Lancaster University

Event planning toolkit

A staff guide to planning and managing an event

Ceremonies and Events
Alumni, Development and Events
C Floor, University House

events@lancaster.ac.uk

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Introduction

This toolkit aims to provide you with advice and guidance if you are planning a relatively small event (eg, up to around 250 people, as a guide) such as a small conference, dinner, public lecture, business networking or student-focused event.

It walks you through the factors that you will need to consider, from planning to execution and evaluation.

Read through this guide and use the **Event Planning Template** to record the details of how the points are applicable to your own event. This toolkit has been produced to apply to a broad range events, so you may find that not all sections are relevant to yours.

If you are planning a larger event, for example an Extrav, this toolkit may give you some broad tips but you should look to engage with professionals at the University as soon as you have an outline of your event – see section on University services: useful contacts.

Preparing for success

Event Objectives

Every event should start off with a set of clear objectives. If it's not clear what you want to achieve from the event, it's worth asking why you are holding it!

Clear objectives will also help you to plan an event which is properly targeted at the intended audience.

Ask yourself (or your line manager/ the project lead):

- Why are you holding this event?
- What are the outcomes you expect to achieve from the event?

For example, is the purpose of your event to:

- Communicate a key message?
- Raise the profile and reputation within a key market?
- Launch a new facility or service?
- Drive student recruitment?
- Network with peer groups?
- Engage with the general public?
- Celebrate an achievement, milestone or anniversary?

Key Messages

Key messages are the main nuggets of information that you want your attendees to take from your event.

Key messages should be short, sharp and easy to understand. To plan your key messages, think about what you want to say to your target audience and what you want them to think, feel and do as a result of the event.

These key messages should become a clear and consistent thread throughout your event themes, topics of discussion and in your marketing and promotional materials.

Target Audience

Identifying your intended audience will determine the format and style of your event, together with how formal or informal the event should be.

Think carefully about whose thoughts, feelings or actions do you want to change and what the value of the attendees are to you and the aim you are trying to achieve.

Event format

The format you choose should be centred around the objectives, what you want to achieve from the event and who you want to attend.

Consider:

- Do you want to gain insight from the audience, or just impart information to them?
- If the former, how do you want to do this? Through simple questions, or gain more detailed feedback through workshops?
- What is the subject matter? Might it cause debate and controversy and if so, how will you manage or even incorporate that into the event?
- If you have several speakers, could you use a panel format rather than back-to-back presentations?
- What time of day is it? Will your guests expect food?
- When and how long will you need to provide breaks for the speaker and audience?
- Do you have space and staff to split your audience into breakout rooms?

Date and Time

In order to attract a good turnout of attendees, it is important to give careful consideration in setting the right date and time for your event.

Consider:

- Consulting with senior University hosts to check diary availability on proposed dates
- Checking diary availability with proposed speaker(s) well in advance of the event
- How your event might be affected by school holidays, exam periods, open days, and other major internal and external events
- If a public audience, will your event start time allow a reasonable window of travel time to arrive at the event after normal working hours finish?
- The most suitable day of the week when attracting a business audience i.e. avoid Fridays and Mondays and schedule over a lunch period or early evening
- Allow for at least a three month lead time

Risk Assessment

By carrying out a risk assessment at the early stages of your event, and revisiting and sharing this regularly within your team, you can preempt and prevent many risks which may arise through your event.

A risk assessment will allow you to consider and identify potential risks associated with the entire event (both before and on the day), evaluate them and put strategies in place to minimise the risks.

For example, risks that may be associated with an event are:

- Low ticket sales/registrations as a result do not cover the costs of the event
- Health and safety risks associated with outdoor and/or public events
- A security threat associated with a high profile speaker such as a political figure, or controversial subject matter i.e. public demonstration

A simple **risk assessment form** is available on the Health and Safety office webpage.

For further advice about health and safety at University events, contact the Health and Safety office.

If you are using an off-campus event, ask your venue about their risk assessment arrangements and ensure that you abide by them.

Budget

Hosting an event can be expensive and without careful planning, costs can spiral out of control.

