

# Event Planning at the Curry School of Education

## **Guidelines, Best Practices, and Resources**



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### Meeting Room Reservations

Please review the website found at:

<http://curry.virginia.edu/gateway/faculty-staff/conference-space>

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## Introduction

The missions of Curry departments and centers are sometimes executed by hosting special lectures, meetings, celebrations, and conferences. Planning and implementing successful events is crucial to the business of Curry, and contributes significantly to our advancement and image. The vision, new ideas, and impact of event activities serve as change agents that stimulate growth, increase our effectiveness, and better meet the needs of our audiences.

Included in this document is a brief outline of crucial steps and best practices for the implementation of successful events. Following these steps provides guidance and resources that will help you make your event successful.

*THE MOST SUCCESSFUL EVENT IS THE ONE THAT  
ACHIEVES YOUR GOALS  
AND  
EXCEEDS YOUR EXPECTATIONS*

**Feel free to contact us if you have questions or need additional information!**

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## **The Critical Basics of Event Planning**

When planning any event, there are a few critical steps that are essential for success. Follow these steps, and you will be well on your way!

**Establish an effective planning team**

**Determine the event's purpose and objectives AND constantly refer back to them**

**Develop a realistic budget and use it as your guide**

**Select the date and venue carefully and early**

**Invite impactful speakers**

**Develop an agenda that encourages interaction and is consistent with your goals**

**Consider the audience carefully, and assertively market the program to your audience**

**Implement evaluation techniques – even if you won't be doing this event again**

## Establish the Planning Team

Timeline - 6 months before the event, depending on the event



It is critical to determine who the stakeholders are for your conference or meeting, and include them in your planning team.

Your team may include:

Staff, Faculty, Students

Department Leadership

Members of the Community

Board Members

Members of Professional Organizations

Alumni

***As a general rule, limit your planning team to less than 10 people***

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**Also consider the following when forming your team:**

- Diversity - Are representatives from diverse backgrounds and perspectives included?
- Meeting times/types of meetings/communication mode - How will you meet (in person, by phone, or through teleconferencing)? How often will you meet?
- Who has subject matter expertise? Who is good with details/has organizational skills? Who knows excellent speakers/has connections? Who has the historical knowledge you need?



Use Microsoft Outlook Meeting Request, Doodle, or Google Docs to determine when team members are available to meet.

***What/who else is important to influence your decisions and planning?***

# 1. Purpose and Objectives

Timeline - 6 months or more before the event, depending on the event

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*The one thing all amazing events have in common:*

## **A Clear Sense of Purpose**

What do you hope to accomplish and how can you succeed?

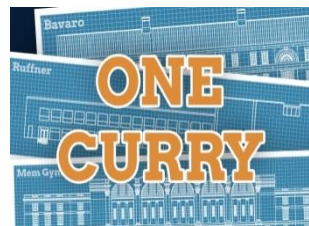
How does this event/meeting contribute to the work of the Curry School?

### **Discuss in the team meeting:**

Why is this event being held?

What are the benefits of attending?

Who is your audience?



Is there new knowledge that needs to be shared? If so, how will you make it applicable to your audience? Should it be translated into practice? If so, how will that be achieved and/or measured?

If it's a celebration, how will you make it memorable?

Have you assessed your attendees to help determine your goals and process?

How will you know when/if your goals are accomplished?

What is your plan for the evaluation process?



Consider writing SMART goals and objectives. SMART goals are Specific, Measurable, Attainable, Relevant, and Time-Bound.

For example: Participants will be able to list 3 evidence-based strategies that reduce bullying in schools.

*Even better (if you have a way of measuring):*

Participants will be able to implement 3 evidence-based strategies for reducing middle-school bullying within the first 6 months of the academic year.

## 2. Budget

Timeline - as soon as possible once the goals are established and venue is being considered

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To start planning the budget, write down everything you will need. Use the list of items below to trigger your thoughts, and write down a preliminary budget using the sample provided in the resource section of this document.

