

EVENT HANDBOOK AND HOW-TO

Event Planning Handbook & How-To

This handbook and how-to for event planning is a reference guide with reusable resources to assist in event planning and execution. Print and use relevant pages for any event planning or evaluation needs.

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Pre-Event Planning Considerations

Basic Information

Event Name	Speakers/Special Guests	Purpose	Key Messages
Event Date/Time	Expected Attendance	Goals and Objectives	Outcomes
Event Location	Target Audience	Budget	

Event Collaborators and Partners

Is this event hosted by your organization, or will it be a collaboration with other groups/partners?

- If it is hosted by your organization only, do the current members have the capacity and budget to complete the project successfully?
- If it is a collaborative effort, who are the partners? Are they internal to WCU or external?
- What tasks/areas will other partners be responsible for?
 - Who will delegate tasks to partners? Will they contribute financially?

Is this event going to be DegreePlus designated?

Is this event going to need volunteers?

- If so, how will they be recruited?
- What tasks will be delegated to them?
- Who will manage them?
- What incentives will be provided to them?
- How will volunteer feedback be gathered?

Guests

How will your guests know of the event?

What parking accommodations will your guests need?

Will you need to arrange travel to/from the university?

Will you be giving out gifts to your speakers and/or attendees?

Will you need to print up nametags for your guests?

Are you expecting guests with disabilities?

If so, what special accommodations need to be arranged?

Physical Needs

Will you need tables, chairs, etc.?

- If so, what size, shape, and style do you need?
- How many do you need?
- How would you like to have them arranged?

Will you be serving food or beverages?

- Do you expect any guests with special dietary needs?
- Will you use an outside vendor or Aramark (campus food services)?

Will you need any audio/visual equipment?

- If so, what equipment will you need?
- Will you need Internet or phone service in the room?
- Will you need someone to help you run the equipment?

Preparing the Space

Will you need to have the room cleaned? Before, afterwards, or both?

How complicated is your set-up? Will you need to reserve extra time to accommodate for it?

Is your event on the weekend or after-hours?

- Will you need to have someone unlock the room?

Marketing

Is your event going to be private?

- If so, will you need to print up invitations?
- Are VIP's present?
- Is social media appropriate?

Is your event going to be public?

- Have you contacted higher ups for an assessment of your event?
- Is there a news making speech or announcement that will be made?
- If so, will you need to print up flyers or advertising posters?
- Will you want to run an ad in the Sylva Herald or on community radio stations?
- Add the event to your organization's Calendar of Events.

Assessment

How will you know that the event was a success overall?

How will you measure if the goals and objectives of the event were met?

If the event is recurring, how will you collect information for future changes?

How will you record feedback from participants, attendees, planners, and volunteers?

Who will you present final event and assessment data to?

What mode/format will you use to present final event and assessment data?

Event Planning Checklist

Timeline	Task
Pre-Event (Time Frame Varies)	Consider the questions in the “Pre-Planning Considerations” section
	Fill out the “Event Planning Brief” document
	Identify key logistics team and/or committee members
	Review last year’s debrief/framework
	Schedule kickoff meeting
	Create budget estimate
	Determine key dates and add to calendar as blocks
	Determine fund numbers
	Identify target audience and invitee list
	Schedule Outlook/calendar holds for logistical staff
	Determine desired venue availability and reserve date
	Review campus events before finalizing date
	Create event in Engage
	Determine if specific swag is needed
	Send “save the date” card
	Reserve venue
	Create event briefing
	Identify speaker/host
	Obtain contract for non-WCU spaces, catering, and entertainment
	Determine invitation strategy and format
	Create registration/RSVP form
	Schedule planning session meetings
	Develop communications schedule & deadlines – invite, follow up, know before you go, etc.
	Schedule debriefing for post event
	Secure entertainment
	Submit photography/videography request from University Communications and Marketing
	Finalize invitation design
	Submit parking requests (blocking off lots, etc.)
	Submit equipment request – tables, chairs, podium, AV equipment, etc.
	Submit catering request
Submit facilities request – greenery, moving furniture, trash cans, clean up, etc.	
Create a program to hand out to guests at event	
Submit all printing requests to WCU Print Shop	
Determine if post event story is needed, if so, place request with University Communications and Marketing	
Determine if specialized speaker/host gift is needed and order accordingly	
4 months before events	Ensure all logistics have been finalized
	Follow up on any loose ends (menu adjustments, swag status, décor, signage, etc.)
	Determine volunteer need and tasks

