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SOCIETY
OF
PHYSIOTHERAPY

**THINK
PHYSIO**
act local

EVENT TOOLKIT





**WHEN
THEY ARE
ORGANISED
WELL
EVENTS
ARE A
POWERFUL
TOOL.**

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Introduction

When they are organised well events are a powerful tool. They are a key communication channel, can create networking opportunities, bring people together and help create a bond and provide a platform for sharing best practice. This toolkit has been designed to assist you in designing and organising successful events. It outlines the main considerations that should be undertaken when organising an event and has been developed to support local initiatives, give advice to other CSP members and improve your ability to influence decision-makers and enhance the reputation of the physiotherapy profession.



**EVENTS
ARE A KEY
COMMUNICATION
CHANNEL,
NETWORKING
OPPORTUNITIES,
BRING PEOPLE
TOGETHER
SHARING
PRACTICE.**

Getting the basics right

The role of the event manager

Every event requires a designated manager who has overall responsibility for arrangements. This person must be ready to make decisions and possess other crucial skills including forward planning, delegation, the ability to be able to communicate plans, time management, a close attention to detail and the ability to troubleshoot issues and find solutions to problems as they arise.

Teamwork is key when organising a successful event. The event manager cannot take on all tasks and delegation is vital. Before planning commences the event manager should think through their team members' skillsets and availability and distribute specific tasks so that different individuals are also responsible. Communicate these tasks clearly with expected timescales and share these details with all members of the team so that there is no room for misunderstanding. Once tasks have been delegated it's vital that all team members communicate with one another and keep each other up to date with progress and any issues.

There are many ways to do this and a face to face meeting isn't always necessary if distance is an issue. Look into the possibility of organising a conference call or use an online facility like Facetime, Skype or Webex.



**TEAMWORK
IS KEY WHEN
ORGANISING
A SUCCESSFUL
EVENT.**

Essentials checklist

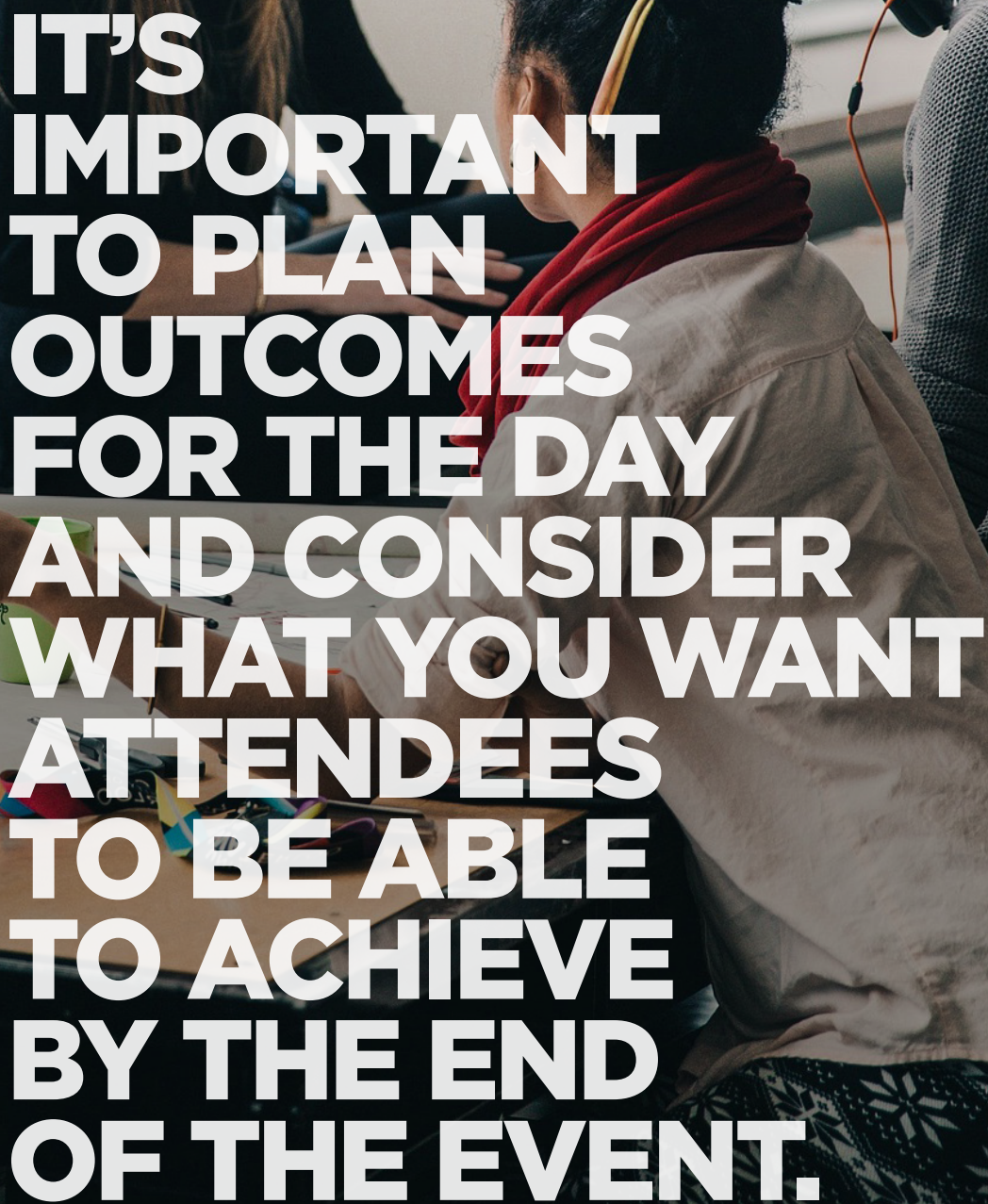
When starting to plan an event consider the answers to the following questions:

Key Question	Considerations	Answer
What is your objective?	What are you trying to achieve by holding an event? Is an event the best way to achieve this goal? What is your aim for the day? What outcomes do you hope to achieve? How does your event link to the CSP corporate strategy?	
Who are your audience?	Media, members, businesses, local stakeholders and decision makers?	
When is the best time to hold your event?	Consider the date and time vs your audience's requirements. A lot of physios require at least six weeks' notice to move appointments in order to attend an event. This must be considered. Check the date so that it doesn't clash with public holidays, religious festivals and other events. Check the availability of vital personnel, keynote speakers and any other essential participants. It's a good idea to have two possible dates before you meet with the venue manager.	

Essentials checklist

When starting to plan an event consider the answers to the following questions:

Key Question	Considerations	Answer
Where can you hold your event?	It's essential to find an appropriate venue that is easy to travel to, has the facilities you require and is within your event budget. More on this on page 20.	
How long will your event last?	Consider that a lengthy event could involve managing catering requirements which will impact on the cost. What's a reasonable length of time for an event after work or at a weekend? How long will it take delegates to travel to the venue?	
How much will the event cost?	Draft a projected budget considering all expenditure and ensure that you have enough budget to cover everything plus contingency.	
Are you going to charge a ticket fee?	Can you afford to hold the event without charging a fee? If you do charge a fee how much would be a barrier to attendance? Would you charge different members different rates? How many attendees do you need to attend to break even?	



**IT'S
IMPORTANT
TO PLAN
OUTCOMES
FOR THE DAY
AND CONSIDER
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ATTENDEES
TO BE ABLE
TO ACHIEVE
BY THE END
OF THE EVENT.**

Pre-event planning

Programming the event

A carefully crafted running schedule can make or break an event. Timing is very important. Consider starting the event with informal networking over refreshments. Position hosts from your team ready to make conversation with guests, make introductions and help delegates feel at ease.

When planning the agenda consider comfort breaks and endeavour to make the event interactive. No one likes being talked at all day! The human attention span is shorter than you might think. As a rule, try not to have one agenda item that is more than about 40 minutes. Interactive seminars/breakout sessions with feedback help delegates feel that they have contributed and help inform your outcomes too.

Seven steps to programming a good event:

1 Choose a theme – for an event to be coherent it should have an overall theme. That theme should include a short summary to specifically outline what it is and what it isn't. Overly broad themes such as 'research' or 'health and wellbeing' are too broad and won't aid your event planning. It's important to plan outcomes for the day to consider what you want attendees to be able to do or understand by the end of the event.

2 Think about the structure of the day – avoid concurrent lecture style sessions. Think about opportunities for a workshop or debate at points in the day. It may begin with a lecture, but then (to keep people involved) should move to a different style of session.



**THE HUMAN
ATTENTION
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3 Decide content based on the ‘story’ of the day. Where possible, you want the day to flow in a logical way with content to match your plans. Leaping between topics without a clear link can appear chaotic and may dissuade attendees from returning in the future.