### Items to consider:

Catering (include flowers, linens, etc)  
Speakers (honorarium, travel, hotel)  
Venue charges  
Hotel  
Audiovisual support  
Supplies, printing  
Parking, transportation  
Marketing



*A thief broke into my house last night... he started searching for money, so I woke up and searched with him.*

-I Joke Memes

### Be sure to consider all details – small things can add up in the end!

**Parking Permits** – will attendees need to park in the garage or other parking area that requires payment?

**Transportation** – will you need a shuttle from the hotel or transportation to/from the airport?

**Extra food/special requests** – will you need to purchase extra food for snacks, breaks, water, coffee, etc?

**Conference Calling** – conference calling is \$.10/minute for folks who want to call into the program. For more information on conferencing, contact the Event Manager at [curryevents@virginia.edu](mailto:curryevents@virginia.edu).

**Color Copies** - per page, \$.60 for color verses \$.06 for black and white

**Additional A/V needed** – do you need to pay for additional a/v equipment and/or support?

**Guest reimbursements for travel** – this can be variable and is subject to surprises

**Extra shipping charges for deliveries** – does a shipment need to be delivered to a room?

**Changes in schedules** – will you have to pay for the hotel room if there is a last minute change in a speaker's schedule?

**Catering** – table/chair/linen rentals, on-site service, waste collection and removal

**Tent charges** – estimates for tents can vary widely and require additional approvals if erected on Grounds. See <http://uvapolicy.virginia.edu/policy/SEC-013> for more information.

**Consider State/Local Funding and how this applies to expenditures. There may be important restrictions when planning event details.**

### 3. Date, Venue

Timeline – as you develop your budget (both can significantly affect your budget)



What is the best time of year/day of week/time of day to hold your meeting/event?

What type of venue and room set up best suits your goals, audience, and process?



What venue and date best accommodates your audience (size, location, parking, etc)

Does the venue need to be close to restaurants, shopping, hotel, etc?

Do you want to hold this event when other Charlottesville events are taking place (football games, festivals, etc)?

#### Venue Options at UVa

Meeting spaces in the Curry School

Classrooms – reserve through The Source

<http://www.virginia.edu/source/>

Meeting Rooms – reserve through Outlook



Meeting spaces on UVa Grounds

Alumni Hall (434-243-2665)

<http://alumni.virginia.edu/about/alumni-hall-reservations/>

Zehmer Hall (434-982-5282)

<http://www.scps.virginia.edu/auxiliary/zehmer-hall-conference-center>

Newcomb Hall (reserve through curryevents @virginia.edu)

<http://www.virginia.edu/newcomb/>

Colonnade Club (434-243-9710)

<http://im.dev.virginia.edu/wp/colonnadeclub/>





## 4. Agenda/Speakers

Timeline – Soon after your goals, budget, and date are set. You may need to give the speaker several dates if the event can be flexible.

### The BEST Agenda:

- Includes lectures that are limited to 20 minutes, 30 minutes at the most
- Provides regular opportunities for discussion/ audience participation
- Incorporates creative formats for information sharing (panel, case discussions, small groups, etc)



- Engages the audience in networking opportunities
- Includes speakers who can best help you meet the goals of the meeting

### Securing the BEST Speaker:

Do your homework when vetting a speaker!

expertise	personal experience
flexibility	personality
engaging presentation style	

Make sure the speaker:

- is familiar with your goals.
- is familiar with the audience.
- is clear about what you would like him/her to cover.
- leaves time for Q&A.

*tip!*

Choose a speaker you have previously heard present. Find a YouTube presentation and/or get recommendations from others. Just because they are a content expert does not mean they will be an impactful speaker who has the ability to connect with the audience.