Setting a budget in the early stages of planning an event is important to ensure that all foreseeable costs are covered. When setting a budget you must consider the following:

- Has the budget source been identified?
- Has the breakeven point been established (if a fee paying event)?
- Have you accounted for VAT?
- Who and where will you record expected and actual costs?

Use the **budget planning template** to plan your budget and stay on track throughout.

Evaluation and outputs

Evaluating an event is an often overlooked but essential element of the planning and execution process. It is not something that should be left to the end of your event: you need to think early on about what information you need to gather from your attendees in order to evaluate your event and incorporate this into your planning.

Consider:

- What kind of information do you want to collate about your attendee demographic and how will you do this?
- Will you issue a post-event survey, and if so, will this be on paper or online?
- If and how will you monitor the effectiveness of the event, eg, has people's behaviour changed as a result, have people requested further information on your subject etc?
- How will you report back to stakeholders, eg your Head of Department, a steering group, funding organisation etc. and what will you need to include in your feedback?

For further guidance, see the **Event evaluation template.**

You also need to think about the outputs you want to gain from your event. Film and photography, for example can be a useful record of your event and provide a longer life span after the event itself is finished.

However, do be realistic about whether your investment, particularly in filming which can be expensive, is worth it for the audience you will ultimately expect.

Organising a Venue

Your venue can say a lot about the type of event you are holding – helping to project an atmosphere.

On campus

If you are holding an event on campus the Room Capacity and Equipment List can help you to identify the most suitable location both in terms of size of venue and facilities.

To book rooms on campus use the online room booking system.

To gain access to on campus venues after working hours you will need to request this.

ISS can provide access to venues which require swipe card access or which have electronic doors – contact the ISS helpdesk at iss@lancaster.ac.uk or call (01524 5)10987.

You will also need to contact Porters as they service the building and will need to be informed if you plan to be in there after hours and when you will leave.

Contact Sandra Fletcher in Security on (01524 5)92179 or s.fletcher@lancaster.ac.uk regarding portering.

Off campus

The Ceremonies and Events team has experience of using a range of off Campus venues and can offer you advice on possible venues, or what to look for in off campus venues.

Wherever your event, consider:

Event layout

- Will you create a welcome area for guests to linger before they are invited to enter the main venue (eg, if your speaker is getting ready)?
- Do you need a green room for speakers, VIPs or performers to get ready beforehand?
- Do you require additional rooms close by for break out rooms, or a pre or post event reception?
- Is there space for a registration desk as guests arrive?
- Where will guests put their coats?
- Are there bathroom facilities in close proximity?
- Might there be other noisy events or activities being held in the same venue at the same time? Ask the venue manager.

Capacity

- Can the venue comfortably accommodate your target number of guests?
- Does the venue allow you to grow your event should your audience exceed your target number of guests?
- Equally if your event is more intimate, do not opt for a larger venue which may make the event look empty

Access

- Is the venue easily accessible to your guests and well sign posted or will additional signage or staff to direct guests be required?
- Are there lifts and/or special access for guests with disabilities?
- Can external suppliers easily access the venue?
- Might there be road works or building works which make your venue hard to find, or get to?

Resources

- How will you dress your venue?
- Do you need any extra furniture not already in the room?
- Do you require a lectern, or table for your speakers?
- Are there built-in audio visual facilities such as a PA system, data projection and screen?
- Banners are available to help you simultaneously promote the University and dress your venue. To book a banner, contact Sue Clough at events@lancaster.ac.uk
- Will you require any holding slides on the screen whilst people are taking their seats? You can download a University presentation slide template online.

Budget

- Do you have budget allocated for venue hire should there be a fee associated with the venue?
- Don't forget that often, items such as table cloths and AV support incur additional costs

Catering

Consider if you need to (and have the budget to) provide catering at your event. This could range from a full sit down meal, to providing tea and coffee on arrival.

Consider:

- How many people you expect?
- What time of day your event is held at?
- Do you need to know dietary requirements and if so, will you request these on registration?
- Does your menu include vegetarian options and non-alcoholic drinks?
- Will you serve refreshments before, after or during your event?
- What is your budget for catering?
- Is hot or cold food required?
- Is the caterer required to provide menus, place cards, linen and table numbers?
- Is power required for the caterer? Where will they prepare food?