2 months before event		Send out invitations and registration/RSVP link
		Send out call for event volunteers
One month		Put up fliers around campus
		Finalize agenda for attendee communication
		Approval for agenda, handouts, etc.
2 Weeks Before Event		Email approved agenda/handouts to attendees
		Submit digital signage request
		Confirm all vendors – including campus partners
		Finalize briefing and share with campus partners
		Submit speaker/host gift request if needed (for non WCU partners only)
		Determine if additional communication is needed
		Create materials for volunteer training
		Restock event toolkit as needed
		Send out reminder/finalize attendants
		Finalize headcount for catering
		Send out “need to know” info to attendees
1 Week Before Event		Ensure nametag supplies available
		Obtain printed materials (program, tent cards, etc.) and review for accuracy
		Start making posts for event on social media
		Finalize volunteers and designate tasks on internal document
Day Before Event		Ensure volunteers have complete training
		Gather all items on briefing/load vehicle
		Print out master script (copies for event owner, and each speaker)
		Set up venue if possible
		Finalize nametags
Day of Event		Communicate with volunteers regarding their roles for the event, send out “need to know” information
		Arrive early
		Sign in volunteers
		Complete tech run through
		Make a “story” post on social media
		Load in remaining items if necessary
		Capture improvements in writing for debriefing
		Ensure attendance list is returned to event owner
3 Days Post Event		Load out from venue
		Update attendees
		Thank you to volunteers and send feedback survey
		Debriefing meeting – compile feedback and meeting notes into one final document
		Follow up with vendors – pickups, returns, planting, etc.
	Send thank you notes to speakers/hosts	

EVENT PLANNING BRIEF

Event Name:

Event Date:

Start Time/End Time:

Location:

CONTACT INFORMATION

Event Organizer Name:

EVENT STRATEGY

Purpose:

Goals and Objectives:

Event Name:

Date:

Target Audience:

Key Messages:

LOGISTICS

Event Format/Set-up:

Menu:

Entertainment:

Estimated Budget:

Audio/Video:

Event Name:

Date:

Party Supplies:	Decorations:
Gifts/Swag:	Clean up/Take-down Plan:

Security Needs:

COMMUNICATION & DESIGN

Communication Methods:

Design Needs:	PR Needs:
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Event Name:

Date:

Photography:

SERVICES TO CONTACT

Scheduling:

Risk Management:

Guest Services:

Ticketing:

Production:

Parking:

Custodial:

Facilities:

Event Name:

Date:

TIMELINE

Date:	Action:	Responsibility:	Completed:

ASSESSMENT & EVALUATION

Data To Collect: 	Data Presentation Plan:
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Event Name:

Date:

Marketing & Design Checklist

Timeline	Task	Purpose/Instructions
4 Months Before Event	Schedule internal brainstorming session about design of promotional materials for the event	
3 Months Before Event	Design/order specific swag, if necessary	4imprint is typically affordable and easy to work with
	Design a “save the date” card	Use Canva Instagram post square template to easily include the graphic in email bodies, internal distribution, and newsletters
	Create a written event description blurb	This blurb should be 2-3 sentences, include logistical details about the event (time, place date) and what the event is for. These blurbs will be used to generate social media posting captions, used on Engage, and used in email communications about the event.
	Design an Engage cover photo	Use Canva “Engage Cover Photo” template. This photo should follow an pre-determined design strategy. The photo represents the event and is a good way to catch attention on Engage for potential attendees.
	Add event to Engage	See instructions for how to make a post. If desired, use the RSVP function on Engage to determine the potential turnout of the event. If the event is DegreePlus designated, the RSVP function cannot be used. Other RSVP links can be added into the description of the event, if desired, such as signup genius.
2 Months Before Event	Create social media cards <ul style="list-style-type: none"> • General • Event-specific • Specific facts/information <i>(Ongoing task)</i>	These graphics can be used on social media, included into email bodies to interested attendees, or for other offices to disperse to their audiences. Using Canva <ul style="list-style-type: none"> • Template for Instagram post size – Use for posting on Instagram and Facebook • Template for Engage cover photo
	Create flyers <ul style="list-style-type: none"> • General • Event-specific • Specific facts/information 	Print in color in Belk or using the Print Shop (if needing 150 flyers or more). Place flyers on bulletin boards in Belk, Courtyard Dining, UC, Coulter, Killian)

