Foundations of Event Management

JMC/EVNT: 3250:0002/ SRM: 3154:0002
The University of Iowa

Instructor: Heather Spangler

Location: 221 Jessup Hall

Time: 9:30 to 10:45 a.m. Tuesdays & Thursdays

Office Hours: 1:30 to 3:30 p.m. Mondays & Wednesdays and by appointment

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E320 AJB
319-335-3389
*Email is the best way to reach me

Course Overview:
Event planning is a growing, changing industry that allows professionals to employ their communication, marketing, social media, and project management skills. In this course we will explore the event-planning field through speakers, research, and hands-on experiences.

Prerequisite and requirements:
Students must be willing and able to put in time outside of class to volunteer at an event and visit an event site. It may be necessary to travel off campus or out of Iowa City to complete these tasks.

Text:
There is no required text. Supplementary readings and resources will be posted to ICON.

Major Assignments:
Major assignment sheets are attached at the end of this syllabus. Each assignment will be discussed in more detail in a timely manner, but here is the gist:

- **Attendance & Participation**: Students will register their participation each class period by submitting to ICON a sample tweet featuring a highlight of the day. Tweets can include images or links. One student each class period will earn an extra credit point and have their tweet published @UIEventPlanning. Students who must miss for an approved absence should upload the relevant documents to the ICON dropbox to receive credit. (32+ points)
- **Class Project Participation**: We will plan two real-world events as a class. There will be action steps that need to be taken outside of class. Students can earn up to 25 points by volunteering
to take on one of these tasks and successfully completing it. You will document your completion by submitting a description of your task and any relevant tangibles to the ICON dropbox.

- **BizBash Daily Reports:** Students will monitor BizBash Daily, an e-newsletter from an industry leader, and will present a highlight on their assigned day. Please submit a link to your highlight via the ICON dropbox by the start of the class period you’ll present. (10 points)
- **Speaker preparation:** You will submit a 3-paragraph bio and 3 questions for each guest speaker by the start of the class period before their visit via ICON. (5 points each = 20+ points)
- **Venue Visit:** Students will work in pairs and arrange to visit an event venue to tour the space and speak with an event planner about the venue and his or her job. You will take notes and photos during your visit and present your findings as a team in a visually appealing PowerPoint/Prezi/Google Slides document. (50 points)
- **Event Volunteering Experience:** Each student will volunteer at an event. You will observe and report on successes and failures of the event along with your role and the event’s overall organization. You will describe your experience in a visually appealing PowerPoint/Prezi/Google Slides document. (75 points)
- **Final Event Plan:** You will identify a client in any sector you choose, communicate with the client about their event planning needs or interests, and produce a plan for an event that the client could choose to carry out. (100 points)

**Grading:**

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**Course Policies:**

**Attendance:**
I aim to make each meeting essential and meaningful, so please plan to attend every session or risk missing out on something important. You cannot be successful in this class if you are not consistently present and prepared. Out of respect for your classmates and our schedule, please also arrive on time and stay for the entire class period. Failing to do so will impact your grade.

Students who must miss class are accountable for all material presented and assignments given during their absence. It is your responsibility to communicate with your classmates to see what you need to know for the next session and to turn in any work that was due during the missed class period prior to the next meeting. In-class work may not be made up.

**Late Work & Early Work**
As budding event planners, it’s essential that you meet deadlines with no exceptions. I will accept late work only in extreme circumstances, including an utterly debilitating illness or a documented family crisis. It is important that you communicate with me as soon as possible if you feel you will miss turning in an assignment and provide adequate documentation to prove your given excuse. Unexcused late work will be docked 10% per day and will not be accepted more than 5 days late.
On the other hand, early work is accepted and celebrated in this course. Event planners must have an excellent sense of what needs to be done when to maximize productivity and success. I’m giving you all of the course assignment details now. If you wish to begin working on your assignments and turn them in before the deadlines, be my guest. Please check in with me and let me know of your plans in case there’s anything you need to know before you dig in.

**Workload & In-class work time**
The UI College of Liberal Arts guidelines state that each semester hour of class time should entail around two hours per week of outside homework and class preparation for the average student. For example, in our 3 semester hour course, students should expect (on average) 6 additional hours of outside work per week or a total of around 9 hours per course per week if classroom time is included.

