



Event Design Tips

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Part I: Intentionality

A sense of passion and excitement should drive your event. Before you dive into planning, however, take a step back and assess where that passion comes from and what your intentions really are.

Why are you doing this event?
What difference do you want this event to make? What is your GOAL?
Who is this event for? Why?
What are the direct actions/results you want to achieve by the end of your event? What are the realistic outcomes you can achieve through this event? What are the audience takeaways?
Why are you the one who should be doing this?

Okay, now get out of your own head! Great events are collaborative. Discuss the above with your team or community partners and then dig deeper by addressing the questions on the next page.

Goal & Impact

Does everyone share the same goal?

Are everyone's values aligned and understood?

Can your event realistically create the impact you desire? (Hey, it's *an event*. Be honest with yourself on what can be accomplished in 60 to 90 minutes.)

Audience

List 5 specific traits, values, and/or needs of your audience:

-
-
-
-
-

How do these traits, values, and/or needs influence your event logistics, venue choices, and marketing strategy?

Outcomes/Takeaways

List 1 to 3 outcomes or takeaways you want the audience to leave with at the end of your event:

-
-
-

Design (Think/Feel/Do)

List one thing you want the audience to ...

- Think:
- Feel:
- Do:

How will you design an event that ensures these things happen?

What design elements will help you achieve your outcomes?

Collaboration

Do you have the credibility and/or expertise to accomplish your goal(s) on your own?

Who else in your community can you work with?

If you do not have a relationship with this group, plan time to build an authentic relationship!

PART 2: Event Design

de·sign

də'zīn/

noun

1. Plan or drawing produced to show the look and function or workings of an object before it is built or made.
2. Purpose, planning, or *intention that exists or is thought to exist behind* an action, fact, or material object.

Don't just *plan* an event. *Design* one heavy with intentionality and focused on what the audience needs in order to achieve your goals and outcomes.

Design for your audience, not for yourself.

Your event goal might be noble, but don't fall into the trap of planning an event so focused on what you or your organization wants to achieve that you forget to focus on your audiences' needs. Ask yourself:

- What does my audience value?
- How might time and location affect my audience?
- How do I know this format will appeal to my audience?
- Is my event welcoming? Is it accessible?

Be creative with your format. Fun does not equal frivolous. Smart does not equal dull. Fun & smart programming can and does exist! It just takes some creativity. (Psst! Spirit & Place can help with this!)

Know the flow. Creativity is important in event design and so is thinking through all the details. Put yourself in your audience's shoes and imagine what they will experience from beginning to end.

- Where will people park?
- Do access barriers exist for people with disabilities? With limited income?
- Are sight lines and sound quality good?
- How will people be greeted?
- How will people know where to go and what to do upon arrival?
- How will everyone be made comfortable? (Not only physically, but made to feel welcome?)
- How can people participate during the event?
- How will you encourage and collect feedback?

PART 3: Partnerships & Community Engagement

Memorable and meaningful events are often collaborative. Bringing in different perspectives in the early stages of designing an event can yield fresh approaches and unique format strategies. Always remember collaborative partnerships are built on honesty and authenticity. This takes time and requires open dialogue.

Potential Partners	What are your assumptions about why they'd be a good partner?
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Developing community partnerships requires being a part of your community.

- Read local news sources to find out who is doing what around Central Indiana.
- Sign up for e-newsletters that cover topics outside your work/school/congregational worlds.
- **GO TO EVENTS.** Sounds obvious, but this is the best advice possible.
 - Attend events like yours or sponsored by groups with a similar mission.
 - Attend events *unlike* yours and hosted by groups with a different mission, but similar values.
 - Go to events that attract a diversity of audiences and/or occur in different parts of town.
- Introduce yourself to the event organizers.
- Grab a cup of coffee or lunch and get to know one another on a human level.
- Repeat as needed.

Partnerships are relationships – invest the time!

Community Engagement

Spirit & Place encourages you to incorporate community engagement activities into your event planning.

Community engagement will help you: <ul style="list-style-type: none">• Build trust• Center the voices and experiences of others• Awaken to new & different perspectives• Make real impact	Doing this work well requires you to be: <ul style="list-style-type: none">• People-centered• Adaptable & flexible• Willing to share authority, power, and privilege• Committed to the “long haul”
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What does it mean to be “people-centered?”