4 Once you know what you want discussed THEN plan the speakers. Feel free to ask around outside of your core team for speaker suggestions related to specific topics. Look online. Social media is a good source of speakers.

5 Be prepared to provide possible speakers with a brief about what you want them to talk about when you make your request. They will always be grateful for it and will dislike ‘speak about whatever you like’ or overly general instructions. In some instances, you may be asked by a speaker if they can discuss a particular topic. That can work if they frame it within the theme for the day but generally providing a brief will prevent surprises including repetition of topics and mismatched content. Also, speakers will be able to tell whether they can cover the topic you need and if not, often signpost you to a suitable alternative.

6 If you book a high profile speaker, ALWAYS have a contingency plan in place. Many speakers in prominent positions can be subject to urgent last minute changes to their schedule. To avoid disappointment, be prepared!

7 Be known for excellent content not occasionally high profile speakers. The former is in the control of the organisers and sustainable, the latter is neither.

Host/Speakers

Who is going to host your event? A well briefed host is key to binding an event together, introducing speakers and handling Q&As. Consider your speakers’ and host’s requirements during the event. Do they want a dressing room? Arrange for them to have water available while they are speaking and introduce the host and all speakers pre-event so they have the chance to discuss the event and how their interactions will work.



**A WELL
BRIEFED
HOST IS KEY
TO BINDING AN
EVENT TOGETHER,
INTRODUCING
SPEAKERS AND
HANDLING Q&A'S**

Write a briefing for your host and each speaker and share it with them pre-event. In your pre-event briefing include details of the agenda, the audience profile, and technical set-up. You may want to consider a script for your host and discuss this option with them. It is essential that you write a housekeeping script for the host and in it they must communicate evacuation procedures and it helps if they remind delegates to switch mobile devices off.

Risk Management

As already mentioned it's important that housekeeping is addressed at the start of your event by the host. Speak to the venue pre-event about evacuation routes and fire drills and ensure that this information is shared with all event delegates.

It's likely that the venue will require you to carry out a risk assessment of your event. The HSE offer a lot of advice on this and you might find that a member of your team is experienced in producing risk assessments and could take on this task.

Speak to your venue manager about medical cover and first aid provision. They could provide this through their personnel or might expect you to provide a first aider for your delegates.

Invitations and promotion

You should consider using an online ticketing system like Eventbrite to manage the event registration and ticket distribution. Eventbrite is free to use if your event is free of charge and each event can be set up independently so that the information you require is captured.

Alternatively, if you are inviting delegates from a guest list then you should consider carefully drafting an email or hard copy invitation that fully explains the purpose of the event. Consider who your invitation will be from. This can help attract delegates and easily add kudos.

**SPEAK TO
THE VENUE
PRE-EVENT
ABOUT
EVACUATION
ROUTES AND
FIRE DRILLS.**



Ensure that you include:

- RSVP deadline (choose a date which gives you a reasonable amount of time to chase people up) A named person to reply to with their contact details
- Venue, date and time of the event
- Ask people to declare any dietary and accessibility requirements when RSVPing
- It's helpful to include a map of the venue and details about public transport and parking

Whatever method you use do not forget to sell the event by pulling out factors that make it sound appealing and desirable to attend when writing your description.

The Campaigns and Regional Engagement Team can be contacted via email at **cre@csp.org.uk** and can help promote your event to members in your region via the following channels:

- In *Frontline*
- On the regional iCSP news and events pages
- Via a broadcast email message to members in your region
- By sending information to other professional networks, retired groups, students and associates
- The CSP's Print on Demand system is a great tool: you can customise our professionally designed posters and leaflets with your own details to promote your event. A limited quantity are then printed and posted to you totally free.

It's vital that the core members of your team promote the event via their own professional networks too.

Delegate management

Once you have issued your invitations and RSVPs start to arrive create a master spreadsheet to capture the details of all attendees. Eventbrite automatically does this. If you have used a guest list keep a separate worksheet for those who have declined the invitation and a column for notes.

A week before your registration deadline issue a reminder message to all those who haven't replied prompting them to do so. This is why it's important to note those that have declined the invitation! Email all those who have confirmed attendance a few days before the event with an event reminder email to ensure that they attend and update you if their status has changed. Your master spreadsheet can be used to produce a registration list for use at the start of the event. Prepare the spreadsheet and highlight speakers/VIPs so that your registration team can inform you when they arrive. Print it as late as possible as last minute changes will happen. Print more than one copy of the registration list to avoid queues.