Don't forget to provide the caterer with final numbers and dietary requirements before the event.

For further information about catering services at the University, contact cateringbookings@lancaster.ac.uk or call (01524 5)93260.

Security and parking

Security should be alerted to any major events on campus.

You should also alert security if your event covers a controversial subject matter so that security cover can be brought in if a protest is possible. The team can also advise of whether you should look to book external security cover for off campus events which may cause controversy.

If you are organising a term-time weekday event on campus, and expect more than 50 vehicles to attend, contact Doug Shaw, Security Operations Manager, so that Security can record your event in their diary and provide any necessary advice on car parking arrangements.

Audio Visual and lighting and music

Ensuring that your audience can clearly see and hear your speakers (if any) and that the atmosphere is right is a fundamental part of your event.

Consider:

- Are there built in audio visual facilities such as a PA system, data projection and screen?
- Do you require any additional equipment in the room such as additional screens?
- Will you require guest access to Wifi or IT facilities in the venue?
- Is your event being filmed? If so, you will need each speaker to wear a microphone, even if they can be heard clearly by the audience. Please note that filming is not a service offered by internal services at the University currently
- Can the venue, if not integrated, accommodate a portable PA system such as free standing speakers and a data projection and free standing screen?
- Is there a clear line of sight for all guests or do you require additional projection facilities?
- Are there different lighting options available in the room, or will you have to look at providing a middle ground between bright glare and darkness? If the event is being filmed you will need it ensure it is bright enough for the cameras
- Who will manage the lights if the lighting needs to change during the event, eg, during the showing of film clips?
- Will you have a question and answer session from the audience? If so, it is likely that roving mics will be needed. You will also need a mic runner.
- Will you use music to create atmosphere at any point during the event? If so, which, and do you have a sufficiently good sound system?

If you are opting to use music, consider whether this should be a recording or live performance. The latter can add an impressive touch, but make sure you have the space available and whether they will require amplification.

For more information about services provided by ISS to support your event contact the ISS Service Desk on iss@lancaster.ac.uk or call (01524 5)10987.

For more information about services provided at the University, see the University services: Useful contacts section.

Resources to support your event

Events planning

In order to support your event planning, a suite of templates have been produced by the Ceremonies and Events team. Many of these are signposted throughout this document. They include:

- Event planning template
- Event planning Gantt Chart template
- Event planning Gantt Chart example
- Budget planning template
- Risk assessment form
- Public lectures planning checklist
- Speaker briefing template
- Press release template
- Event evaluation Template

Each of the templates are available for you to download from the Events Toolkit page on the staff pages of the University website.

Room dressing

There are some resources available centrally which can help you dress your venue:

- Banners are available to help you simultaneously promote the University and dress your venue. The book a banner, contact Sue Clough at events@lancaster.ac.uk
- Will you require any holding slides on the screen whilst people are taking their seats? You can download a University presentation slide template online.

When producing any other information, handouts or set dressing, see the Communications Toolkit to ensure that the colour and branding is consistent.

Lancaster Conferences

You may wish to enlist the services of Lancaster Conferences (formerly the Conference Centre) in planning and delivering your event.

The professional team can offer:

- Purpose-built meeting and training rooms at Lancaster Conferences, located to the rear of Lancaster House hotel
- Meeting space in County facilities including the Private Dining Room and the Faculty of Arts and Social Sciences all year round for up to 150 delegates
- Campus venues such as LUMS, George Fox, Charles Carter, LICA and others during the vacations
- Discounts on rates for internal staff meetings and delegate rates for external clients
- Preferable rates for guest accommodation
- Help with bids, budgets, delegate registrations and presentations

The team can support you in deciding upon and booking catering, room layout and booking venues and overnight accommodation.

Please note there is a charge for services from Lancaster Conferences.

For all enquiries and further information please contact conferenceoffice@lancaster.ac.uk, call 01524 592444, or go to www.lancaster.ac.uk/conferences.

