

EVENT PLANNING GUIDE:

Organizing Your American Archives Month Event

The key to any successful special event is planning. Ideally you will begin thinking about your American Archives Month event(s) six to twelve months ahead of time. As early as possible, determine the goals of your project, the target audience, the costs, the number of volunteers needed, the event location, and any liability or safety issues that you may have to consider.

Following are some steps to guide you through planning and implementation of your event. Also provided is a comprehensive checklist, originally developed by the Wisconsin Sesquicentennial Commission and adapted over time by many organizations for Archives Week and Archives Month activities.

There are six major considerations when organizing a special event:

- Planning
- Publicity
- Sponsorship and Donations
- Legal Aspects
- Implementation
- Follow Up

PLANNING

Set goals. Before you do anything else, decide why you are planning the special event and for what target audience. Is your goal to raise funds? Attract media and/or the public's attention to increase traffic to your repository? Raise general awareness about archives?

For "A Dozen Ideas for Reaching Out to Your Community," see page 3 of the *2007 American Archives Month Public Relations Kit* at www.archivists.org/archivesmonth

Know your audience. Are you trying to reach young people, influentials within the community, potential donors, older citizens, teachers, or the general public? Consider what message(s) might be most appealing to your target audience – and then develop an event that will help to deliver that message.

Establish a schedule. Develop a timetable of everything that must be accomplished before, during, and after the event. Look for volunteers who have experience in organizing special events and a reputation for getting things done. Hold regular meetings or email "conversations" to keep volunteers informed of the event's progress. Consider forming an event committee and subcommittees to handle the logistical details of the event, including overseeing volunteers. Include on your timetable a round-up meeting

before the event to make sure that all volunteers have completed assigned tasks and to resolve last-minute issues. (See page 5 for a Sample Timeline for media relations.)

Select a location. Choose a site that is easily accessible, offers ample parking and restroom facilities (be sure to consider individuals with disabilities), and has other specific features that you may need. Most city, county, or state jurisdictions require groups to file for a permit to hold special events on their property. Contact the local authorities (typically the mayor's office) and file for a permit early in the planning stage.

Know the competition. Find out if other events are being held in the community at the same time or close to your location. Watch for potential conflicts that may draw people away from your event. Scour your newspaper's online community calendar for this information.

Develop job descriptions. Put each job responsibility in writing. Make sure your volunteers know exactly what is expected of them, and stress the importance of meeting deadlines.

Plan for photography. Great photography will allow you to remember your event for years to come! Determine who will take photos at your event. Be sure your photographer knows of any recommendations or requirements for photos. Some examples: Be sure to take pho-

tos of VIPs, as well as powerful or interesting action shots. Compose photos in a manner that gives the viewer the most information possible. Avoid mug shots against a bare wall and drinks in hand. If possible, include a banner, enlarged photo, or "cool" things from your collection or holdings as a backdrop to provide context and enhance interest. If possible, ask individuals if they mind being photographed before proceeding. If that's not possible, follow up with them after the shot is taken to make sure that you may release the photo. (See below.)

Keep track of captions. While taking photos, be sure to keep track (on a separate piece of paper) of the names of those in the photos. This will help you identify individuals and describe the action in your captions.

PUBLICITY

You'll want to publicize your event through the local media and directly to your community. For "5 Easy Steps for Ensuring Media Coverage of Your Archives Month Event," see pages 6 and 7 of the *2007 American Archives Month Public Relations Kit* at www.archivists.org/archivesmonth

To spread the word to your community, consider:

- Posting the event information on your website.
- Contacting local businesses to display your poster in their windows and promote your event to their staffs.
- Suggesting that a local business mention your event in their paid advertising (especially if they're a sponsor).
- Displaying your event information on bank marquees, in retail store windows, and on bulletin boards in community centers.

SPONSORSHIP AND DONATIONS

Why seek a sponsor? Special events can be costly. You may be able to recruit a corporate sponsor to cover some or all of your costs or to donate equipment, goods, or food and beverages.

