTICE EXISTS

Change Incorporated is a national support network for advocacy workers. They normally meet every two months to share good practice and find solutions to issues. Once a year they hold an annual three-day conference for members. The conference is normally organised in different regions across the country every year with representatives from each region taking responsibility for the every day planning. Conference theme and speakers are normally decided by the whole network to ensure that it meets the network's needs.

The regional representatives allocate the tasks among themselves and normally begin planning the conference within six weeks after the previous conference. Their first step is to read the feedback from the previous conference where participants not only comment on the event but also make suggestions for the next year's conference. These are collated into two sides of A4 with recommendations from the region and circulated to other representatives across the UK.

At the next national meeting, the representatives agree a theme; date and budget for the event based on last year's account plus an inflationary increase, allocate tasks and set a reporting back timescale.

All network representatives, whether they attend the support meetings or not, receive minutes that inform them of the event so that they are able to put it in their diaries.

At each subsequent national meeting a slot is allocated for feedback on the conference and the agreed actions. Any issues that arise are dealt with by the group in order to share the workload and to support the regional representatives.

Regional representatives meet up and allocate the local tasks between them for choosing venues, caterers, preparing the publicity and collecting fees from representatives that want to attend.

Other Change Incorporated representatives help to find speakers and workshop leaders and liaise with the regional organisers and write letters on their behalf. Representatives from across the country volunteer to help out at the event all taking on small tasks and sharing in the organisation.

WHAT GOOD PRACTICE EXISTS HERE?

The purpose of the event

- All those attending the event know its purpose and are aware of the theme
- The feedback from the previous event allows for correcting the things that did not go right last time

The timescale

- At least 10 months is allocated to organising the event so that time is allowed for all the necessary tasks to be carried out. The timescale also allows for when things go wrong that there is plenty of time to put it right.
- The timescale enables those involved to carry out other work as well as organising a conference.

Allocating resources

- The numerous tasks that are required in organising an event were split between several people,

both at a local and national level. This enabled all those involved the space to 'do their bit well' without feeling overwhelmed by the whole thing, as well as carry out other work.

Planning and feedback

- The initial planning of the event by all involved and the importance of feeding back progress on a regular basis ensured that everyone was clear about both the purpose and theme of the event, so clear messages were sent out to everyone they needed to involve.
- The feedback ensured that the planning of the conference was on track and any issues could be picked up and resolved through contingency planning along the way.

Attendance at the event

- Agreeing the date of the event at least nine months in advance and discussing it with those involved, ensured the choice of venue, that it did not clash with other events and that members could allocate the date.
- This increased the chances of more people being able to attend the event in a suitable venue.

EXERCISE: ORGANISING THE ANNUAL REVIEW

Each year Star Centre Plus a community development agency organises an annual review. This review looks back on the work of the organisation in the previous year as set out in the two-yearly business plan and to set the agenda for the next year.

Everyone involved in the organisation is invited to attend including service users who are normally invited to attend for part of the day to feed their views into the process. It is a compulsory day and every effort should be made to ensure attendance by staff and volunteers.



Based on the good practice guidelines provided set out the action plan for ensuring that this review day is a success.

AN ORGANISATION'S STRUCTURE

A key component of planning an event is ensuring that it fits in with the organisation's overall purpose.

The diagram below outlines the key considerations that need to be taken into account.

Mission - Vision - Values



Strategic Plan



Business Plan



Work Programme



Action Plans

ROLE OF MISSION, VISION AND VALUES IN EVENTS

- Have you ever attended an event where you have wondered why it was being held?
- Have you ever left an event and tried to explain its context and been unable to?
- The role that Mission, vision and values is to provide clarity of purpose to the event.

QUESTIONS TO ASK

- Does the context of the event fit in with our mission?
- How will the event help us achieve our vision?
- Will the content of the event be compatible with our values?

The answer to all three should be clear, if they are not you will need to rethink.

MANAGING CONFLICT

Anyone who has ever organised any type of event will know that the potential for conflict is great! At every step of the planning and organising, an event steps need to be taken to ensure that conflict is kept to a minimum.