University Host

A University host is often an important element of your event. Your host could be a senior person from your department, faculty, or the University as a whole. Their role might be to open the event, welcome speakers and provide overview and context during a brief welcome to your guests.

When securing a University host you should provide the following information:

- Details of the proposed date, time and location of the event
- A short brief on the event and proposed running order
- In the brief also include any key messages which you wish to convey to attendees
- Advise on the their role and duration of the commitment required
- You may also wish to advise of any nearby parking and whether refreshments will be provided
- Who their contact on arrival will be

Advanced notice of around three to six months is advised when scheduling time in senior officers' diaries.

Speakers

Inviting one or more speakers to your event can help give your event a central theme and focal point. The profile of your speaker can also be an important factor in drawing in guests.

Your guest speaker may be a University academic or an external contact.

Consider the following when booking a speaker:

- Approach speakers in good time, ideally at least six months in advance. Some high profile speakers may require notice of up to two years
- Develop a well-researched list of target speakers and approach in priority order
- Provide your speaker with a full brief on the event, a rough guide as to their presentation topic/theme and generally what is required of them
- Clarify whether a formal invitation to speak should be sent from a senior officer at the University
- Always provisionally hold suitable dates in the diary of the speaker
- Confirm if there is a fee and/or expenses associated with the speaking commitment
- Obtain a biography and photograph (if necessary) of the speaker for any promotional material
- Agree on any media related activities with the speaker and in conjunction with the press office
- If the presentation is being filmed/recorded ensure that the speaker is aware of and happy with this
- Allocate a representative to greet and look after the speaker
- Issue a briefing document to the speaker at least one week prior to the event outlining the running order, directions and parking, meet and greet details, access, details of VIP attendees, dress code etc. See the **speaker briefing template** for guidance
- Ask for the speaker's presentation in advance so that you can check it works
- Check if they wish to use any particular demonstration materials or technology as part of their presentation
- On arrival walk the speaker through the proceedings, including where you would like them to stand / sit etc
- Allow time in the set up plans to put a lapel mic on them if necessary
- Provide water for the speaker on stage

Remember to always follow up with a thank you letter/email to the speaker whether it is from yourself, the University host or department.

Insurance

If you book an external venue, you may be required to present the University's Public Liability Insurance.

If you are bringing in certain suppliers to campus you may also need to ask for a copy of their own Public Liability Insurance Certificate.

Contact insurance@lancaster.ac.uk for a copy of the University's Public Liability certificate and advice on any other insurance queries.

Communicating your event

Whatever the format of your event, it won't be a success without attendees – and importantly, the right attendees.

Producing promotional materials

Whether you choose to promote your event via formal named invitations, promotional flyers or online e-shots, the materials should…

- Be appropriate to the audience you are aiming to attract
- Convey key messages about your event
- Cover the fundamentals – when, where, and why
- Use the University brand and logo appropriately
- Be clear about whether and how registration / RSVP is necessary

Think about also including the following:

- Request for dietary requirements
- Whether the event is open to all, or only the recipient of the communication? Can they bring a guest?
- A map
- Details of car parking (where and how much) and /or nearby public transport
- Details of the speakers if applicable
- Any additional advanced reading material

If you are sending out online communications to a mailing list you have, you will need to take steps to ensure you don't fall foul of the Data Protection Act:

- Make sure the people on your list gave permission to be contacted for this purpose
- Work to maintain accurate and up to date data
- Remove people from the list if and when the ask to be – it is good manners to offer contact details for those who wish to unsubscribe
- Store this information securely and don't pass it on to other organisations or teams for use for different purposes

For detailed information about using the University brand for publicity materials see the Communications Toolkit, produced by the Marketing and Communications team.

Promoting your event

Once you have carefully identified your target audience, it is important to target them effectively in order to ensure maximum attendance.

Please note, if your event is invite only, it is best to avoid pre-event publicity and focus instead on sharing the success of your event after it has taken place.