		<i>(Ongoing task)</i>	
		<p>Create digital signage</p> <ul style="list-style-type: none"> • General • Event-specific <p>Specific facts/information</p>	<p>Using Canva</p> <ul style="list-style-type: none"> • Template for digital signage <p>Submit ticket to get them put up around campus</p>
		Submit Inside WCU and Story Request	<ul style="list-style-type: none"> • Submit a UCM Request • Check the boxes to submit Inside WCU and WCU story (if applicable) • Fill out the request form and provide information regarding the content of the story <p>This story will be written, published, and shared</p>
		Targeted emails for attendees	
Ongoing		Share materials on social media	<ul style="list-style-type: none"> • When posting to Instagram, send all stories and posts to the following accounts: <ul style="list-style-type: none"> ○ western_carolina ○ wcucampusactivities ○ ica.wcu <p>If a post relates to another office/organization, send the posts to that organization to share as well (ex. Homebase, a specific WCU college, etc.)</p>

Post-Event Assessment & Evaluation Plan

A critical component to event success is assessment and evaluation of the event. The next section of this handbook outlines some suggestions for gathering metrics and information regarding event feedback. Assessment of events can be used in end-of-year department reports, for internal process improvements, for financial reporting, and more.

Event assessment and evaluation should be a consideration throughout the entire planning process. Create an assessment plan and specific, measurable goals prior to the event. These will be documented in the event brief and reported on during the post-event debriefing meeting. Choose which metrics will be measured and develop measurement tools to document them accordingly.

Before an event takes place, determine if there are stakeholders that require specific data to be collected. Decide on a format of data and feedback presentation and complete reports in a timely manner after an event. Data presentation could include a written report to committee members, a verbal report during the final debriefing meeting, or a visualization of feedback sent out to stakeholders electronically.

Example Data Points to Collect

Committee or Focus Group Participation

- Number of committee members
- Number of different departments involved
- Number of focus group attendees
- Number of RSOs involved
- Feedback survey from committee members
- Feedback survey from focus group

Evaluating Events Through Participants

- Number of attendants
- Number of people who completed polls/surveys/trivia
- Event poll feedback
- Items collected at the events (donations, money)
- Pre and post knowledge surveys

Evaluating Marketing Strategy and Social Media Posts

- Number of interactions (likes, comments, shares, reposts)
- Content of interactions (comments, direct messages, etc.)

Event Evaluation Form

Event Information			
Event Title		Date	
Organizer		Time	
Location		Attendance	

Rating Scale: 1 = Subpar 2 = Satisfactory 3 = Average 4 = Good 5 = Excellent

Criteria	Comments	Rating
Was the event successful?		
Rate attendee satisfaction.		
Was the planning process successful?		
Rate effectiveness of event materials.		
Rate facilities & location.		

Score Out of Possible 25 _____

Would you recommend holding this event again? Why or why not?	
What improvements should be made for future events?	

Additional Comments

Guidelines for Post-Event Assessment Surveys

Feedback should be collected immediately after an event takes place through an online form. Ensure that feedback is collected from all audiences involved in the event, such as committee members, volunteers, campus partners, event attendees, etc. Feedback should always be collected anonymously, with the option for survey participants to include their identifying information if they would like to.