Although spending time outside of class is expected and important, we will reserve time in class for working on your project and major assignments. Students are expected to make the post of this time and come prepared to be productive. In addition to in-class work time,

**Collaboration**
Like event planning in the professional world, a lot of what you’ll do in our class is collaborative. You will have a chance to describe your individual efforts as well as reflect on your teammates’ efforts throughout the semester. Each student should contribute an equal amount to group projects. Failure to do so will result in a lower grade. Misrepresenting your efforts and allowing others to do the work while you take credit is considered academic fraud and could be reported to CLAS. It is your responsibility to be in touch if you have any questions or concerns about collaboration.

**Professionalism**
Students are expected to behave in a professional manner in the classroom and when representing the class in any way. This includes using proper email etiquette, arriving on time, being respectful and attentive, and more. I reserve the right to reduce your final grade if these expectations are not met.

**The College of Liberal Arts and Sciences Policies:**

**Administrative Home**
The College of Liberal Arts and Sciences is the administrative home of this course and governs matters such as the add/drop deadlines, the second-grade-only option, and other related issues. Different colleges may have different policies. Questions may be addressed to 120 Schaeffer Hall or see the CLAS Student Academic Handbook [www.clas.uiowa.edu/students/academic_handbook/index.shtml].

**Academic Fraud**
Plagiarism and any other activities when students present work that is not their own are academic fraud. Academic fraud is a serious matter and is reported to the departmental DEO and to the Associate Dean for Undergraduate Programs and Curriculum. Instructors and DEOs decide on appropriate consequences at the departmental level while the Associate Dean enforces additional consequences at the collegiate level. See the CLAS Student Academic Handbook.

**Making a Suggestion or Complaint**
Students with a suggestion or complaint should first visit the instructor, then the course supervisor, and
then the departmental DEO. Complaints must be made within six months of the incident. See the CLAS Student Academic Handbook.

**Accommodations for Disabilities**

A student seeking academic accommodations should first register with Student Disability Services and then meet privately with the course instructor to make particular arrangements. See www.uiowa.edu/~sds/ for more information.

**Understanding Sexual Harassment**

Sexual harassment subverts the mission of the University and threatens the well-being of students, faculty, and staff. All members of the UI community have a responsibility to uphold this mission and to contribute to a safe environment that enhances learning. Incidents of sexual harassment should be reported immediately. See the UI Comprehensive Guide on Sexual Harassment at www.uiowa.edu/~eod/policies/sexual-harassment-guide/index.html for assistance, definitions, and the full University policy.

**Reacting Safely to Severe Weather**

In severe weather, class members should seek appropriate shelter immediately, leaving the classroom if necessary. The class will continue if possible when the event is over. (Operations Manual, Part IV, 16. See items e, h, and i.)

**Course Objectives:**

Students in this course will gain a broad understanding of the event-panning field, especially through the lenses of law & ethics, writing & storytelling, and multiculturalism.

**Law & Ethics Learning Goal**

Understand and apply the principles and laws of freedom of speech and press in real space and cyberspace, and demonstrate an understanding of professional ethical principles and their historical development.

- Students will demonstrate an ability to anticipate and recognize ethical issues when they arise and to reason through them taking multiple perspectives and contexts into account.

- Students will demonstrate an ability to explain their ethical approaches and reasoning about a particular dilemma in terms that can be understood by a diverse group of people.

**Writing and Storytelling Learning Goal**

Understand that clear, concise, correct writing is at the heart of journalistic expression and that reporting and communicating it effectively requires a knowledge and achievement of the highest, professionally-accepted standards in all work.

- Students will demonstrate the ability to gather factual story elements, and to evaluate and express them in logical, narrative forms for multiple media and audiences.
✓ Students will display the ability to access and analyze data, report facts accurately, research and edit information responsibly and in a manner commensurate with professional standards.

✓ Students will demonstrate the ability to apply above concepts in a manner that is sensitive to audiences across all media.

Multiculturalism Learning Goal

To demonstrate an understanding of the diversity of groups (including communities defined by gender, race, ethnicity, age, religion and sexual orientation) in a global society in relationship to communications.

✓ Students will demonstrate an ability to produce media that serve the needs and interests of diverse communities and reflect their voices and experiences.