Being people-centered requires a shift in perspective from “outreach” (which assumes a centralized source and a target) to “community engagement” (which embraces reciprocal and ongoing relationships that build trust). One way to think of this is that “outreach” is about going out into the community. “Community engagement” goes a step further and invites the community in and asks the question: “How do we build ‘this’ together?” In this model, time is the most critical investment to successfully build effective, collaborative relationships and programs. Being present at crucial community conversations is important, as well as listening without expectation or agenda.

Why is adaptability and flexibility crucial?

All organizations and people have “ways of doing things.” Unfortunately, inflexibility can be harmful. For example, a large institution’s adherence to internally-driven deadlines that don’t honor the rhythms of a community (e.g. setting a youth program’s registration deadline for the first week of school because that’s the start of a new quarter) can cause more harm than good. (e.g., rushed deadlines increase stress for parents and teachers.) When working with – not *for* – communities, flexibility and adaptability are key in building stronger and/or longer-lasting relationships.

Sharing is caring.

Sharing authority supports efforts to strengthen community connections and build capacity. In this outwardly-focused approach, the weaving together of new relationships leads to exciting opportunities for fresh voices to emerge and for new ways of seeing and doing to occur. It may also mean using your (individual or institutional) access to resources and networks to support the work of others, as well as to center and uplift different voices, desires, and approaches.

This all takes time!

People-centered community engagement is a means, not an end. It solidifies links between people, organizations, and the places they call home, but it never becomes a box to check off a “to do” list.

Spirit & Place Festival as a Community Engagement Strategy

Some of our festival partners have used Spirit & Place as an entry point to begin developing new community relationships. Working together to refine an event idea, craft the application, recruit presenters, and share in logistical and promotional tasks can be an effective strategy in building trust and respect.

Spirit & Place urges you to be mindful when doing community engagement work. It takes time to build the needed skills to listen deeply, share authority, and check biases. For some (weirdly fun) reading on how community engagement can be unintentionally harmful, head over to the blog [Nonprofit AF!](#)

Part 4: Keeping Track of Partner Responsibilities

Keep track of who agrees to do what and how partners will be recognized.

Name & Contact Info	Role/Responsibility	Recognition

Contacts & Promises

After identifying and meeting with your collaborative partners, keep a detailed list of who you are working with: names, titles, organizations, email, phone, addresses—even Facebook page names, Twitter handles, and web addresses for cross-promotional purposes.

Agree to and outline how you will recognize your partner's contribution. This step helps with managing expectations and with maintaining a sense of accountability.

PART 5: Budgeting

Plan your budget with intentionality. Budget planning is more than just deciding how much to spend. Thinking through and discussing all possible expenses with your partners will help avoid confusion and misunderstandings later in the process. (Adjust this sheet as needed.)

Expense Category	Est. Expense	Actual Expense	In-Kind Value	Revenue
Venue rental				
AV rental/tech fees				
Custodial fees				
Security				
Speaker/Presenter fees				
Staff time				
Food/Catering				
Promotions (i.e., fliers, posters, Facebook ads, etc.)				
Event supplies (name badges, cups, plates, etc.)				
Registration fee/ticket sales				

PART 6: Accessibility

Consider these basic steps when planning your event. For a more detailed plan, check out The American Bar Association's [Planning Accessible Meetings and Events: A Toolkit](#).

Promotions & Confirmation Materials

Truly accessible events send a welcoming message before the event even occurs.

- Mention ADA compliance of the venue & invite guest to communicate their needs.
- Provide more than one registration/communication option.
- Include instructions and/or maps of entrances, seating options, accessible parking, etc.
- *EXAMPLE:*

We welcome people with disabilities to all Spirit & Place events! Most events are free and located in ADA compliant facilities. For questions about accessibility or to discuss accommodations, contact festival@iupui.edu or 317-274-2455. Please notify us 14 days in advance to request an accommodation.

**Don't bury accessibility info at the bottom of printed materials or web pages.
This sends the message that those with disabilities are an afterthought.**

Venue & Event Accommodation

Physically walk your venue (inside & out) to identify any potential pain points.

