



Event Planning Guide

Social change happens through bringing people together to form relationships, create adaptive ideas, and demonstrate collective power. Often, bringing people together in new ways involves planning events, of many different varieties. This guide, and the accompanying worksheet, will give you all of the steps and information you need to plan almost any type of event!

→ USE WITH WORKSHEET: Use this guide along with the [Event Planning Worksheet](#).

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1. Event Foundations

1.1 What can an event accomplish?

Your project's goals may include people you want to reach, learning you want to share, or other, more specific successes in mind. If you're considering holding an event, here is a non-exhaustive list of what an event can accomplish:

- ★ Unites people around a common cause or idea
- ★ Facilitates the sharing of ideas
- ★ Makes it easier to get a larger group of people to do an action item or work together on something
- ★ Time specifically focused around an issue or action or time spent learning from a particular person or people
- ★ Demonstrates power in numbers
- ★ Tells a story or disrupt an existing story

1.2 Theory of Change & Event Framework

If you're ready to begin planning an event, it makes sense for your group to solidify why you'll be holding it, and what you want to accomplish with it.

1. Fill out the [Event Background](#) section of the worksheet.
2. Schedule 1-3 checkpoints during planning where you'll review the sheet from the [Event Background](#) worksheet section to make sure that everything is still in line with your event plan.
3. Brainstorm event ideas.
4. Compile, discuss, propose, and finalize ideas.
5. Write an [Event Overview](#) using the worksheet.

1.3 Setting Up Teams

1. Divide yourselves into teams within your group
 - a. Suggested outline (using this Event Planning Guide): [Publicizing Team](#) and [Logistics Team](#)

2. Have each team break their task(s) into manageable action items and plan them on a weekly or daily timeline
 - a. Report back on each team's task progress when you meet as a full group

2. Publicizing: Team 1

2.1 Messaging & Outreach

1. Consider the [Event Background](#) section of the worksheet, particularly question 4: "Who do we want to attend our event?" This is your audience.
2. As a group, identify 3-5 main methods to reach your audience using the [Publicizing](#) section of the worksheet.
3. Break down the outreach methods, including any other more specific ones which your group has chosen, into individual tasks and distribute them within your team
4. As a group, agree on the deadlines for each task using the [Publicizing Timeline](#) section of the worksheet.

2.2 Follow Up

Digital Strategy

Depending on how active you were on social media, or if you were featured in, or used traditional media to publicize your event, your post-event digital strategy will be different.

1. Create a plan to upload all photos or videos taken during the event in one place, as soon as possible, and designate one team member or photographer to select the best photos and edit them if needed.
 - a. For social media, consider designing a wrap up or thank you post before the event happens, so that it is easy to fill in details (e.g. audience numbers, special guests, photos) and then post quickly.
2. If you hope to get feedback from participants, or you gave action items during the event (go back to the [Event Background](#) worksheet section, question 3), include this information in your wrap up graphics, announcements, etc.

Outreach Follow Up

1. Create a plan to thank anyone who has supported throughout your event planning process, including mentors, teachers, and organizations.
 - a. Thank you cards signed by team members are always lovely to receive, but if there is a way to personalize whatever you are doing (e.g. photo, art, or handout from the event), those things are the most thoughtful.
2. Designate one person to follow through on these thank yous (e.g. prepare and sign cards in advance) so that in the exhaustion and busyness of wrap up, everyone is still acknowledged.

3. Logistics: Team 2

3.1 Roles

1. Fill out [Event Roles](#) section of the worksheet, adding any missing roles and figuring out who from your group will fill them
 - a. Your group might have naturally taken on different areas already, but finalizing roles will make communication between roles easier and help tasks get done
 - b. It's possible for one person or team to take on multiple roles, but whenever possible try to eliminate the chance that they will be needed for many things at the same time (on the day of the event, or leading up to it).

For example, the live streaming person could coordinate photographers, since they would just need to direct them to areas of the venue before the event starts, but it wouldn't make sense for that person to also be a speaker.

3.2 Budget

Depending on your budget and the nature of your event, you may or may not need to designate someone to manage the financial aspects of your project. That being said, it's always helpful to have one person tracking your budget—usually on a spreadsheet, or even by hand—who others can give their receipts to and be reimbursed by.