Consider producing name badges to be picked up at the registration point and include the delegate's name, job title and organisation to help networking. Use a very large font to make the badges as easy as possible to read. If time or staff is limited, consider asking delegates to write their own badges on arrival.

Presentations

When your agenda and speakers are finalised you can develop a PowerPoint presentation to match the event schedule. It's a good idea to have all speakers' presentations before the event day so they can be stored together, ordered in accordance with your schedule and tested on the venue's technical equipment.

Remember to include holding slides which can be shown if any issues occur. Include your logo on all slides and also erect pull-up promotional banners around your event venue. A 'thank you for attending' slide is important at the end of the event and this gives you the chance to share contact details and key messages with delegates.



**IT'S A GOOD
IDEA TO HAVE
ALL SPEAKERS'
PRESENTATIONS
TESTED ON
THE VENUE'S
TECHNICAL
EQUIPMENT
BEFORE THE
EVENT DAY.**

Logistics management

Venue

Selecting a suitable venue is a vital step in the event planning process. Invitations cannot be issued and the event cannot be promoted until a venue is secured.

You may be able to source a free venue through your employer or a contact. A site visit is always recommended during which the venue manager should show you around the venue and address several key considerations including:

- **Availability** - is the venue available on your preferred event date and time?
- **Capacity** - How many people can the venue hold and how many rooms do you need?
- **Accessibility** - Is the venue accessible via public transport and what are the parking options (remember that your suppliers, key speakers and VIPs should be given priority parking). Also consider whether the venue is accessible for wheelchair users (some listed buildings will not be) and consider hearing loop requirements.
- **How much will the venue hire cost?** Consider all extras like tablecloths, cloak room staff, and car park hire fee when establishing a quote and factor in VAT if applicable.
- **Does the venue provide in-house catering** and what are their rules for bringing food in or using an alternative supplier (this can affect your costs substantially)? Once you are happy that all your key considerations have been met ensure that the venue understand each requirement that you have discussed with the venue manager by recording it on a booking sheet and sign a contract agreeing the final cost.



**IS THE VENUE
ACCESSIBLE FOR
WHEELCHAIR
USERS AND
ARE THERE
HEARING LOOP
REQUIREMENTS?**

Floor plan

Seating layout and the event floor plan can play a large part in achieving successful engagement with your delegates. When deciding on a seating plan consider your event agenda and whether you want delegates to be listening or talking in groups.

For example, if you want your delegates to breakout and discuss a topic then theatre style seating will not enable this to happen. Round table style seating inevitably means that at least one person is not facing the speakers/host and means that less people can attend your event. Consider your agenda, the number of delegates and the advantages and disadvantages of the seating plan before you make any final decisions. Remember to share your final decision with the venue manager.

When considering the layout for your event, it's a good idea to draw up a seating and floor plan which details catering serving points, room for networking, a cloakroom and a technician's desk.

Reserve seats in the front row for speakers and VIPs. If your event is taking place during the winter months and delegates are likely to be wearing coats, consider whether the venue offers a cloakroom service or whether you can hire a clothes rail with hangers.

Investing in décor is a luxury, but if you can afford it if this can enhance the overall look and feel of the event and help create a professional impression. Speak to your venue manager about table cloths and if possible tone these in with your PowerPoint presentations, signage and any other décor items. Flowers are a luxury item, but pedestal bouquets can be given to special guests/speakers post event as a thank you.

Catering and refreshments

If an evening meeting is being organised, it is very important that some sort of refreshment is served. Hungry delegates will not leave your event feeling happy however good your event content was. Your venue may provide catering or alternatively they may be happy for you to bring in your own food and drink.

This can save a substantial amount of money. Have this conversation with the venue manager when you first make contact and factor refreshments into your budget.

It is essential that all food and drink provided is labelled with allergens. Consider all delegates' dietary requirements and if you are expecting large numbers set up two identical serving points and set up a separate drinks point to help alleviate queuing.

Technical requirements

Speak to the venue manager about their technical provision. Some venues will supply in house audio visual equipment and technicians. Consider screens for PowerPoint presentations, mics for speakers (including the options for lapel and/or handheld and roaming handheld mics for Q&As), laptops and DVD players. Some venues will provide an approved supplier list for technical support.

