
Event Planning Guide

Tips for a successful camp, conference and retreat

Events produce amazing results in motivation, team work, education, personal enrichment, and relationships. Something powerful occurs when group members are brought out of their everyday lives and placed in a beautiful natural setting in temporary community with others where they live, laugh, and learn together. Whether you are planning a youth camp, a spiritual retreat, or an educational conference, certain planning steps can make all the difference in the purposes that are realized.

These planning tips are offered not only to help with events at Warm Beach Camp and Conference Center but with any such things in the future. We hope this input assists you to reach all of your event objectives.

Planning Guide Steps:

1. Begin with the end in mind: Clarify your purpose and goals
2. Planning the program
3. Working with speakers and musicians
4. Working with your site partner
5. Staffing
6. Working with volunteers
7. Finances
8. Marketing and Promotion
9. Evaluating your event's success
10. Saying "thank you"

Event Planning – Step 1

Clarify the purpose and goals for your event.

Questions to ask:

How does this event support the mission/goals of your program or organization?

Who will be attending? (age group, gender, location, etc.)

What are their needs?

What are their interests?

What do you want to see accomplished in their lives as a result of this event?

Can you write down the purpose in one to three sentences?

Describe three to five goals you have for this event.

How will you measure the results?

Effective program planning begins with understanding your purpose.

You accomplish this by knowing who you are serving, what needs you are trying to meet, and what outcomes you desire to see. An effective event also supports the mission and goals of the sponsoring organization. Effective measurements need to be considered at the beginning of the planning process. While not every benefit and desired outcome can be completely measured, developing a means of evaluating program success will keep you accountable to your leadership, your constituents, and to your goals.

Goal Setting

Choose SMART Goals:

S – Specific M – Measurable A – Achievable R – Realistic T – Time Bound

1. **Goal/Objective.** Briefly describe each goal/objective and when it should be accomplished
2. **Measurement.** How will the goal/objective be evaluated?
3. **Importance.** A goal may be Essential, Important, or simply Desirable. Be sure to understand the relative priority placed on an individual goal.
4. Consider goals/objectives as desired outcomes for your organization, for your attendees, with respect to personal enrichment, learning, health/safety, financial.
5. Take time to write down goals, measurements, and importance.
6. Keep the list reasonably short and simple enough to be understood by the whole leadership team.
7. Engage your whole leadership team in formulating your event's purpose and goals.

Event Planning – Step 2

Planning the program.

Given your understanding of the purpose and goals of your event, what will you do with the time available? Each activity or time-block should support your goals/objectives.

1. **Theme:** Developing a simple, clear, compelling theme adds coherence to your program content and your communication. A theme also indicates to attendees what they can expect to feel, learn, or accomplish during the event.
2. **Content:** Do you need a speaker or workshop leader(s)? Will music, skits, drama or special entertainment support your goals? What activities, games, initiatives, etc. will support your goals?
3. **Schedule:** Be aware of over-scheduling your program. Consider your goals in how you schedule. A balanced schedule incorporates
 - a. Helpful content
 - b. Social interaction
 - c. Activity time or recreation
 - d. Free time
 - e. Meals
 - f. Sleep
4. **Aesthetics:** Will décor positively contribute to the overall experience of your attendees? Do you want banners, decorations, etc. to reinforce your theme and make the weekend more immersive for your attendees?

Event Planning – Step 3

Working with speakers and musicians.

1. Understand your event's purpose, goals, and attendees.
2. Recruit speakers and musicians who will connect with and speak to the needs of your attendees.
3. Find speakers through word of mouth, internet, and speaker's bureaus.
4. Always listen to a sample of the speaker and musician prior to scheduling them.
5. Plan 6-12 months or more in advance when booking prominent personalities.
6. Be sure to understand their specific needs and requirements for speaking/performing.
7. Read ALL of the contractual agreements sent to you by speakers and musicians.
8. Treat your speakers and musicians well. Consider their hospitality needs and how to best meet them. Honor them and help make their time refreshing.
9. Obtain speaker topics and outlines ahead of time, if possible. This will build anticipation with your attendees for what they will hear about.
10. Provide ALL of the technical A/V needs speakers and musicians request and plan ample time for testing all of the equipment prior to the start of your program.