Audience	Purpose	Example Questions
Attendees	Personal information (make options)	Name, Organization Name, Contact Information
	To collect feedback about different aspects of the volunteering experience	Please rate the following statements based on your experience at the event. Set the Likert scale to Highly Dissatisfied → Highly Satisfied <ul style="list-style-type: none"> • Ease of registration process • Communication from CCESL regarding the event and logistics • Clarity of tasks and instructions • Assistance of the volunteers during the event • Attendance in your session during the event • Engagement of attendants in your session during the event • Ease of finding presenter check in location Ease of presenter check in process
	To collect information about the most successful parts of the attendee experience	What was the best part of attending this event?
	To collect information about aspects of the attendee experience that should be improved	What would have made the experience better?
	To collect information about the overall satisfaction of the attendee experiences and about what groups can be recruited again if the event is recurring	Are you or your organization likely to attend this event next year?
	To collect information regarding any other misc. attendee feedback. These	Please share any additional comments or concerns.

	comments are good for quotes to incorporate into feedback summaries of the event.	
Presenters	Personal information (make optional)	Name, Organization Name, Contact Information
	To collect feedback about different aspects of the volunteering experience	<p>Please rate the following statements based on your experience at the event.</p> <p>Set the Likert scale to Highly Dissatisfied → Highly Satisfied</p> <ul style="list-style-type: none"> • Ease of registration process • Communication from CCESL regarding the event and logistics • Clarity of tasks and instructions • Assistance of the volunteers during the event • Attendance in your session during the event • Engagement of attendants in your session during the event • Ease of finding presenter check in location • Ease of presenter check in process
	To collect information about the most successful parts of the presenter experience	What was the best part of participating in this event?
	To collect information about aspects of the presenter experience that should be improved	What would have made the presenter experience better?
	To collect information about the overall satisfaction of the presenter experiences and about what groups can be recruited again if the event is recurring	Are you or your organization likely to present at this event next year?
	To collect information regarding any other misc. presenter feedback. These comments are good for quotes to incorporate into feedback summaries of the event.	Please share any additional comments or concerns.
	Personal information (make optional)	Name

Volunteers	To collect feedback about different aspects of the volunteering experience	<p>Please rate the following statements based on your experience at the event.</p> <p>Set the Likert scale to Highly Dissatisfied → Highly Satisfied</p> <ul style="list-style-type: none"> • Ease of registration process • Ease of access to volunteer training • Content of volunteer training • Communication from CCESL regarding the event and logistics • Clarity of tasks and instructions • Ease of finding volunteer check in location • Ease of volunteer check in process • Ease of volunteer check out process
	To collect information about the most successful parts of volunteering were	What was the best part of volunteering at this event?
	To collect information about aspects of the volunteering experience that should be improved	What would have made the volunteering experience better?
	To collect information about the overall satisfaction of the volunteer experiences and about what groups can be recruited again if the event is recurring	Are you likely to volunteer at this event next year?
	To collect information regarding any other misc. volunteer feedback. These comments are good for quotes to incorporate into feedback summaries of the event.	Please share any additional comments or concerns.
Committee Members	<p>To collect information regarding their experience serving as event support.</p> <p>This type of feedback can be much more informal than others, including verbal feedback during the event debriefing meeting.</p>	<p>Did you find the experience of being a committee member valuable?</p> <p>Did the committee meetings work with your schedule?</p> <p>Did you feel that the meetings were productive and efficient?</p> <p>Were you satisfied with the event outcome?</p> <p>Please share any additional comments/suggestions for improvement.</p>

Social Media Posts

Platform	Purpose/Instruction
Instagram	<p>The best type of content for Instagram is a combination of post types, such as short-form videos and “traditional” posts. There should be a heavier lean towards information pictures, rather than detailed captions.</p> <p style="text-align: center;">Audiences for Post Types</p> <p><i>Stories</i> – Primarily followers, some non-followers if they are reposted <i>Posts/Pictures</i> – Primarily followers <i>Reels</i> – Primarily non-followers</p>
Facebook	<p>The best type of content for Facebook are “traditional” marketing approaches and posts with pictures and a basic caption. There should be a heavier lean towards descriptive captions than emphasis on the picture.</p> <p style="text-align: center;">Audiences for Post Types</p> <p><i>Stories</i> – Primarily followers, some non-followers if they are reposted <i>Posts/Pictures</i> – Primarily followers <i>Reels</i> – Primarily non-followers</p>

Creating a New Event on Engage

Access to Your Organization’s Administrative Page

In order to become an editor to add events to your organization’s page, you must be invited to the page by a current officer/administrator as position that has editor access. The invite will appear in the your email inbox. The officer needs to accept the invitation and they will become a member of your organization’s Engage page.