Lighting is often overlooked or seen as a luxury but it's important to light all presenters/speakers adequately. Uplighting can transform a venue and create an atmosphere at an evening event.



**IT IS ESSENTIAL
THAT ALL FOOD
AND DRINKS
PROVIDED ARE
LABELLED WITH
ALLERGENS.**

On the day

Packs

Delegate packs are often factored into pre-event planning. Packs can hold a host of information useful to achieving the outcomes of your event. A letter to each delegate can be included in the pack as well as leaflets, an event agenda and any other information that may be of use.

Pre-event

Schedule a staff briefing pre-event to communicate your plans to your team. During the briefing you must share information about roles, duties, responsibilities, the event agenda, timings and full event details. If you are the event manager try not to take on any specific roles other than managing the overall event!

If your event will start in the morning discuss the possibility of setting up the venue the day before.

Pre-event top tips:

- **Run through** all audio visual equipment and schedule a rehearsal if possible
- **Tour the venue** – make sure everything is set up as you specified and make changes if required
- **The porters, duty manager and receptionist** are your friends! Make sure that you have introduced yourself to the key venue personnel on the day and that they know
 - a) you're in charge and**
 - b) what you expect from them.**

During the event

It's really important to keep the venue informed if your schedule is running over or under time so that they can amend their plans and adapt their timings concerning catering and any other users. Keep your eye on things like room temperature and speak to the venue personnel to make changes if required.

Don't forget to promote your event whilst it's happening. Twitter is a great tool for doing this. Establish a hashtag pre-event and share it with delegates so that they join in the conversation about your event.

Take photos of your event and include these in your tweets. It's really important that all event delegates know that you are taking photos that could be used in publicity. It's good practice to have your host announce this at the start of the event and have some signage on display around the room that notifies delegates that their photos may be taken and used in publicity.

Good action shots are not easy for an amateur photographer. Consider a good location for taking a group shot which can be used in publicity and make time to set this up. It's important to be able to caption your photos so make a note of who is in which photo in order to make this as easy as possible.

Delegate the responsibility of noting down key facts and happenings from the event so that an event report can be written and uploaded onto iCSP and possibly used in *Frontline* too. Gather some quotes from delegates too.

Post event

The hard work doesn't finish once the event is over.

Consider the following actions:

- **Share** PowerPoint presentations with delegates via email
- **Create** a survey and invite feedback about the event
- **Write** a thank you note for the speakers and host
- **Share** photos of the event with the speakers and host

**HAVE
YOUR HOST
ANNOUNCE
AT THE START
OF THE EVENT
THAT THEIR
PHOTOS
MAYBE
USED IN
PUBLICITY.**



- **Email** all delegates and inform them of your next event's details
- **Share** online CPD tool with delegates. It's important that delegates record their learning from your event. A collection of CPD templates are available on the online ePortfolio account. Signpost this useful resource to your delegates pre and post event.

Top Tips

- **Write** a 'useful contacts' list before your event with all vital telephone numbers including contractors, speakers and your own team members so if you need to contact someone in a hurry, there's no delay
- **Write** a running order document for your event. This should be a master document that contains information on all aspects of your event minute by minute. Include information like when deliveries are expected, when speakers are due to arrive, when refreshments will be served alongside who is responsible for each task
- **Don't** underestimate the power of some simple background to help set the tone of your event. Consider playing some background music whilst people are taking their seats or networking
- **Before** your event gather all vital records and lists together on a clipboard so that you have everything you need at your fingertips plus somewhere to write notes
- **Think** about pre-event signage and print signs that have details including Twitter hashtags, an invitation for delegates to 'like' you on Facebook, notice about photography or filming and also consider information like the venue's Wi-Fi password.

Good luck with your event! The Campaigns and Regional Engagement Team would love to hear about your plans.



CHARTERED
SOCIETY
OF
PHYSIOTHERAPY

14 Bedford Row
London WC1R 4ED

Web: ***www.csp.org.uk***

Email: ***enquiries@csp.org.uk***

Tel: ***+44 (0)20 7306 6666***

THE CHARTERED SOCIETY OF PHYSIOTHERAPY

is the professional, educational and trade union body for the United Kingdom's 57,000 chartered physiotherapists, physiotherapy students and support workers.

**THINK
PHYSIO**
for primary care

**This document can
be made available
in a format for people
with visual impairment
Tel: 020 7306 6666**

It's all at:
www.csp.org.uk/englishnetworks