These steps can be collated under the following headings:

CLARITY

- Purpose - reasons for holding event
- Roles and responsibilities - of organisers and participants
- Ownership - whose event is it?

VENUE

- Accessibility - opening and closing times, location, cost, disability, maximum numbers, animals
- Quality - value for money, noise, hygiene, facilities
- Catering -in-house or external, dietary needs, seasonal, cost

FUNDING

- Internal or external
- Budget - venue, catering, speakers, transport, childcare, publicity, administration, contingency

CONTENT

- Speaker and workshop topics
- Timings
- Number of participants
- Variety of participants
- Visual aids
- Seating
- Materials

DEALING WITH CONFLICT

Conflict is all around us: in our homes, in the street, at work, it is reported in the media and is the subject of dramas; it occurs between individuals, groups or countries. Conflict is normal, and is a prevalent condition in our society.

All conflict stems from differences.

- **Different perspectives** - on life, on values, on choices and preferences
- **Different human dynamics** - individual sense of identity that is based on our perceptions and experience from life

In any group or team or family there will be differences.

Conflict arises when differences are not recognised or are badly handled.

IN THE CONTEXT OF AN EVENT

In the planning stage

- Agree ground rules for working together and agree ways in which conflict - if it arises - will be dealt with
- Agree who makes the decisions, has the final say
Is this an organisation, group or individual plan?
- Agree roles and responsibilities of all organisers
Clearly define tasks and expectations of those carrying out tasks
- Agree realistic timescales for achieving tasks
- Agree reporting back process, be it through meetings, or email, telephone, reports
To reduce conflict, make sure everyone involved receives all the information, this helps to prevent misunderstanding
- Agree the budget and its possible source
This will make all other tasks easier and provide the right boundaries
- Agree the theme of the event and its purpose
Make sure that everyone involved is clear why they are doing what they are doing
- Agree who can attend and who cannot
This is always linked to the purpose of the event
- Agree a contingency plan where tasks do not go the way they are supposed to
This should include abandoning the event if it is not feasible

At the event

Are the organisers and the participants clear about what is happening?

For organisers

- Agree how you will brief each other before and during the event
- Arrive early and stay calm
- Agree roles and responsibilities for the different tasks that will need to be carried out to ensure the smooth running of the event

For participants

- A 'meet and greet' system is always best
- Always remember that participants will need regular reminders throughout the event so someone will need to be on hand to provide it
- Make sure the organisers are clearly identifiable
- Provide an easily accessible programme of the event's timings and verbal reminders at regular intervals

Ground rules

- Let participants know in advance the 'Do's and Don'ts'
- Remind participants verbally in an easily accessible format of the 'Do's and Don'ts' during the event
- If conflict does happen, deal with it as quickly, efficiently and as quietly as possible. Stick to the ground rules set out prior to the event. This will ensure that it doesn't spread!

Feedback on the event

- Invite all participants to feedback on the event, particularly if they have an issue of concern
- Cover the areas in the feedback where you could see possible conflict
- See all feedback as part of the learning process
- Some feedback will be negative and may appear unjust
- Where there is a lack of clarity about the feedback given, ask for an explanation. This will, of course, need to be conducted in controlled manner in order to prevent additional conflict
- Consider the audience when you decide the type of feedback you ask for. Some participants will require feedback in more easily accessible form than others

Receiving feedback

Verbally

- Feedback can be provided during the event after each section
- During a question time at the event
- At the end of the event

In writing

- Feedback forms are often a cause of conflict

- Therefore feedback forms should be short and concise. More than two sides of A4 are unlikely to be completed
- The less writing the participants have to do the better, therefore only ask for comments where it is needed. Tick box or score, eg 0-5, the remainder
- Pens and support should be available to increase the likelihood of completion

Visual aids

- For events where technology is used, feedback can be requested via video or telephone recording. This will enable participants to express their views on the event in the way that they see fit

Whatever format you choose to use, always remember to thank participants for their views.