Approaching prospective sponsors. Approach a potential sponsor well in advance, ideally before the company has established its budget for the coming year. Provide evidence that the event is well planned and has great potential for success. Offer examples of brochures, flyers, fact sheets, press releases, or any other publicity materials that you have created, and provide an estimate of the number of people who are likely to attend. If you have contacted the sponsor for a previous event, include the results of that event – and indicate how the next one will be even more successful!

Preparing a sponsorship proposal. Most companies require a formal written proposal before they will sponsor an event. Keep the following points in mind when preparing your proposal:

- Explain how the sponsorship will spark business for the company and provide positive impressions to the community. Communicate how large (or influential) the event will be and focus on how the event will help to increase sales (or influence) for the company.
- If you have multiple sponsorships available, tell each potential sponsor about the others. This will help to avoid conflicts and may make participation even more attractive.

- Build sufficient lead time into the proposal. As much as 6-12 months is needed for many companies to provide financial support for an outside project.
- Address and send your proposal to the person who makes the final decision about what activities to sponsor. Follow up with a phone call.

LEGAL CONSIDERATIONS

Properly insure your event so that your organization and its volunteers are protected in case of injury. Your organization's insurance agent may be able to simply attach a rider to the existing policy. Don't assume that your regular insurance coverage is adequate!

DOUBLE-CHECK THE DETAILS

When the planning phase is nearly complete, think of everything that could go wrong and develop a contingency plan to handle it. If yours is an outdoor event, set up a plan of action in case it rains. If you've scheduled a celebrity to speak, know what to do if he or she cancels at the last minute.

But expect the unexpected. No matter how much preparation goes into an event, something (nearly) always happens for which you had not planned.

Contact all speakers, sponsors, volunteers, and others involved in the event at least two weeks before the date to make sure that everyone knows their responsibilities and to tie up any loose ends. Make follow-up calls a few days before the event to further

ensure that details are understood and completed. Confirm all arrangements in writing.

WHEN IT'S OVER

Send a "thank you" note to everyone involved in the activity, including sponsors, donors, media, partners, and volunteers.

Make a list of the things you would and would not change the next time. Prepare and mail (or email) a survey to solicit feedback from volunteers and participants. This information will be invaluable as you begin planning for next year!

EVENT PLANNING:

A Comprehensive Checklist

The key to any successful special event is planning. Ideally you will begin thinking about your American Archives Month event(s) six to twelve months ahead of time. As early as possible, determine the goals of your project, the target audience, the costs, the number of volunteers needed, the event location, and any liability or safety issues that you may have to consider.

This comprehensive checklist was developed by the Wisconsin Sesquicentennial Commission and adapted over time by many organizations for Archives Week and Archives Month activities.

GENERAL PLANNING	PERSON RESPONSIBLE	DEADLINE	COMPLETED
Budget finalized; approvals obtained			
Date and time set; double-checked for conflicts with other events			
Site booked and confirmed; rain location selected			
Food/beverage arrangements made			
Safety measures determined			
Legal matters addressed (eg, permits, liability coverage)			

STAGING	PERSON RESPONSIBLE	DEADLINE	COMPLETED
Timeline of activities			
Map of site/location			
Parking			
Power sources: location of outlets, extension cords			
Electrician available			
Thermostat to control temperature			
Stage/podium			
Sound equipment, microphones, special AV equipment; person to test/operate			
Special lighting/special effects			
Musicians, taped music			
Seating, clear view from all seats			
Set-up and rehearsal arrangements			
Photographer, videographer			
Necessary lodging, transportation			
Storage			
Signs			
Displays, exhibits			
Coat check and restrooms (with signs)			
Registration, tickets			
Food, catering			
Waste receptacles			
Area for reporters & cameras, press table			
Security			
Emergency numbers, medical personnel			
Generators for power if needed			

A Comprehensive Checklist CONTINUED

PARTICIPANTS	PERSON RESPONSIBLE	DEADLINE	COMPLETED
Speakers confirmed			
Performers' contracts confirmed			
Speeches approved			
Visuals prepared			
Agenda			
Program for attendees			
Nametags			