- Are sidewalks, ramps, and handicap parking spaces free of obstructions?
- Is there clear directional signage?
- Are walkways well lit?
- Has accessible seating been reserved?
- Are tables at a height accessible to wheelchair users?
- Have you prepared large print (18pt font) versions of printed materials?

Volunteers & Staff

Have conversations with volunteers and staff regarding how they should handle requests for accommodations or otherwise respectfully serve guests with disabilities.

- Always use "person first" language. (i.e., person with a visual impairment, not blind person)
- Make sure volunteers and staff know where all the accessible entrances, seating, and restrooms are located.
- Do not segregate! Let guests know special seating exists, but allow them to sit wherever they choose.
- Offer help. Do not assume they need it and never touch a person without permission.

PART 7: Venue Checklist

Venue Name:

Address:

Contact Name, Email, and Phone:

Parking Notes:

Room/Bldg Notes:

AV & Equipment

Can the venue supply what do you need? If not, who will provide the equipment? _____

- | | |
|--|--|
| <input type="checkbox"/> Laptop | <input type="checkbox"/> Speakers* |
| <input type="checkbox"/> LCD Projector | <input type="checkbox"/> Screen |
| <input type="checkbox"/> Lectern | <input type="checkbox"/> Flip Charts |
| <input type="checkbox"/> Microphone | <input type="checkbox"/> Easels |
| Podium Mic ____ | <input type="checkbox"/> Markers |
| Handheld ____ | <input type="checkbox"/> Sign-In Table |
| Standing Mic ____ | <input type="checkbox"/> Chairs |

Are you showing a video or playing music from a laptop?

Remember speakers so that the audio can be heard.

(You don't want to learn this this hard way! Trust us.)

Room Checklist

Room Set-Up:

- Theater style
- Classroom style
- (Semi) Circle
- U-Shape
- Hollow-Square
- Other:

Will the venue post directional signs? YES NO

If "NO," can you post signs? YES NO

Water for speaker(s): YES NO

Can you bring in your own food? YES NO

Number of Chairs:

What time can you arrive for set-up? _____

Number of Tables:

By what time you need to be out? _____

Sign-In Table: YES NO

Location:

PART 8: Presenter/Moderator Checklist

<p>Name:</p> <p>Email:</p> <p>Phone:</p> <p>Address:</p> <p>Topic:</p> <p>Requested Length of Presentation:</p> <p>Presentation Title:</p> <p>Bio:</p> <p>Presentation Summary (3—5 sentences):</p> <p>Meal: YES NO (restrictions?)</p>	<p>Travel Reimbursement Amount:</p> <p>Honoraria Amount:</p> <p>AV Needs:</p> <ul style="list-style-type: none"><input type="checkbox"/> Laptop<input type="checkbox"/> LCD Projector<input type="checkbox"/> Microphone<input type="checkbox"/> Speakers<input type="checkbox"/> Screen <p>Arrival Time:</p> <p>Departure Time:</p> <div style="border: 2px solid red; padding: 10px; margin-top: 20px;"><p style="text-align: center;">Why this speaker?</p><p>You asked this person to speak for a reason, but do they know why? Have you discussed ...</p><ul style="list-style-type: none">• Why this event is happening?• What the event goals are?• What the audience outcomes or takeaway message should be?• Your design plans and event format?• What you hope their specific remarks will address, reinforce, or inspire?<p style="text-align: center;">Never assume an “expert” will automatically know what to do or will accomplish your event goals without some coaching.</p></div>
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PART 9: Promotions – Overview

Creating a publicity strategy for your event is crucial. Factor publicity into your overall effort and make it a part of everything you do to increase visibility and community impact.

ESSENTIALS:

- Update website home page and/or events calendar.
- Promote the event on social media.
- Send e-mail invitations to your supporters and friends.
- Include event information in your (electronic) newsletters.
- Draft a press release.
- Outline with event partners the specific ways they will help promote the event. (Use the PR Matrix!)
- Include your event in (online) community calendars.
- Upload post-event photos on social media and your website.

