Planning an event

Any event should be inclusive and respectful to everyone. It should also be accessible, both in terms of venue and content.

We recommend that you have a few others to help when planning an event to support each other and divide up the work. It’s a good idea to divide and outline the responsibilities so everyone knows their role in delivering the event.

Use this template to gather your thoughts on your event, we’ve used the 4-W’s – what, where who, and when. Don’t forget to record your reflections at the end so you can use this as evidence in your CPD portfolio.

What…

What type of event are you considering? Here are some ideas to help you plan your event.

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| Event type | Definition |
| Presentation or short talk | Part of a wider programme and event, where you have an amount of time to fill, for example 15, 20 or 30 minutes and a topic to talk about. |
| One-off webinar | Two hours or less and held online. Should have an educational element to the session which can either be delivery of information or with interactive activities. Can be pre-recorded or live. |
| Webinar series | See the description for webinar, but as a series of webinars relating to the same topic. |
| Workshop | Can be delivered live, online, in person or hybrid. Supports learning in groups, with interactive activities embedded. |
| Learning activity | Can be self-directed learning or delivered to a group. Available to access anytime and will usually take 1-2 hours to complete. If being delivered to a group, can be held in person, online or hybrid. |
| Short course | Can be self-directed learning or delivered to a group. Available to access anytime and will usually take 2+ hours to complete. If being delivered to a group, can be held in person, online or hybrid. |
| Journal clubs | Meet with colleagues to discuss and critically appraise a research paper, then think about the implications to your practice or area or work. Can be held online, in person or hybrid. |
| Networking | Often based around a social activity, or lots of time given to sociable elements. Can be held in person, online or hybrid. |
| Virtual cafes | Usually 1 hour. Provides an online space for you to connect with other members with a shared or common interest. |
| Reflection tools | Designed to support members to record reflections, new knowledge and learning, as well as how members plan to apply their learning to their work. A range of formats to suit different methods of reflecting and preferences. |
| Conference | Usually a full day, formal event with a set programme including keynote speakers, presenters and workshops or discussion panels. Can be held in person, online or hybrid. |
| Social | A social event where members can come together. |

Some things to consider:

* Have you looked at the learning standards when deciding your topic or theme? What will your topic be? Is your topic inclusive for everyone?
* What do you want attendees to take away from attending this event?
* Think about how you can make your event accessible and inclusive. Look at cvent’s ‘[5 steps to planning accessible events](https://www.cvent.com/uk/blog/events/accessible-events-tips-and-best-practices)’ page or Hire Space’s ‘[eight top tips for planning inclusive events](https://hirespace.com/blog/tips-for-inclusive-events-accessibility-guide)’ for some ideas.

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| Write down your thoughts on what type of event you would like to host and what your topic could be. |
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Think about the format of your event; how long will it be and how will you deliver your event. Consider presentations, workshops, breakout rooms, etc.

Think about how you can make this accessible to others if the need arises (for example, making slides available early, restricting use of acronyms, using [plain English](https://www.plainenglish.co.uk/how-to-write-in-plain-english.html) etc).

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| Write down your thoughts on the format of the event. |
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Where…

If you are able to, you might have access to a venue free of charge or be able to secure funding to have it hosted somewhere. If not, you’ll need to consider a virtual event. Check that you have access to a platform to host a virtual event.

Think about your event and note the pros and cons of hosting a virtual and in person event. Make sure you include your thinking on accessibility and inclusion for both options. You can look at cvent’s ‘[5 steps to planning accessible events](https://www.cvent.com/uk/blog/events/accessible-events-tips-and-best-practices)’ page or Hire Space’s [eight top tips for planning inclusive events](https://hirespace.com/blog/tips-for-inclusive-events-accessibility-guide) to see if your event is fully inclusive.

Pros and cons of a virtual event:

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| Pros | Cons |
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Pros and cons of an in person event:

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| Pros | Cons |
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You’ve thought out the pros and cons of having the event virtually verses having it in person. You will also need to consider if the topic and format you were thinking of in the ‘what’ section is better delivered at an in person or virtual event, for example is it a presentation style event or have you included workshops?

If you decide on an in person event, think about deadlines for confirmation of numbers or when a decision is needed to cancel or postpone the event. Make a note of these dates below so you have them to reference. Think about what you will need for your event and what the venue can offer. Make sure to ask about their ability to provide flipcharts, parking, catering, breakout rooms, AV equipment and tech support. Remember to check your funding if you’ve been able to secure it.

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| Use this space to write down a list of potential venues and costs with any specific cancellation requirements. You should include any catering costs if you will be offering catering at your event. | | | | | |
| **Venue (include key dates for confirmation of delegates and cancel/ postpone deadlines)** | **Capacity (think about room layout and what suits your event)** | **AV and tech support – is this included?** | **Other requirements (for example, breakout rooms, registration space)** | **Public transport and/or parking availability** | **Catering cost** |
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If you’re hosting a virtual event, think about where you could source a platform and what support might be available to you when using it. Its an idea to have a backup plan in case of any technology issues that might arise.

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| Virtual event option | |
| **Platform available** | **Supported by** |
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| Use this space to write down your plans and what considerations you had to make sure your event is accessible and inclusive to everyone. |
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| Use this space to write down anything else that you have considered when planning this event. |
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Who…

When planning your event, you need to consider who will be attending. Who is your target audience?

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| Who will you want to invite to attend your event? |
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Once you’ve decided who can attend, you need to think about a minimum and maximum number of attendees. How will you advertise your event to reach the right audience or are you going to send invitations to particular people.

If your event is in person, how many attendees can the room hold? Remember to add those helping you to organise the event in your overall numbers. Think about the room layout as this will change the delegate numbers.

If its virtual, it’s easier to manage a larger number but consider the nature of your event. If you’re planning a discussion based event, you’ll have to consider how to facilitate discussions or keep the attendance at a lower level to allow discussion in the main part of the meeting. If it’s a presentation style webinar where questions can be put in the chat, check the limitations of your platform.

You should also consider minimum numbers, especially for in person events so you can keep track of registrations or RSVPs. Be aware that you may need to consider cancelling or postponing your event if the need arises.

Is there a deadline in the venue or catering contract for cancellation or postponement?

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| What is your maximum capacity (including committee members) for your event?  What is the minimum number you’ll need before going ahead with your event? |
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When…

Have a think about when you’re likely to get the best attendance at your event. Is this something that others could attend during work hours or would it be better suited to an evening or weekend? Check with others to see if there is anything happening that could affect attendance at your event.

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| Write down your thoughts on when to hold your event – are there any factors that could influence your decision? |
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Decisions

Make a note here of what decisions you have made about your event.

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| What will the topic or theme of your event be? |
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| Who will attend your event? |
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| When will you hold your event? |
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| Where will you hold your event? |
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| Ideas for the format of the day. |
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Supporting documents

* [EDB Strategy - RCOT](https://www.rcot.co.uk/node/7253)

Checklist

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|  | Have you decided… |
|  | What type of event you will host? |
|  | Who the event will be open to? Will you advertise it or have an invitation list? |
|  | If your event will be in person or virtual? |
|  | When your event will be held? |
|  | Have you considered accessibility and inclusion throughout your planning? |
|  | Have you thought about a topic that is inclusive? |

Time for reflection

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| Use this space to record your reflections on the first step of planning your event. How have you found this, and would you do anything differently for your next event? This counts as a CPD activity – remember record what you’ve learned in your CPD portfolio as you go along. |
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