INVITATIONS/PROMOTION	PERSON RESPONSIBLE	DEADLINE	COMPLETED
Guest list developed			
Design, approval, print delivery			
Mail date			
Invitation includes: <ul style="list-style-type: none"> • Date, time, location • Map of site/location • Name & phone number of contact • Deadline for RSVP • Reply card • Parking information 			
Confirmation letter			
Reminder phone calls			
Flyers			
Posters			

PUBLICITY MATERIALS	PERSON RESPONSIBLE	DEADLINE	COMPLETED
Media list			
Media advisory inviting reporters & editors			
News release			
Background/fact sheet			
Speaker bios			
Copies of speeches			
Photos, slides			
Folder for press materials (press kit)			
Assembly, mailing kits			
Follow-up with reporters			
Speakers briefed on possible questions from reporters			

Sample Media Relations Timeline for Your Event

The key to any successful special event is planning. Ideally you will begin thinking about your American Archives Month event(s) six to twelve months ahead of time. As early as possible, determine the goals of your project, the target audience, the costs, the number of volunteers needed, the event location, and any liability or safety issues that you may have to consider.

This timeline will give you an idea of how to schedule the media relations component of your event. See also “5 Easy Steps for Ensuring Media Coverage of Your Archives Month Event” in the *2007 American Archives Month Public Relations Kit*, pages 6–7.

6 TO 8 WEEKS OUT:

Identify Your News and Audiences

- Hold a brainstorming session with other Archives Month planners to determine your news “hook.” Use materials in the American Archives Month Public Relations Kit to help you think through your key audience(s), message(s), and medium(s).
- This year’s featured topic is very broad – “Celebrating the American Record” – so be sure to put a local spin on the topic (or choose your own topic!).
- Use American Archives Month as an opportunity to educate your audiences via your news. Although your event is newsworthy in itself, your chosen topic should be newsworthy, too. (See “How To Know If Something Is Newsworthy” at www.archivists.org/archivesmonth.)
- Keep in mind that your messages may be different for different audiences. For example, how you would inform or educate public policy leaders may differ from how you would inform or educate teachers or the general public.
- Remember that you can host one event or a few consecutive events in October (American Archives Month) in order to serve multiple audiences.
- Refer to “Organizing Your American Archives Month Event” to help you plan and conduct your event(s).

5 WEEKS OUT:

Develop and Order Your Media Materials

- Once you’ve identified your audiences, your “news,” and your event plans, focus on getting the word out to the media. The media is your voice to external audiences.
- To reach one of your key audiences – the media – develop a media alert and a news release. Reporters and editors need to know who to contact with questions. Assign a volunteer to be the point of contact for the media to ensure that your message is consistent. The contact’s name, email address, and phone number should appear in the upper left or right corner of the media alert and news release.
- If you plan to distribute flyers, press kits, “goodie bags,” or other materials at your event, order them now.

4 WEEKS OUT:

Identify Your Media

- A media list is an effective way to maintain and organize your media contacts in one accessible place. Create a media list template using an Excel spreadsheet. (See “5 Easy Steps for Ensuring Media Coverage of Your Archives Month Event” in the *2007 American Archives Month Public Relations Kit*, pages 6–7.)

- Visit the home pages of the media on your list and search for their online community calendars. Many online community calendars will allow you to enter your event information online. Once your language is approved, chances are good that your event will be posted.
- In addition, distribute your media alert to community calendar editors via email, fax, or postal mail, depending on the editor’s preference. (Community calendars carry only the basics of your event, so the media alert is the most effective tool for communicating with this group.) Four weeks out from your event may seem early, but many community calendar editors work well in advance. Reminder: Copy and paste the media alert into the body of your email message. Many media outlets will not accept email attachments due to spam/junk email filters.
- Although most community calendar departments are looking for events to fill space, it’s a good idea to follow up your media alert with a quick phone call to the community calendar editor. Feel free to leave a message with the date on which you sent the information, a brief description of your event, and your name and phone number.
- Draft your news release.