***Get the commitment and honorarium in writing.***

***DESIGNING A PRESENTATION WITHOUT AN AUDIENCE IN MIND  
IS LIKE WRITING A LOVE LETTER  
AND ADDRESSING IT: TO WHOM IT MAY CONCERN.***

- ***KEN HÆEMER***

## 5. Marketing and Communication

Timeline: 2-3 months in advance; 4-6 weeks for personal invitations

**Curry Electronic Directories** – Directories are located in both Ruffner and Bavaro and may be used to advertise your events open to the Curry and UVa Community. Curry’s Department of Marketing and Communications has developed design guidelines that can be found at <http://curry.virginia.edu/gateway/current-student/signage>. Postings are reviewed by Curry Student Services and Curry’s marketing team before approval.

**Flyers** – Flyers can be printed from the design created through the Marketing and Communications website listed above. Bulletin boards are located throughout Bavaro and Ruffner for use by the Curry community. On the day of the event, flyers can be posted on the stanchions on the 1<sup>st</sup> floor of Bavaro and in the Library Data Commons, depending on where the event is being held. Please remove all flyers once the event is over.

**Postings in other places throughout Curry are subject to removal.**

**UVa Calendar** – The UVa Calendar is a great way to publicize events to the UVA community. You can submit information for an event on the virginia.edu website (click on “Calendar” at the top).

**Curry Calendar /Social Media** – Events are listed on the Curry Calendar under “What’s Happening” on the Homepage. You can also access the full calendar by clicking on “calendar” at the top of the page. If you would like to have an event posted, email [curryevents@virginia.edu](mailto:curryevents@virginia.edu).

*Tip!*  
Collecting RSVPs is always preferable so you know how many to expect. This is important for planning even if you aren’t serving food.

The screenshot shows the 'What's Happening' section of the Curry website. It is divided into two columns: 'Upcoming Events' and 'News'. The 'Upcoming Events' column lists four events with dates in blue boxes: JUL 16 (Orientation: Kinesiology First Years), JUL 17 (Orientation: Kinesiology First Years), JUL 17 (Undergrad Info Session for Prospective Students & Parents), and JUL 20 (Orientation: Undergraduate Transfer Students). The 'News' column lists three news items with dates: 'Prof. Cornell Honored by Sandy Hook Promise' (07/06/15), 'Local Curry Alumni Educators Get In On the Maker Movement' (07/01/15), and 'Two SURP Interns Describe How They are Preparing for Grad School at U.Va.' (06/24/15). At the bottom of each column are orange buttons: 'VIEW ALL EVENTS' and 'VIEW MORE NEWS'. To the right of the main content is a social media section with tabs for Twitter, Facebook, YouTube, and Instagram. It features two tweets from the UVA School of Ed, one from yesterday and one from 2 days ago. At the bottom of the social media section are icons for Facebook, Twitter, and YouTube under the heading 'Connect With Us On:'.

**RSVPs** – To include RSVPs on your invitations, feel free to use choices available through Google forms, evite, paperless post, or other web options.

## 6. Evaluation

Timeline: "Early and Often;" Plan for it 6 months in advance;  
follow up during and after the event

From the very beginning of event planning, you should be thinking about how you will determine the success of your event. When writing goals and objectives, also plan how you will know they have been accomplished. A sample evaluation tool is provided in the resources section of this document.

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### ***Evaluation is Essential for Continuous Improvement!***

**Evaluation can be accomplished through:**

- Observations during the conference
- On-site feedback from participants
- Survey of participants
- Post-event follow up meeting

**Questions to ask:**

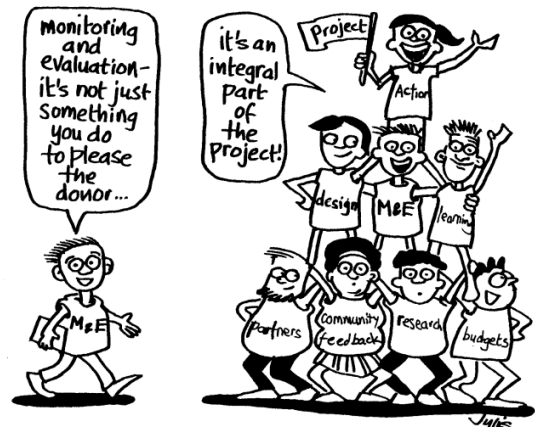
Did we meet our goals/objectives?