To an invited audience

For events that are entirely, or part, invite-only, consider…

- Whether you have up to date contact details and if not, whether you are able to check these. Out of date contact lists can cause problems or even offence if invitations do not reach their intended recipients
- Whether post or email is appropriate for your audience. Don't forget that there are some people who do not use email so you may need to incorporate postal invites into your plans in any case
- Who the invitation will be sent on behalf of
- What the RSVP process will be and who will handle these
- What the deadline for RSVPs is

To the public

If you are happy for members of the public to attend or get involved in your event or activity, there are a number of ways in which you can promote it to this audience:

The Media

If you feel that your event is particularly newsworthy at a national level – for example covers a new or controversial subject matter, or has attracted a high profile speaker, the press office may be able to help you. Contact the press office for guidance at pressoffice@lancaster.ac.uk

If your event is lower key but perhaps suitable for a local audience, use the **press release template** to draft a media item about your event. Please then send this to the press office using the email address above.

Media coverage is never guaranteed, so make sure your event is promoted in other ways to maximise attendance.

Social media

The University has a number of central social media channels which are maintained by the Digital Engagement Team. These include the following accounts:

- Facebook - www.facebook.com/LancasterUniversity
- Twitter - @LancasterUni
- You Tube - www.youtube.com/LancasterUniversity
- Sina Weibo (China): www.weibo.com/LancasterUni

If your event is open to the public and you would like to promote it via social media, contact the Digital Engagement Team at digital.marketing@lancaster.ac.uk

There are also a number of accounts aimed specifically at Alumni which are managed by the Alumni and Development office (see below).

Social media updates can be scheduled to take place before, during and after your event as necessary.

To Alumni

The Alumni and Development Office leads communication with Alumni from across the University. They have a number of communications channels including Alumni website pages, Facebook and LinkedIn profiles, and the Steps magazine.

If your event or activity is open to Alumni to attend, please get in touch with Jane Silvester (j.silvester@lancaster.ac.uk) Alumni & Friends Engagement Manager, to discuss how you might be able to promote your event to this audience.

To Staff

There are a range of centrally managed internal communications channels at the University to get messages out to all staff. These include:

- LU Text – A weekly email to all staff who have email access, which provides news and timely updates
- Plasma screens – Events and information shown in key locations across campus
- Social media channels such as Lancaster Campus Life on Facebook which is run by Facilities
- The Word, a quarterly publication which goes to facilities staff without access to email. If you would like to discuss more details about how to promote your event to staff without work email access, please contact Louisa Duff, Facilities Communications Manager – l.duff@lancaster.ac.uk

There may also be internal communications channels within your own faculty which you may be able to use to inform colleagues about your event. Please contact the relevant person in your department directly.

To promote your information via central internal communications channels, contact internalcomms@lancaster.ac.uk.

To Students

There are a number of channels which allow you to communicate information about your event or activity to students.

LUSU produces a weekly digital newsletter, Squeak. If you would like to submit an article for consideration to be publicised via Squeak, send your text through to help@lusu.co.uk.

If you would like your event to be uploaded to the LUSU online calendar, which automatically links to the calendar on the iLancaster app, please send details of your event through to LUSU at help@lusu.co.uk. If you have several or regular events to upload they can offer you access to do so yourself.

LUSU can also put you in touch with particular clubs and societies that might be relevant to your event.

If you feel your event has broad appeal to students, please contact Adam Bardsley, LUSU Head of Communications and IT for advice on how it might be suitable to communicate it to students.

Student Services has a student-wide newsletter – Student Services News - that is delivered digitally to all students twice a term – once at the start and once at the halfway stage. Contact Communications Manager Luke Davis on l.davis@lancaster.ac.uk if you would like your content to be included.

Showcasing the success of your event / activity

It's important to consider ways to capture the success of your event on the day, for example by taking photos and organising filming if appropriate and affordable.

Photos, and film clips if you have them, can prove useful for publicising the success of your event afterward and extend the life span of the event and its audience after the day itself.

Post-event information will can provide ideal social media content. Contact the Digital Marketing Team about post-event promotion: send your images and film clips through to digital.marketing@lancaster.ac.uk.