3.3 Mapping

1. Visit and make a map of the layout at the location(s) your event will take place—as a whole team, or with team members in roles which are relevant.
2. Plan out your route if needed
 - a. [maps.ie](https://www.maps.ie) is a helpful tool for mapping routes

3.4 Equipment

1. Fill out the [Equipment List](#) section of the worksheet —as a whole team, or with team members in roles which are relevant.
2. Consider whether you need decorations, signs, other additions that you will need to make yourself
 - a. Schedule and hold art builds (events where people create art or signage for an event) if needed
3. Place all equipment, decorations, etc. on the location map

3.5 Schedule & Facilitation

1. Fill out the [Event Schedule](#) in the worksheet and finalize it as the event approaches—as a whole team, or with team members in roles which are relevant.
2. Suggestions to include:
 - a. Land acknowledgement at or near the beginning
 - b. Speeches based on the main messaging (consult with [Team 1 - Publicizing if needed](#))
 - i. Refer to [Story of Us & Now in the Storytelling Guide](#) for public speaking tips. Refer to the [Being an Ally section in the Reconciliation Guide](#) for knowledge about how much space you should take up at an event.
 - c. Written transitions between speakers or scheduled items

3.6 Recruitment

1. Read the Y4CA [Recruitment](#) guide to learn more about recruitment.

2. Consider whether or not collecting participant information would make sense for your project. Will you need to follow up with participants afterwards? Will you want to invite them to a second event? Do you want to get them involved?
3. If you decide to collect participant information, refer to the [Data Collection](#) section of the Worksheet for a sample sign up sheet.

3.7 Debriefing

If you have an existing way of checking in with your team members around everyone's capacity and wellbeing, use that process to build an event debrief.

1. **Consider your timeline:** Choose a date where your members can commit themselves fully to debriefing and won't be worrying about catching up on missed schoolwork or sleep, but where your thoughts about the event will also still be fresh.
 - a. Consider recording a quick brainstorm debrief immediately following the event, then coming together 2-5 days later to solidify your original thoughts, and to check in more deeply with one another.
 - b. Whatever you decide, create a plan and share it with your team before your event happens.
2. **Community care:** Before diving into the nitty gritty of what could have gone better, take time to celebrate being finished your event and make sure that everyone's needs are met and that they feel comfortable reflecting on the event together.
 - a. Show your **appreciation** for your team members. Sign cards for one another or hold a gratitude circle. Spend time with each other without working on your project.
 - i. **Gratitude circles:** Have your team sit or stand in a circle. Give someone a chance to share what they appreciate about the person to their right. Then have the person to their left share what they appreciate about the original speaker. Continue around the rest of the circle. (This process also works well for giving feedback or brainstorming.)
3. **Feedback process:** Work together to design a debriefing process before your event ever happens, including space for highlights and lowlights, as well as

considerations for going forward, whether they are for another event, or for your team as a whole. A suggested feedback practice is explained [here](#), within the Y4CA Feedback & Coaching guide.

4. Tips for Digital Events

4.1 General Guidelines

Organizing an online event may seem easier, but they often come with their own particular challenges. The following general guidelines are essential to take into account when designing any type of digital event.

1. Familiarize yourselves with (and brainstorm, if needed) the different types of digital events you could plan. Some examples include:
 - a. Panel (with or without audience participation; asking questions only)
 - b. Dialogue/discussion (with audience participation; asking questions and discussing)
 - c. Consultation (with a certain group, demographic, or with an authority figure and your group as the consultees)
 - d. Teach-in (educational event)
 - e. Training and action session (lead participants through the process of letter writing, phone banking, or any other action you wish them to take)
 - f. Livestream of a physical event
 - g. Digital benefit concert
 - h. A series of one or more of these events
2. Familiarize yourselves with the different types of online platforms using Training for Change's guide [here](#), and then familiarize yourselves specifically with the platform you choose.
 - a. It may be helpful to designate 1-2 team members to take the lead on planning the tech aspects of the event, but ensure your whole team is prepared and understands the platform you'll be using.
3. Consider accessibility when designing your event. Attending something online can be more draining than attending something in person: do you need to set aside time for breaks?

- a. Any other accessibility considerations you would include at an in-person event, such as ASL interpretation, should be taken into account when planning online events: for instance, providing closed captioning instead.
4. Discuss security beforehand, including having a sign up page on your website, or on a ticketing platform like Eventbrite, even if your event is free. It's also possible to send participants a link to join your event through their email, rather than making it public, and to implement measures like a waiting room, or require a password to join.
 - a. Refer to [Training for Change's more detailed guide](#) on dealing with disruptors online.
 - b. Consider using a moderator, whose job is simply to keep an eye on any platform functions open to participants (e.g. a live chat), and who can intervene or remove participants as necessary
5. Provide a list of guidelines during your introduction section. Include ground rules like participants always muting themselves, using the chat for questions, and suggestions tailored to your event, such as whether or not you would prefer to have participants turn on their video, and whether they need any materials to make the most out of your event.
6. For more information about leading groups online, [Training for Change has a free downloadable e-book available](#).

4.2 Engagement

It can be more difficult to interact with participants digitally, so the following is a list of suggestions for how to engage your participants to the best of your abilities.