Event Planning – Step 4

Working with your site partner.

Take some time to consider the other assets of your chosen conference center's event services staff and how they will support your goals. Below are suggested details to consider and discuss when working with Warm Beach Camp and Conference Center.

1. Take a tour of the facility and discuss your event plans with the Guest Services staff.
2. Review your contract and the event guidelines, recreational options, and common areas available for use.
3. Find out what other groups are on the grounds during your stay and how they may be using common areas.
4. Be sure to convey to the Guest Services staff your goals, expectations, schedule, and general expectations of your group. This will help us to support your group.
5. Be sure to understand and convey needs and details in advance with the Guest Services staff such as:
 - a. Arrival and departure times
 - b. Bedding and linen needs
 - c. Meeting space use, table/chair set-up, audio-visual needs
 - d. Attendance and meal counts, including vegetarian needs
 - e. Meal times
 - f. Menus are available upon request 3 weeks prior to event
 - g. Snack storage space, if applicable
 - h. Decoration guidelines, if applicable
 - i. Free time options
 - j. Recreation options – general and specially scheduled
 - k. Group fire circle needs
 - l. Anything you feel would be important for us to know
6. Clear communication and an understanding of expectations is critical to prepare well for your event.

Event Planning – Step 5

Staffing your event.

Event planning is most effective as a team effort. Your team size depends upon the scale of your event and the complexity of your goals. Here are some staffing positions you may want to have covered:

1. Registration/finance
2. Promotion/communication
3. Snack & beverage
4. Decorations and theme design
5. Sports/games/activities
6. Hospitality for speaker(s) and guests
7. Audio/visual technicians
8. Transportation

Delegate, delegate, delegate. A successful event is one where many people work together in common purpose and have fun doing so. As event planner, your role is more like an orchestra conductor and master communicator. Delegate and keep people connected and in touch with the preparation process. Clearly convey expectations for those you work with and realize that if you don't feel like a broken record at times you're probably not communicating enough. Enjoy the process and be sure to go overboard in saying "thank you." If your team feels encouraged, they will embrace your attendees with joy.

Event Planning – Step 6

Working with volunteers.

Chances are you're a volunteer. If not, you probably have volunteers on your planning team. Remember a few things about working with volunteers:

1. Appreciation is like oxygen. Say "thank you" often and in many different ways.
2. Clear communication and clear expectations are vital.
3. Listen to the input and suggestions of others, especially if they're able to accomplish the idea on their own.
4. If things aren't working out with someone, step in quickly to assess, support, coach, and if necessary out-counsel. Don't let problems fester between people or with poor performance.
5. Put essential communication in writing. Keep everyone connected with regular communication and updates
6. Scope a person's role according to how much time they have to contribute and their past track record in other things.
7. Two is better than one. Spread out work in small teams so that no one person is alone in getting something done.
8. Have fun! Enjoy the journey and be sure everyone feels connected, appreciated, and encouraged.

Event Planning – Step 7

Financial planning and pricing.

While you are probably not doing your event to make money, you still have an obligation to pay the bills and cover the costs. Early in the planning process, determine a program budget.

1. Estimate fixed costs
 - a. Speaker honorariums and travel expenses
 - b. Promotion/advertising
 - c. Postage
 - d. Supplies
 - e. Equipment purchase/rental
 - f. Transportation
 - g. Snack/beverage
 - h. Other
2. Estimate a conservative attendance.
3. Fixed Costs divided by Attendance = per person “fixed cost” part of your price point.
4. Understand cost structure of the site you’re working with.
 - a. Are rates per person?
 - b. What do they include?
5. Generally, a site will provide per person fees and identify additional add-on costs ahead of time. But be sure and ask enough questions and make no assumptions.
6. Add the per person site fee to the per person fixed costs. This is your price point at a break-even number of people. Be conservative in your projected attendance.
7. Consider if this price point is marketable to your attendees. If not, you will need to either commit to higher attendance assumptions thus taking greater risk or lower your fixed costs.
8. It is wise to put a contingency amount of at least 10% into your fixed costs for the inevitable surprise.
9. Scholarship are another option to consider.