SOCIAL MEDIA TIPS:

- Use Hootsuite to pre-populate Facebook and Twitter posts
 - Create at least one post a week for the 4 to 6 weeks leading up to your event
- Tag your event partners in your social media posts to increase exposure
- Ask your presenter for images or articles to link to

EMAIL INVITATIONS & REMINDERS:

- 6 weeks—“Save the date” & general topic info
- 2—3weeks—Feature your speaker (or film, book, etc.) in more detail
- 3—5 days—Share your enthusiasm for the upcoming event
- Day before—Remind everyone they are welcome to attend
 - Always encourage people to bring a friend
 - Draft these emails early, save them in a folder, and send when ready

PRESS RELEASES:

- Send 2—3 weeks in advance

PR Matrix

	Website Who is willing to post online & where? Homepage? Event calendar?	Social Media Who can promote on social media and how?	E-news Who can include info in their e-news? When is content needed to make deadlines?	Internal communications Will partners use staff (or faculty) lists to spread the word?	Targeted Lists Do you or your partners have targeted lists you can use? (Prospective members, community contacts...)	Communication Who can write a press release and send it out? What about media alerts? Are there (online) community calendars someone can populate?	Graphic Design Do any partners have a designer on staff who can create a flier?	Print Do any partners have the capability to print and/or distribute materials such as fliers or programs?	Personal Contacts Partners should make a list they will extend personal invitations to.	Event Presence* Who can be at the event to take photos, live Tweet, etc.?
Lead Partner										
Collaborating Partners										
Allies										

Social Media Guidelines

- Never say anything online that you wouldn't mind seeing on the front page of the paper the next morning.
- Keep posts positive. For example, instead of saying, "We haven't sold all of our seats for Event X yet," say "It's not too late to join us at Event X!"
- Backlink (i.e., direct people) to your website to read the full details rather cramming it all into one post.
- Don't post anything that isn't 100% confirmed. For example, if you think a speaker is presenting but the contract hasn't yet been signed, wait until the booking is official before announcing it.
- Direct messages are private, but remember that they can be forwarded to others. Treat a direct or private message on social media as public information. Don't say anything you wouldn't post publicly.
- Engage others in conversation. Ask questions that get people talking such as, "What are you most looking forward to about Event X?"
- Be conversational and engaging. Don't speak in "official" language. Have fun!

Be Conversational & Engaging

Social media is all about conversation. Use a conversational tone and ask questions that inspire people to talk to you. Make sure to listen to your followers and provide ample information and/or hyperlinks to your event.

Twitter 101

Twitter is a micro-blogging social media tool that allows its users to communicate in 140 characters or less.

Twitter Glossary

@username: A username (aka, your **handle**) is how you're identified on Twitter and is always preceded immediately by the @ symbol. (There is no space between the @ symbol and the username.)

Example: @spiritandplace is Spirit & Place's username

@

The @ sign is used to call out (tag) usernames in Tweets. If you use it in a Tweet (Hello @spiritandplace!) that user will see it.

Follow: Subscribing to a Twitter account is called "following." To start following, click the Follow button next to the user name or on their profile page to see their Tweets as soon as they post something new.

Followers: Other Twitter users who have followed you to receive your Tweets in their Home stream.

Hashtag: A hashtag is any word or phrase immediately preceded by the # symbol. When you click on a hashtag, you'll see other Tweets containing the same keyword or topic. Use Spirit & Place's hashtag and create one for your event as well.

Example: Spirit & Place's hashtag is #SPIndy.

Home: Home is your real-time stream of Tweets from those you follow.

Reply: A response to another user's Tweet that begins with the @username of the person you're replying to is known as a reply. Reply by clicking the "reply" button next to the Tweet you'd like to respond to.

Retweet: This is when you share another user's tweet by giving them credit for it by clicking the Retweet button.

Adapted from Twitter's Help Center Glossary
<https://support.twitter.com/articles/166337>

Twitter Tips

- It's okay to shorten words and to be informal.
- Make it personal.
- Ask your followers questions.
- Follow people back unless they are obvious spam accounts or aren't related to your audience.
- Engage in the conversation—respond to other people and re-tweet posts that are noteworthy.
- Use bit.ly to shorten long links that take up too much space.
- Use images.