✓ Students will demonstrate sensitivity to and understanding of the cultures, histories, perspectives, and socio-economic and political situations of diverse groups.

✓ Students will demonstrate an ability to work with members of diverse groups to engage publicly over issues of community interest.

Schedule:

Week 1:
Tuesday, Jan. 19: Course and classmate introductions. Event Planning Qualifications, Field Overview, and Job Outlook.
Thursday, Jan. 21: Primary assignment explanations and sign up. Class projects/clients introduced.

Week 2:
Tuesday, Jan. 26: Visit: International internships representative. NO speaker prep. Discussion: Event Planning Timeline, Budgets, Sponsors, Date selection.
Thursday, Jan. 28: DUE: Event Volunteering signup via ICON discussion board. HESA client visit.

Week 3:
Tuesday, Feb. 2: Discussion: Venues, Vendors, Catering, Contracts.
Thursday, Feb. 4: FIELD TRIP! Meet in IMU Northwestern Room to meet with catering managers and tour IMU catering operations.

Week 4:
Tuesday, Feb. 9: Field trip follow up. Discussion: Décor & Design.
Thursday, Feb. 11: Guest Speaker: Emily McMahon, owner of Soiree, a private events company.
Week 5:

Week 6:
Tuesday, Feb. 23: Discussion: Technology. Prep for client visit. Class event work time.
Thursday, Feb. 25: Client visit. Class event work time.

Week 7:
Tuesday, March 1: Discussion: Invitations, Marketing, & Social Media.

Week 8:
Tuesday, March 8: Guest Speaker: Diane DeGroote, business development & events manager, & Anna Patty, communications coordinator, of Four Oaks.
Thursday, March 10: Speaker follow-up. Class event work time. Midterm course evaluations.

**SPRING BREAK: March 14-18. Be safe and have fun!**

Week 9:
Tuesday, March 22: Discussion: Green Events.
Thursday, March 24: Discussion: Crisis Management and Legal/Ethical Elements of event planning.

Week 10:
Thursday, March 31: Event Volunteering Experience presentations.

Week 11:
Tuesday, April 5: Event Volunteering Experience presentations.
Thursday, April 7: Discussion: Event Planning in Politics. Guest speaker: Anne-Marie Taylor, political fundraiser and advance team planner.

Week 12:
Tuesday, April 12: Client visit. Discussion: Annual Events. Conferences sign up.
Thursday, April 14: Guest Speaker: Nick Arnold, Corporate Event Planner at ACT.

Week 13:
Tuesday, April 19: Individual Conferences. Conferences take place in my office, E320 AJB.
Thursday, April 21: Individual Conferences. Conferences take place in my office, E320 AJB.

*Saturday, April 23: Essential Montessori event*

Week 14:
Tuesday, April 26: Discussion: Measuring Success and Post-Event Steps.
Thursday, April 28: Class event work time. Early birds present Final Event Plans.

Week 16:
Thursday, May 5: Final Event Plan presentations.

Week 17:
**Finals Week. We will not meet, although one of our events takes place May 13 and some students will have signed up to help that day.**

{{PS: It’s important to be flexible! Please note that this is a tentative schedule. Unplanned opportunities and challenges may require changes.

**Daily Attendance**

32+ Points (plus extra credit opportunity!)

Event planners are skilled social media users and have a clear vision of the messaging they want to come out of their event for social media audiences. We’ll practice those skills as a way of taking attendance this semester.

Students will earn one point per class period by submitting a “tweet” to represent a takeaway or highlight from that day’s meeting. The “tweet” will be submitted to an ICON drop box. Students who must miss for an approved absence should upload the relevant documents for credit.

I’ll peruse the tweets and could choose one or more to publish on Twitter @UIEventPlanning. If your tweet is selected, you will earn 1 extra credit point, with a maximum of 4 extra credit points over the course of the semester.

Your submission must adhere to Twitter formatting rules for extra credit consideration. Preference will be given to “tweets” with strategic hashtags, photos, links, and rich media elements.