Did we meet our budgetary goals?

What could we have done differently to make the event better, more productive, or more effective?

Should we have done anything differently with advertising?

What changes should we make in the future?



***Effective evaluation/documentation creates sustainability for the future.***

## Tips and Lessons

### **Catering/caterers**

When selecting a caterer, consider your budget, audience preferences, and the requirements of the venue (some venues require specific caterers). Most caterers will work with you to stay within budget. All catering orders must go through America To Go (UVA's Purchasing Vendor for catering). Your department contact can process ATG orders.

### **Room/Building Access**

Room/Building access arrangements should always be made prior to the day of the meeting or event through [curryevents@virginia.edu](mailto:curryevents@virginia.edu). Access and facility issues during the event may be reported by calling 434-243-3332.

### **Parking/transportation**

Parking and transportation can add a fair amount to your budget, so consider this carefully. If it is possible to book a hotel close to the venue, it will save on shuttle services. Sometimes participants will park in the Central Grounds parking garage and ask for a parking validation (which could add up to \$16/day per person).

### **Decorations**

Formal events may require a budget for flowers, arrangements, and/or decorations. There are many low-budget items that look very nice for any event or venue, including resources already available at Curry. Fire Marshal regulations regarding no open flames as well as decorations on access doors must be considered (see <http://uvapolicy.virginia.edu/policy/SEC-032>). Feel free to ask the Events Manager (434-243-1644) for ideas, suggestions, and resources.

### **Wireless Access**

Wireless access for conference participants and guests can be obtained on the UVA website for a single person, or a group of people; for one day, or for a number of days: <https://network-setup.itc.virginia.edu/passcodes/passcodes.cgi> (computing ID and UVA password are required).

### **Speaker logistics**

Always, always take great care of your speaker. This sets the tone for their experience here and the reputation of the Curry School. Use the "speaker schedule template" in the resources section of this document to communicate to them where they will be during their visit. When you can, meet them at the airport instead of having them take a taxi.

### **Event Follow-Up**

If you have speakers or participants who will be reimbursed for expenses, use the "reimbursement form" found in the resource section of this document. Make sure all outstanding invoices have been paid. Send thank you notes to appropriate conference

organizers and volunteers. Note cards can be found in the Dean's Office (Bavaro 131) and in Marketing and Communications (Bavaro 335).

## **References and Resources**

Below is a list of resources used for the development of this program.

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### **The Professional Event Planning Guide**

[guidebook.com/Event-Planning-Guide](http://guidebook.com/Event-Planning-Guide)

### **Event Best Practice Guide**

[lanyon.com/EventBestPractices](http://lanyon.com/EventBestPractices)

### **Event Planning Guide – NC Cooperative Extension Service**

[ces.ncsu.edu/.../FCSEventPlanning](http://ces.ncsu.edu/.../FCSEventPlanning)

### **The Event Planners Association**

[eventplannersassociation.com/blog](http://eventplannersassociation.com/blog)

### **Event Manager Blog, Engaging Events**

[eventmanagerblog.com](http://eventmanagerblog.com)

### **Money-Saving Tips for Meeting Planning**

Ontario Convention & Visitors Bureau/Ontario Convention Center White Paper

### **Special Events & Protocol, University of California, Irvine**

[www.specialevents.uci.edu](http://www.specialevents.uci.edu)

### **Playbooks on various aspects of event management**

[www.lanyon.com](http://www.lanyon.com)

### **Event planning checklists and resources**

[www.meetingsnet.com](http://www.meetingsnet.com)

### **Other:**

**University of Iowa Carver College of Medicine**

**University of Wisconsin, Milwaukee Center for Student Involvement**

