



Spirit & Place Festival

New connections. New directions.

Event Planning and Promotions How-To

Overview

Designing, promoting, and implementing successful event—and building collaborations around events!—takes a lot of planning and effort. Spirit & Place has created a series of timelines, checklists, question prompts, and guidelines to help you with everything from identifying your audience to moderating a panel discussion. Don't be overwhelmed by all this! Just focus on the parts most relevant to you and **CONTACT US** if you ever need any assistance.

Good luck planning your Spirit & Place Festival event!

PART 1

Event Planning Timeline

A useful timeline for the Spirit & Place Festival and beyond.

PART 2

Audience & Achievements

We strongly suggest you ask yourself these essential questions.

PART 2

Event Design

PART 4

Partnerships & Partner Responsibilities

PART 5

Budget Planning

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- a. Promotions Overview
- b. Social Media Guidelines
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PART 9

Do's, Don'ts, and Pro Tips

PART 1: Event Planning Timeline

We tried to draft a timeline that would be relevant to not only the Spirit & Place Festival, but other events you might be working on. Use it as a general guideline to think about how far in advance you need to plan for a successful event.

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—4 weeks prior to the event

On top of any promotional activities planned by Spirit & Place, it is CRUCIAL you begin heavily promoting your event no later than this point. In the time between initial planning and heavy promoting, you should still be looking for ways to 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

Spirit & Place volunteers will arrive 45 to 60 minutes early and are there to greet guests, hand out Event Guides, and distribute and collect of event evaluations.

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

Post-event

**Spirit & Place will summarize all the festival event evaluation and will supply a report at the first of the year at the latest.*

- Thank speakers, collaborative partners, and volunteers.
- Summarize evaluations.*
- Discuss and document possible improvements related to the event design, format, content, and process with your collaborators (and/or Spirit & Place staff).
- Compile a list of all expenses incurred for the event, including estimates on staff time.

PART 2: Audience & Achievements

Before planning any event, know why you're planning it and who you are planning it for.

1. Why are you doing this?

What I want to give . . .	What I want to get . . .

2. Who is your audience?

Focus on the characteristics of your audience to move beyond generalities (i.e., people who like cultural/artistic/civic events). Specific details will help you design and promote your event.

List 5 specific traits of the audience you want:

-
-
-
-
-

3. What is the thing you most want to achieve with this event? What's the outcome of all this?

PART 3: Event Design

Successful events are designed at both 30,000 feet and on the ground. Big vision must meet practical logistics.

Design for your audience, not for yourself.

You have event goals and that's great! 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 what your audience 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?

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 planning but so is thinking through all the details. Put yourself in your audience's shoes and imagine what they will see, think, feel, and do from beginning to end.

- Where will people park?
- How will people be greeted or asked to check-in?
- How will people know what to do upon arrival?
- How can people participate during the event?
- How will you encourage and collect feedback?

During this event, the audience will . . .

THINK	FEEL	DO

PART 4: Partnerships

Collaborative partnerships are built on honesty and authenticity. This takes time and requires open dialogue.

What do you need?	What can you offer?

Potential Partner	What are your assumptions about why they'd be a good partner?

Identifying Partners

- Go to events that attract a diversity of audiences and/or occur in different parts of town.
- Introduce yourself to the event organizers.
- Sign up for e-newsletters that cover topics outside your work/school/congregational worlds.
- Talk to your neighbors! (Do this anyway, but you never know who your neighbors know...)
- Read local news sources to find out who is doing what around Indy.
- Reach out to your potential partner by asking for a face-to-face meeting.

Partnerships are relationships – invest the time!

PART 4: Partner Responsibilities

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

Name & Contact Info	Role/Responsibility	Recognition

Partner Contacts & Promises

After you have identified and met 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. Failing to properly recognize and thank event partners could damage future collaborative possibilities.

PART 5: Budget Planning

Adjust this sheet as needed, but 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 you avoid confusion and misunderstandings later in the process.

Expense Category	Est. Expense	Actual Expense	In-Kind Value	Revenue
Venue rental				
AV rental/tech fees				
Custodial fees				
Security				
Speaker 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: Venue Checklist

Venue Name:

Address:

Contact Name, Email, and Phone:

Parking Notes:

Room/Bldg Notes:

AV & Equipment

Can venue supply what do you need?

- | | |
|--|--|
| <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 it can be heard.

Room Checklist

Room Set-Up:

- Theater style
- Classroom style
- 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 7: Speaker Info

Speaker Name:	Meal: YES NO (restrictions?)
Email:	Travel Reimbursement Amount:
Phone:	Honoraria Amount:
Address:	AV Needs:
Topic:	<input type="checkbox"/> Laptop
Requested Length of Presentation:	<input type="checkbox"/> LCD Projector
Presentation Title:	<input type="checkbox"/> Microphone
Speaker Bio:	<input type="checkbox"/> Speakers
Presentation Summary (3—5 sentences):	<input type="checkbox"/> Screen
	Arrival Time:
	Is your speaker staying for the whole event or does he/she need to leave early?
	<div style="border: 2px solid red; padding: 10px;"><p style="text-align: center;">Why this speaker?</p><p>You asked this person to speak for a reason, but do they know why? Make sure your speaker:</p><ul style="list-style-type: none">• Knows the goals for your event.• Has a clear understanding of what Spirit & Place is.• Understands the importance of connecting their remarks to the festival theme.</div>

PART 8a: 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.
- If you have an event partner, outline the specific ways they will help promote the event.
- 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—3 weeks—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
- Follow up the day before with a reminder about the event

Spirit & Place Specifics

Do all of the above for festival and non-festival events. Specific to Spirit & Place though . . .

- "Like" Spirit & Place on Facebook and follow us on Twitter at @spiritandplace.
- Use the hashtag #SPIndy.
- Link to the Spirit & Place website at spiritandplace.org.
- Subscribe to the Spirit & Place blog and WRITE something for it!
- Distribute the newsprint event calendar beginning in October.
- Use the official festival Event Guide at your event.

PART 8b: 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 the Sprit & Place 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 backlinks to your event.

PART 8c: 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

- You only have 140 characters. 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

PART 8d: 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 9: 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 creation phase of your event.
- Think about how time of day, event length, location, or technical components impact actual and perceived levels of accessibility.
- Incorporate 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 goals of the event are.**
- **If the topic is contentious, establish ground rules.** 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.