1. Your team may be skilled in improvising transitions, or dealing with crises while in-person, but everything becomes more difficult when you are not all in the same space. Preparation is helpful when running an online event, and consider including small things like verbally passing to the next facilitator, or private messaging your guests to alert them before they are asked to speak, which can make everything run more smoothly.
2. It can be helpful to identify a goal for participants to work towards, whether it is "graduation" from a series of trainings you are running, participation from every single attendee, or a complete set of brainstorm.

3. Techniques for use with participants you expect to participate less in your programming include:
 - a. Asking for read-aloud (builds confidence without participants having to contribute original thoughts on the spot)
 - b. Using a live chat (provides participants with more preparation time and lower stakes when they engage)
 - c. [Mentimeter](#) or [Jamboard](#), which are both virtual “sticky note” platforms for use when brainstorming (provides participants with more preparation time but records ideas for use later in the event, or for your team’s reference afterwards)
 - i. These may not be accessible for participants calling on their phones without a computer at hand.
4. Techniques for use with participants you expect to participate more in your programming include:
 - a. Open discussions
 - i. Ensure you have a facilitator who has prepared notes and/or discussion prompts ahead of time, and who is comfortable directing the conversation
 - ii. Consider using the “stack” system in a chat to track speaking order:
 1. Send * in the chat to make a point
 2. Send ** in the chat to make a direct response (jumps to the head of queue)
 3. Send ++ for agreement
 - b. [Zoom breakout rooms](#) (randomized or manually created), for use in larger groups when you want more individual engagement between participants
 - i. These can also be helpful when sorting participants by a topic of choice, into age categories, or through another system
5. Energizers throughout your event, whether or not they are related to the programming, can change the event’s pace and include:
 - a. Stretch breaks/shake outs encourage participants to change positions and move around

- b. Mandatory audio-only (turn off participants' video) sections provide time for participants to rest their eyes
 - c. Check ins and check outs allow participants to get used to the event's atmosphere, to transition out of it and back into their days, and/or to get to know one another
- 6. Be creative! Although running something digitally might be less than ideal for your team, it does also have certain benefits—use them to your advantage!

5. The Day Of

5.1 Running the Agenda & Troubleshooting

It's important to have a plan, including a set schedule and roles, but flexibility is often just as needed as preparation during your actual event. If possible, **set aside time as a group 2-5 days before the event happens, to run through the schedule together**, and troubleshoot possible times when the participants may feel confused or bored, and any changes that you might need to make to change this.

Important considerations:

1. If you have a **script**, or your team is in charge of **MCing** or making a **speech**, read everything aloud to the group to check that it is clear, not too wordy, and works with the messaging of your event.
2. If any **technology** is involved, test it all beforehand whenever possible.
3. If you have special guests, teams of volunteers, or other **people who are essential to the event happening** and not from your team, make sure that you designate one or multiple team member(s) to meet with them before the event, coordinate where they will be while it is happening, and communicate any changes.

That being said, an event doesn't have to be perfect for its participants to have learned something from the experience—be patient with yourselves and one another, and ground yourselves in the important messages you're sharing.

5.2 Communication

You're more likely to feel confident in your event if your team can communicate with each other while it is happening.

1. **Identify methods of communication:** Consider whether cellphones will be enough to reach one another. Do you need a group chat with your whole team specifically for the day of? Does everyone on the team have data, or can you use text messages? Will you need to turn your ringers off?
 - a. Consider designating check in points throughout the event, or having everyone report to one team members (e.g. the event coordinator) so that your communication is consistent and clear.

- b. Test these methods of communication or check in points when you run through the event beforehand.
- 2. **Clearly designate roles, and in some cases, hierarchies:** If you anticipate changes to the schedule being needed, designate which team members and roles are responsible for making these decisions and communicating them to the rest of the team.
 - a. Consider pairing team members in similar roles, or having people with smaller roles support those with larger roles. If they will communicate well together and consult one another, it can be reassuring not to have to make big decisions alone.
 - b. If you anticipate big decisions being needed very quickly, or resistance of any kind from participants or bystanders, **it is crucial to decide as a team who will have final say in how your team responds.**
 - i. As a team, try to predict any specific situations which might arise before, during, or after your event, and then agree beforehand about which of you will be responsible for coordinating a response.
- 3. **Trust:** Above all else, communication is most effective when you can trust everyone on your team to make informed decisions and consult one another when needed. Because of this, it can be helpful to reflect on your team's dynamics in the weeks and days leading up to your event.
 - a. Is there conflict you need to address as a group?
 - b. Do you each know enough about the different aspects of the event?
 - c. Will you feel comfortable asking one another for help, or supporting one another in snap decisions?
 - d. If you identify possible or existing conflict(s), or are unsure about your team's relationships, it would be a good idea to refer back to the Y4CA Conflict Resolution guide [here](#).