Developed by Bohlsen Group

Social Media Messages

Basic Tweet

Excited to be working with @spiritandplace on (NAME OF EVENT)! Join us at the festival DATE, TIME, LOCATION. #SPIndy

Basic Facebook Post

We're very excited to be working with @SpiritandPlace on (NAME OF EVENT)! Join us at the festival DATE, TIME, LOCATION. RSVP today: www.spiritandplace.org

Advanced Tweets/Facebooks Posts

Have some fun your social media posts! Remember to tag usernames if you can or provide web links.

Twitter Ideas	Facebook Ideas
<p>(SOME WORDS OF WISDOM) #SPIndy</p> <p><i>Was something profound or interesting shared during a planning meeting? Share it!</i></p>	<p><i>Give a sneak peek at what you're planning by sharing a photo or writing a teaser.</i></p>
<p>(QUESTION?) #SPIndy</p> <p><i>What are some of the questions your event is wrestling with? Engage your audience now with these questions.</i></p>	<p><i>Ask your friends what they think about QUESTION.</i></p>
<p>(CAPTION THIS!) #SPIndy</p> <p><i>Use a fun image for people to engage with.</i></p>	<p><i>Link to an article or interview related to your event. Ask your readers what they think.</i></p>
<p>(DID YOU KNOW ... FACT, STAT, TIDBIT?) #SPIndy</p> <p><i>Share something interesting about your event, your organization, or event partner.</i></p>	<p><i>Showcase your volunteers and/or staff in a photo, quote, or "did you know" fact.</i></p>
<p>Use a format above to write a Tweet:</p>	<p>Use an idea above to write a Facebook post:</p>

PART 10: Do's, Don'ts, and Pro Tips

Do's

- Use your imagination and create opportunities for the audience to use their imaginations too.
- Encourage diverse input during the design phase of your event.
- Think about how time of day, event length, location, or technical components impact actual and perceived levels of accessibility.
- Incorporate adaptable physicality and/or audience interaction into your event.
- Test the space. Does the AV work? Can the audience see everything?

Don'ts

- Use a text-driven PowerPoint and read to your audience.
- Assume your audience knows less than you.
- Lecture or talk *at* your audience; talk *with* them.
- Skimp on how much time it takes to build rapport and trust with event partners, speakers, or audiences.
- Keep doing the same thing expecting different results.

Pro Tips

❖ **The Moderator or, “Ten Thoughts I Thunked” by Kevin Armstrong**

Longtime Spirit & Place *Public Conversation* moderator created this top ten list to help you plan a well-moderator discussion.

- 1. The moderator's principal role is to allow each panelist to be his or her best self.**
- 2. If at all possible, talk individually with the panelists before the event and talk together with the group for at least an hour before the presentation.** I usually provide the first question to the panelists before the event so they can hear one another's answers and get a feel for one another's tone and perspective.
- 3. Avoid formal introductions.** A printed program may already provide a biographical sketch. And even in the absence of printed material, take no more than 90 seconds to introduce the panelists. The audience has come to hear from the participants, not about them.
- 4. Stand up for the audience and involve them.** If there is a Q & A period, remind the audience to ask questions rather than make speeches. Somewhere between 25–30% of the conversation should involve the audience. Anymore and they run out of good questions. Any less and they feel sidelined. If the audience can't hear the question, repeat it. If the audience or panelists don't understand the question, rephrase it.

5. **Be neutral and objective.** It's important to be provocative but if you have a dog in the fight, you should be on the panel.
6. **Be informed and prepared.** You should have a general understanding of the subject in order to create a logical flow to the conversation. Have a set of possible questions, quotes, and conversation starters. Good answers generally arise from good questions. Then, be prepared to abandon them all if the conversation takes an interesting turn.
7. **Ask the question everyone has on his or her mind but is not asking.** If a panelist has been in the news, or is notable for a particular belief or practice, get it out on the table early so you can move on.
8. **Once you've asked a question, look at the audience and look at the other panelists.** The panelist shouldn't be talking to you but to the audience and to any other panelists.
9. **Be attentive to three things at once:** The conversation that is going on. Where the panelists seem to be taking the conversation. How the audience is responding.
10. **Say Thank you.** To the panelists. To the audience. To your sponsors.