On the day

The day of the event has finally arrived and you are setting up the venue. There are some things that can be quite easily overlooked but are again important to the smooth running of the event:

- Final registration numbers: A final list of attendees for all aspects of your event should be printed and copies taken to the event for the registration desk and on site staff
- Event briefing update: If there are any changes to the final Event Briefing Note these should be communicated to the required suppliers and staff at the start of set up i.e. changes in catering numbers, line up of speakers
- Directional signage: Prepare, print and, if necessary, laminate directional event signage to be put up in and around the venue for attending guests, speakers and suppliers (this includes to lifts and WC facilities)
- Reserved seating: Print and layout reserve seating signs for VIP guests, speakers and guests with disability requirements
- Venue manager: Check who the venue manager is (if there is one) and ensure your staff know how to contact them should issues arise
- Venue check: Take time to walk around the venue(s) to check layout, cleanliness, that fire exits aren't blocked and that required equipment is on site. Check with the venue manager that no fire alarms are planned during the event and what to do in case of an alarm
- Technical run through: Make sure that audio visuals and PA system is working properly and that any speaker presentations are uploaded and running properly
- Staff: Ensure that all assisting staff are well briefed on their responsibilities during the event, familiar with the venue and have a copy of the running schedule to hand throughout
- Registration desk: Ensure that the registration is set up well in advance of guest arrival. Name badges if applicable should be visible to guests and sorted by surname. This will be guests' first point of contact at the event and warm welcome should be offered

- Branding: Ensure that all display stands with corporate branding are positioned in key locations with maximum exposure to guests and attending media without detracting from the speaker and event
- Stationery box: Pack a full box of stationery that you just may require on the day. This may include blue tac, extra signage, pens, paper, cellotape, extra copies of the program, extra bottles of water for speakers and a list of supplier and speaker contact numbers

It is also important to walk your speaker and host through the event and set up, checking that they are familiar with the running order, their cues to speak, where to stand, the technology being used, etc.

University Services: Useful contacts

The University services play a vital role in ensuring that your event runs smoothly. It is important to engage with the necessary University services as early as possible to provide them ample time to schedule and manage resources to deliver the best possible service.

AV/ ISS	ISS Helpdesk iss@lancaster.ac.uk (01524 5)10987
Catering The catering team can provide options and quotes for refreshments at your event.	Catering enquiries cateringbookings@lancaster.ac.uk (01524 5)93260
Cleaning Additional cleaning for specialist events can be organised if necessary. Please note a recharge may be applicable for this service.	Book additional cleaning via the Facilities Planon Helpdesk
Health and Safety For advice on managing risk at your event, contact the Health and Safety office.	Angie Park- Head of Safety , Health and Wellbeing a.l.park@lancaster.ac.uk (01524 5)10639
Lancaster Conferences	Lancaster Conferences enquiries www.lancaster.ac.uk/conferences (01524 5)92444 conferenceoffice@lancaster.ac.uk
Heating If your event is outside normal University working hours and you require heating in your room, you must contact facilities to organise this.	Book via the Planon help desk or contact Trevor Renninson t.renninson@lancaster.ac.uk
Marketing and communications Marketing and Communications can offer advice on using the University brand and logo appropriately.	Marketing Team marketing-services@lancaster.ac.uk

The press office can also guide you as to if and how to promote your event to the media.	Press office pressoffice@lancaster.ac.uk
Portering	Sandra Fletcher s.fletcher@lancaster.ac.uk (01524 5)92179
Security and parking Advice about gaining security for controversial events, and parking on campus	Doug Shaw, Security Operations Manager d.shaw3@lancaster.ac.uk (01524 5)94086

What next? Event planner

Now that this document has given you an overview of the types of issue you should be considering for your event, use the **Event Planning Template** to plan how you will address this for your own event.

When you have completed this document, share it with members of your team, including management. This will mean that you can ensure your team and management have a united view of how the event should run, and if not, can address early on any differences in ideas for the event.

For more toolkits and templates to help you plan your event, go to the **Events Toolkit** page on the University website.

Further information

For further advice and guidance on planning and delivering events, please contact:

Ceremonies and Events Office, Alumni, Development and Events, C Floor, University House
Lancaster University
(01524 5)92190
events@lancaster.ac.uk