Notes about scholarships:

Most events have prospective attendees who cannot afford the full cost of the event. Inevitably, the subject will surface regarding what to do for those who want to come and cannot afford it. Here are some questions to consider when crafting an approach to scholarships or a scholarship policy:

1. Who will qualify?
2. How will they be assessed?
3. Who will process scholarship requests?
4. How much in scholarship will be awarded?
5. How will scholarships be communicated? Will they be promoted or just left on an “as requested” basis?
6. Will people be required to fill out a questionnaire or simply have a discussion with someone.

It is advisable to have scholarship recipients pay something, even a nominal amount. People value what they pay for. Most people can afford something, even if it is \$20.

Scholarship Financing

There are a few options in funding scholarships.

1. Build a scholarship fund into your pricing as a “fixed cost” element.
2. Fundraise for scholarships
3. Build scholarships into the budget of the parent organization

At Warm Beach Camp, our philosophy is that we will charge rates that cover the cost of camps and solicit donations for need-based scholarships. Our desire is that no one is left behind if they want to attend camp. We ask campers to participate at some level. We ask them to appeal to their church and family members for additional funds. We offer scholarships to their local church on a matching basis so that the church and Camp partner together in offering the scholarship. This approach gets everyone involved and strengthens the community around the scholarship recipient.

Event Planning – Step 8

Promotion and marketing.

Everything you’ve done up to this point has an impact on your marketing. You’ve designed a program that meets needs. You’re holding the event at a place people will want to go. You’ve priced it so that people will easily perceive the value. Now you have to communicate in a compelling fashion so that people register and come.

1. Communicate the benefits. Answer the questions, “What’s in it for me?” “Why should I come?”
2. Target your audience with 7-10 points of contact using multiple communication channels
 - a. Brochure/flyer/postcard
 - b. Email
 - c. Social media
 - d. Announcements/recruiting
 - e. Posters/signage
 - f. Video
3. Use the mediums that most readily reach your target audience.
4. You may have to do a “Save the Date” announcement six-eight months prior to the event.
5. Twelve weeks prior to the event, begin your promotional campaign. Increase the frequency of your contacts as you get closer to the event.
6. Most people procrastinate. So, consider offering early registration incentives such as “early bird specials” or giveaways. Be sure any promotional offers or discounts are calculated in your financial planning.

Good planning and execution are critical for marketing success. Build a strong team around this subject area. The ultimate success of your event depends upon two things: Promotion + Planning.

Event Planning – Step 9

Evaluating your event success.

Every good event planner wants to know if they’ve achieved their goals and how to improve for next time. Evaluating your program success is a critical component in the planning process and it begins before the event kicks off.

Things to evaluate:

1. How will you evaluate the goals you set out for the event?
2. Do you want to prepare an evaluation to hand out at the end of the event?
3. Will you prepare an online tool like Survey Monkey?
4. Will you have a debriefing with your group or even just your planning team?
5. Do you want to measure observable changes in your group members over a period of time?
6. Don't make it overly complicated. Any amount of feedback you receive will be helpful.
7. Not only do you want to measure the "customer satisfaction" of your group, but also whether the event met your goals.

Event Planning – Step 10

Saying "thank you."

Finally, plan time and resources to say "thank you" to those who helped make the event a success. Cards, gift cards, and other thank you items do not have to be expensive but people really appreciate receiving some sort of appreciation beyond a quick "thank you" as everything is being put away. For volunteers and paid staff alike, appreciation is like oxygen. Keep it genuine and people will be much more likely to want to help out again.

Conclusion

Entire training programs are devoted to event planning, so these steps are not exhaustive. Many more resources are available online. We hope these tips spark some beneficial ideas and help you further achieve your event's potential.

Last but not least, **have fun!** Planning a camp, conference, or retreat can be stressful. So, find ways to **enjoy the journey**. During the event, you may be busy, but find ways to refresh yourself and relax. You'll be so much more effective if you do.