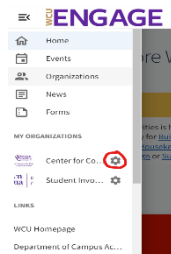
Posting Events

Engage is the platform that is used to post events and service opportunities. Events can be easily edited after they have been posted, so the only information necessary before making a post is as follows:

- A Cover Photo
- Event Name
- Event Date
- Event Time
- Event Location
- Event Description

It is best practice to post an event to Engage as soon as possible, to allow the maximum amount of time for potential attendees to sign up to attend. Even if all of the event details are not completely finalized, post the event with the information that is available.

- Go to <https://wcu.campuslabs.com/engage/>
- Hit “sign in”
- Hover over the gear icon next to your organization’s page
- Click “Events”
- On the events page click “+ Create Event”
- Enter the title of the event
- For “Theme” always select an option that most closely aligns with the event.
- In the description, write about what the event is and its purpose.
 - If volunteers are needed to assist with this event, a volunteer signup form link can be included into the description.
- In the area that says “Additional organizations co-hosting”, select any other campus partners who are involved in the planning or hosting of the event.
- Select date and time of the event.
- Under the date is the location of the event.
 - Add the “helpful map” and input the address for the event location.
 - The location name will populate for each additional occurrence, but the “helpful map” address will not.
- Depending on the event, choose either “Show to the Public” or “WCU Staff/Students”.
 - Use your discretion for this decision.



- If space is limited for the event, select “WCU Staff/Students”, but if the event’s goal is to reach a large audience, select “show to the public”.
- Select any applicable perks for that event.
- Include if there is a rain location.
 - If not, just type “NA”
- Include if there is a cost associated.
 - If not, just type “NA”.
- Hit “No” for DegreePlus events.**
 - If an event is DegreePlus, you will be told ahead of time. Another staff member can edit the posting later, since more information is needed to fill out the DegreePlus form.
- Hit “next”.
- Leave “Who can RSVP” as “Anyone”.
- Leave “Limit Number of Available RSVP Spots” as unchecked, unless there is a pre-determined space limit on the event.
- Leave “Allow Guests” as unchecked.
- Leave “Allow Respondents to Represent an Organization” as unchecked.
- Leave all of the Post Event Feedback sections blank and/or unchecked.
- Hit “Next”.
- Include the designed event cover photo.
- Hit “Next”.
- Ignore the message regarding scheduling event space and hit “next”.
- Check “allow attendance to event to be present on the co-curricular transcript”.
- Submit event.

Once submitted, the event will be auto approved and go live on Engage instantly. Changing event details is simple, but it does require the editor to go through every page again and resubmit the event. You have the ability to message events respondents from Engage, which is helpful in the event of a cancellation.

Flyer Locations for WCU Campus Buildings

The locations that are highlighted are important areas to post flyers in, as they are high-traffic areas.

Building	Floor	Structures	Room #	Supplies	Notes
Residence Hall Min. 78 Max. 133	Bring to Res Life staff in the Brown Building 2 nd floor for approval and distribution.				
Bardo Min. 6 Max. 12	1	Column	Entrance	Push Pins	
		Bulletin Board		Push Pins	Walk down hallway
	2	Column		Push Pins	
Belk Min. 10 Max. 28	1	Bulletin Board	161	Push Pins	
		Stairs	161	Tape	
		Stairs	104	Tape	
	2	Stairs	285	Tape	
		Bulletin Board	279	Push Pins	
		Wall	281	Push Pins	
		Wall	273 – CCESL	Tape	
		Stairwell	266	Tape	
		Bulletin Board	266	Push Pins	
	3	Bulletin Board	WALC	Tape	
		Case	304	Tape	
		Stairwell	304	Push Pins	
		Bulletin Board	305	Push Pins	
		Sliding thing	308A		
		Bulletin Board	331	Push Pins	
		Bulletin Board	332	Push Pins	
		Bulletin Board	333	Push Pins	
		Bulletin Board	335	Push Pins	
		Bulletin Board	336	Push Pins	
		Bulletin Board	337	Push Pins	
		Bulletin Board	339	Push Pins	
Stairwell		363	Tape		
Bulletin Board		379	Push Pins		
Wall	385	Tape			
Stairwell	391	Tape			
Bulletin Board	405A	Push Pins			
Case	411	Push Pins			