❖ **Additional Tips from Spirit & Place**

- **Let your audience know what the event goals are.** Establish expectations early.
- **If the topic is contentious, establish hopes & expectations for group involvement.** Reinforce for the speakers and audience members the importance of respectful disagreement.
- **Prepare cutoff phrases ahead of time.** Example: If a panelist isn't giving enough time for others to speak, you can say, "You have a great point there, but I think we need to hear from ____ now." Or, when they take a breath, interject with, "Thank you for that perspective. I'm curious to hear what ____ might think."
- **Good follow-up questions are open-ended and can be used to ...**
 - *Add clarification:* What did you mean by that? Could you elaborate? Can you give an example?
 - *Bring in new perspectives:* X brings up an interesting point. What do the rest of you think?
 - *Bridge connections between ideas:* John said X and Mary said Y. Do their ideas have anything in common?
 - *Dig deeper:* Let's explore that from another angle. Can you unpack that point a little more? I'm fascinated by that concept you just brought up, do you want to dig into it a bit more?
- **Close with a call to action.** Challenge your audience to stay engaged and to learn more.

PART 11: Event Planning Timeline (not Spirit & Place Festival specific)

6 weeks to 6 months prior to the event

Initial planning is largely determined by your capacity and the event in which you are coordinating. For the Spirit & Place Festival, initial event planning should begin at least 1—2 months prior to the application deadline so that you have time to line up partners and craft a strong application.

- Determine size and scope of your event, including who is responsible for what.
- Determine your audience—design your event with them in mind.
- Reserve a venue.
- Contact speakers to determine availability and to clearly and precisely articulate your needs and goals for the event. (Remember to discuss details such as the time, date, and venue as well as any AV requirements or other related fees.)
- Determine the event budget.
- Identify a collaborating partner (i.e., a group with shared values/complementary interests) who can assist with event design, content development, promotions, and/or some other need.)
- Establish a publicity plan for the event. (What will you do, who will do it, and when?)
- Send “save the date” announcements to engage people early.

2—6 weeks prior to the event

Among other activities listed below, this is when you should begin heavy promotional activity. In the interim, promote your event through blog posts, social media, and other means.

- Update your web site & ask your partners to do the same.
- Increase social media messaging.
- Create/make use of an RSVP system.
- Distribute printed promotional materials. (Take fliers or other collateral to coffee shops, post on congregational bulletin boards, ask to leave materials at your public library, etc.)
- Send a reminder email to people and encourage them to bring a friend.
- Send out a press release. (Long lead publications such as *Indianapolis Monthly* require a 3 month lead.)
- Populate online community calendars with event information.
- Meet with all involved event staff to confirm logistics.
- Finalize catering arrangements, if necessary.
- Begin recruiting volunteers.

3—5 days prior to the event

- Finalize/confirm number of attendees with the venue and review room set-up and AV plans.
- Finalize/confirm any catering needs.
- Finalize/confirm any and all housekeeping requests.

- Finalize your volunteer plan. (i.e., prepare instructions and assign someone to greet the volunteers.)
- Finalize welcome/introductory remarks. Remember to acknowledge Spirit & Place and other partners.
- Purchase food, drinks, ice, tablecloths, and utensils, etc. if needed
- Create name badges, if needed.
- Print any needed handouts and don't forget to print a sign-in sheet!
- Send a final email confirmation, with any special event instructions, to attendees who have RSVP'd. (If not sold out, encourage attendees to bring a friend.)
- Send final confirmation email to the guest speaker reviewing arrival time, parking, room number, etc.

Day of the event

- Arrive early to check room to make sure it is clean and set-up properly.
- Test the AV.
- Meet caterer or set out refreshments.
- Prepare water for your speakers.
- Greet your volunteers and explain their role.
- Setup name tags, sign-in area, and/or distribute programs or agendas.
- Welcome attendees and guest speakers.

Post-event

- Collect evaluations.
- Send thank-you notes to speakers, collaborative partners, and volunteers.
- Summarize evaluations within two weeks and share the information with your team.
- Discuss and document possible improvements related to the event design, format, content, and process with your team.
- Compile a list of all expenses incurred for the event, including estimates on staff time. (You can use this information to help you estimate expenses – or write a grant – for a future event.)