**Class Project participation**

25 points

We will put course concepts into practice by planning and pulling off two actual events as a class. To do so will require several action steps outside of class. Students will sign up to take responsibility for an action step. You will submit the results/evidence of your work to the ICON dropbox to earn up 25 points. Students will be responsible for meeting individual deadlines on these action steps. Failure to complete your action step in a timely, thorough, or professional manner will result in a lower grade.
Event 1: Fundraiser to support Essential Montessori, Date: Saturday, April 23, time and location TBD.

Event 2: Graduation celebration and hooding ceremony for Ph.D. students in the UI College of Education’s Higher Education and Student Affairs program. Date: Friday, May 13, in the afternoon.

Action Steps:
Client communications (2)
Trello board and timeline management (2)
Researcher (2)
Manage budget (2)
Identify and pitch alternative venues (4)
Plan menu and order catering
Create play list(s) and event scripts
Oversee event social media
Design and create invitations
Manage RSVPs and guest communications
Select and order graduate and speaker gifts
Design graduation programs/event materials
Design silent auction bid sheets, including organizing items into groups
Activities planner
VIP graduation guest liaison
Décor and set up plan (2)
Thank you notes (2)
Technology expert and out-of-town guest engagement expert (2)
Sustainability and waste expert
Crisis planning and management
Last minute errands runner
Fundraiser Day-of-crew (up to 6)
Graduation Day-of-crew—set up (up to 4)
Graduation Day-of-crew—event orchestration (up to 4)
Graduation Day-of-crew—Photographer (up to 2)
Graduation Day-of-crew—tear down (up to 4)

BizBash Daily Report
10 points

A successful event planner is innovative, on top of industry trends, and keeps an eye on the “competition.” To get you in the habit, I’m asking each student to sign up for BizBash Daily, a daily e-newsletter from a leading source of inspiration in the events industry. You’ll find a link at www.bizbash.com.
You each will be responsible for monitoring the newsletter for one week and will present one highlight to the class on your assigned day. A highlight can be something that you found inspiring, surprising, or even an example of something you didn’t like.

Your presentation should be brief (less than 5 minutes) and informal, but you should plan to pull up a visual to help foster understanding and discussion. BizBash discussions will generally be at the start of our class period, so please plan to arrive a few minutes early on your day to set up. To receive credit, you will submit a link to the item you discuss to the ICON dropbox.

**Speaker Preparation**  
5 points each

We are lucky to have some interesting, successful event planners join us for in-depth conversations about their work. To help our guests know that we are engaged, and to make the most out of their visits, you should conduct a little research on each person and their work in advance.

Based on that research, please submit to ICON a 3+-paragraph summary of the speaker’s bio and pertinent details about their occupation/place of work along with at least 3 questions you’d like to ask the speakers.

You should plan to ask one of your questions if there’s a lull or an appropriate time. There’s nothing I hate more than crickets when a speaker is willing to answer questions.

Speaker Preparations are due by the start of the class period before the speaker’s visit. Example: If the speaker is coming on a Thursday, the assignment is due by class time Tuesday of that week. Please see our weekly schedule for speaker dates and plan accordingly.

**Extra Credit Opportunity:** We will need a volunteer to send a thank you note to each guest speaker. This person will receive 2 points of extra credit for composing and sending this note. Please BCC me so that I will receive a copy of the thank you.

**Venue Visit Assignment**  
Due Feb. 16  
50 Points

At the start of our course, you should have signed up in pairs to visit one of several local venues.

**Step 1:** Contact the venue to schedule a visit together. Depending on the type of venue you chose, you might reach out to a catering manager, event supervisor, etc. Please note: there will be no extensions or venue switches allowed for this assignment unless you let me know by the end of Week 3 of our course that there is a scheduling problem with your assigned venue.

**Step 2:** Tour the venue to learn about the types of events the venue hosts, examples of annual or typical events, examples of outliers or unusual events, how events are planned at the venue, and details entities planning events there need to know.
Ask for copies of contracts, checklists, other pertinent documents related to events in the venue.

Ask about the person giving you the tour—what is his or her title, what are his or her responsibilities? What does he or she like and dislike about the job?

Ask your own questions as well. What do you want to know?

**Step 3:** Take photos on your tour and locate supplementary visuals online or through your host.

**Step 4:** Together, organize your findings into a PowerPoint or Prezi and submit your presentation file and additional notes via ICON. As time permits, all student pairs will share their presentations with the class.