Brown Min. 3 Max. 4	All	Doors		Tape	Not really any stairwells, but open flight of stairs at 2 nd floor and elevator, can hang stuff and doors. No bulletin boards.
Coulter Min. 13 Max. 15	1	Bulletin Board	4 Boards in Lobby	Tape & Push Pins	
	2	Bulletin Board	4 Boards in Hallways	Tape & Push Pins	
	3	Bulletin Board	Its Beside the Elevator	Tape & Push Pins	
	4	Bulletin Board	4 Boards in Hallways	Tape & Push Pins	
Courtyard Dining Min. 1 Max. 2	1	2 Bulletin Boards	To the right of the main front entrance	Push Pins	
Forsyth Min. 6 Max. 9	1	Bulletin Board	104	Give 6 flyers to the office employees and they will post them	
HHS (Digital Signage Throughout) Min. 3 Max. 6	1	Bulletin Board	Downstairs Common	Push Pins	Downstair Study
	2	Java City Wall	Java City	Tape	Ask employees before posting
	2	Bathrooms		Tape	Behind Java City
	3	Bulletin Board	33	Push Pins	Left at the top of the stairs
	3	Bathrooms	Left at stairs	Tape	Near social work
	4	Bathrooms	Left at stairs	Tape	
Killian Min. 3 Max. 6	1	Bulletin Board		Tape/Push Pins	Near entry/charging table
	2	Bulletin Board		Tape/Push Pins	Near entry/water fountain
	3	Bulletin Board		Tape/Push Pins	Top of stairs
Library Min. 2	1	Bulletin Board		Push Pins	By front door (2)
		Bulletin Board		Push Pins	By Bathrooms

Max. 5		Bulletin		Push Pins	By front door out
	Ground	Brick Wall		Tape	Entrance to tech commons
McKee (Hang in Stairwells) Min. 3 Max. 6	Ground	Bulletin Board	130	Push Pins	
	1	Bulletin Board	Near G22	Tape/Push Pins	
Apodaca Min. 5 Max. 10	Ground	Bulletin Board		Push Pins	Across from lecture hall
	Ground	Bulletin Board		Push Pins	
	1	Bulletin Board	118	Push Pins	
		Bulletin Board	106	Push Pins	
	2	Bulletin Board	E215	Push Pins	
	3	Bulletin Board		Push Pins	Next to Stairs
		Bulletin Board		Push Pins	Next to Stairs
4	Bulletin Board		Push Pins	Next to Stairs	
Killian Annex Min. 3 Max. 6	1	Bulletin Board	Left Door	Push Pins	
	2	Doors	Advising	Tape	
		Bulletin Board	Advising	Push Pins	
Reid Min. 2 Max. 6	1	Glass Panel	150	Tape	Home
		Bulletin Board	112	Push Pins	Near Gym
		Mirror/Stall Door	119	Tape	Women's Restroom
		Mirror/Stall Door	115	Tape	Men's Restroom
		Bulletin Board		Push Pins	Front Entrance
		Mirror/Stall Door	101	Tape	Restroom
Stillwell Min. 6 Max. 12	1	Wall	138A	Tape	
		Column	143	Tape	
	2	Wall	222A	Tape	
		Column	227	Tape	2 Columns

		Column	245	Tape	
		Column	314	Tape	
	3	Bulletin Board	322B	Push Pins	Next to stair B
		Column	335	Tape	2 Columns
		Column	355	Tape	1 Column
	4	Column	430	Tape	
		Column	448	Tape	
		Column	463	Push Pins	Next to Printer
University Center Min. 3 Max. 6	N/A	Bulletin Column	N/A	Push Pins/Staples	This column is outdoors near the Coulter building and the UC
	1	Bulletin Board	Entrance	Push Pins	To the Left
	2	Bulletin Board		Push Pins	To the Left
		Bulletin Board		Near Mail Room/On Right	Push Pins
HOMEBASE	1	Bulletin Board	Entrance	Push Pins	