Sample Media Relations Timeline for Your Event CONTINUED

3 WEEKS OUT:

Contact Media Outlets

- At this point your media list is created, your media alert is sent, and your news release is drafted. The next step is to share your “news” via the news release.
- Send your news release via email, fax, or postal mail. Avoid contacting reporters early Monday or late Friday afternoon.
- Copy and paste the news release directly into the body of your email message. Don’t attach files, as many media outlets don’t accept email attachments.
- Follow up with telephone calls the day after your initial outreach to ensure that your key media contacts received your information and to ask if they have any questions. The best time to make follow-up calls is between 10:00 am and 3:00 pm. Feel free to leave a message with the date on which you sent the information, a brief description of your event, and your name and phone number.
- If your contacts tell you that they are going to pass on writing a story and/or attending your event, ask what the chances would be for an online story. Larger media outlets have a separate online editorial staff. Ask to be transferred to the appropriate staff.
- Also ask about the chances for post-event coverage. Make a notation on your media list of any representatives who welcome photos and are willing to write a post-event story.

- Designate an event photographer. Be as specific as possible about the types of photos that you would like (eg, group shots, sponsor shots, individual shots).
- **Radio:** When following up with radio station contacts, be sure to invite your highest-priority station to cover the event live. Having a celebrity radio host or deejay will draw attention to your event and provide free advertising for the radio station. Also ask if the radio station can promote your event in advance.

2 WEEKS OUT:

Continue to Follow Up

- Continue to follow up until you speak with a media representative by phone. Good media relations – establishing rapport with media representatives – can be the key to obtaining coverage of your story. Be concise in explaining how your event is a public service and how a story will help inform their audience.
- Make notes on your media list of how your contacts respond to your event and your “news.” This will be good to know for future events.
- With those media who pass on a story, inquire about additional options, such as an online or post-event article.
- **Television:** Two weeks out is still a bit early for television stations to commit. But it doesn’t hurt to get your event on their radar screens. Remember that breaking news may cause the station to change its priorities in an instant. Your big television push should be the week before and the morning of your event.

1 WEEK OUT:

Final Follow Up

- Push for television coverage. Send your media alert to your television media representatives (ie, those who haven’t already committed to coverage) via fax or email.
- Focus your efforts on those media you haven’t reached by phone and those who have not committed to coverage.

DAY OF THE EVENT

- As early as possible, send your media alert via fax or email to all of your television media representatives (ie, those who have and those who have not committed to coverage). The media alert is a good reminder of your event.
- Have on hand a final list of the media representatives who are planning to attend. Set up your press table to check in the media and provide them with the materials you’ve developed.

Remember that no one can predict the events of the day. You’ve done all you can to get the word out about your event. Now enjoy the event that you’ve worked so hard to plan!

IMMEDIATELY FOLLOWING YOUR EVENT

- Try for some post-event coverage from those media reps who seemed receptive prior to your event. Act quickly; after a few days, your event is “old news.”
- Write a news release about the event focusing on the fact that it took place and why it was a success. Highlight

attendance, VIP appearances, and other big results. Be sure to specify that you can send photos upon request. If your contacts previously expressed an interest in photos, paste the actual photos into the body of your email message. Remember to include a caption to correspond with each photo.

- Follow up via phone to make sure that your contacts have received your post-event news release and to ask about their interest in post-event photos.
- Maintain the relationships that you establish. Tell your contacts how their article or broadcast increased attendance or otherwise contributed to the event’s success. Send a thank you note to express your appreciation for their help in spreading the word about archives and archivists.
- The last step in any media campaign is to report your results. Monitor the news for stories about your event. Save the URLs of online stories, forward them to colleagues and patrons, and post them on your institution’s website. Frame print stories for display in your repository.
- Don’t forget to send your post-event photos and a brief event description to SAA staff at archivesmonth@archivists.org. We’ll display them on the SAA website (www.archivists.org/archivesmonth) so that your colleagues can learn from your great ideas!