*Please note that you will be graded on the document you submit, not the presentation, so don’t leave anything out!

**Event Volunteering Experience**

Due March 29
75 Points

**Step 1:** Identify an event that can use you as a volunteer. To qualify, the event should draw at least 20 people. You can find events by searching community and university calendars. I will offer suggestions and opportunities, but it is your responsibility to select and line up an event.

**Step 2:** Post to the ICON discussion board by Sept. 1 the event you plan to volunteer with. If more than 4 other students have already posted about your event, you need to choose a different one.

**Step 3:** Be in touch with event organizers letting them know you would like to volunteer. Follow their instructions for how to carry out that goal. You should dedicate at least 4 hours in advance of the event and at least 4 hours carrying out the event. If your selected event doesn’t need volunteers or it doesn’t work out for any reason, be in touch with me ASAP.

**Step 4:** As you are completing your volunteering duties, take notes on how the event is organized. How do event managers communicate with volunteers? How do guests learn the details they need to know? What choices do you see the event managers making—venue, vendors, décor, marketing, technology, activities, etc.? How are guests responding to the event? How are event managers handling the stresses of carrying out an event? What recommendations would you make for improving the event in the future?

**Step 5:** Take photos of the event and gather supplementary photos online.

**Step 6:** Organize your findings into a PowerPoint or Prezi and submit your presentation file and additional notes via ICON. As time permits, all students will share their presentations with the class.

*Please note that you will be graded on the document you submit, not the presentation, so don’t leave anything out!
Final Event Plan  
**Due May 3**  
**100 Points**

Throughout the semester we’ve been talking about the event planning process and planning events as a group. This is your chance to call all the shots! Identify a client, communicate with the client about their event planning needs or interests, and produce a plan for an event that the client could choose to carry out. As time permits, students will present their plans to the class on May 3 and 5.

**Grading:**
You will be graded based on incorporation of course content, professionalism, detail, evidence of research, potential for event plans to be implemented, as well as spelling, grammar, & organization.

**Client & Event Parameters:**
1) You should not be currently affiliated with the client—no planning something for an organization or business where you already have insider knowledge and access.
2) The event you plan should require in-depth thinking and research to allow you to gain meaningful experience. Choose an event of appropriate scope. A brownbag lunch for 10 people is too simple. A week-long international conference is too complicated.
3) This should be a new event, not a revamping of an existing event.

**Details:**
Your ICON submission should be in one Powerpoint/Prezi with an embedded spreadsheet and links to external components on Trello and Pinterest. Be sure your settings allow me to access your work, or, if you’d rather, invite me to join your boards privately. Please also include screenshots of your boards as a backup method to provide me access to your work. This report should be specific, in depth and a go-to document to actually make this event happen. It should include:

1) Background information on the client.
2) Notes/bullet points from your client interview about event goals and preferences.
3) Information about competitors’ events or similar events.
4) Specific event plans including:
   a. Venue
      i. A description of where the event should take place and why.
         1. Contact information for venue representatives.
         2. Details for guests about whatever they’ll need to know.
      ii. Two alternative sites in case your client prefers other options.
      iii. If you’re planning an outdoor event, a back-up plan for inclement weather.
   b. Guests
      i. Who is the target audience for this event?
      ii. How many people are you planning for and how did you arrive at that number?
   c. Vendors (PINTEREST)
      i. Who will provide food, decorations, staffing, entertainment, etc.?
      ii. What specifics can you share with each vendor?
1. Proposed menu.
2. Decoration vision.
3. Space set up.
4. Staffing needs/tasks.

d. Activities (PINTEREST, TRELLO)
   i. What will happen at your event?
   ii. What is your proposed schedule of activities at the event?

e. Estimated costs (Embedded GOOGLE DOC or Excel spreadsheet)
   i. This should be as detailed and accurate as possible.
   ii. Include options for shaving costs whenever possible, to allow flexibility.

f. Marketing
   i. How will you reach out to potential guests?
   ii. How will you collect RSVP information (if relevant)?

g. Social Media
   i. What role will social media play leading up to your event?
   ii. How will social media be incorporated in your event?
   iii. Post-event?

h. Sustainability
   i. What will be the environmental impact of the event?
   ii. What ideas do you have to minimize that impact?

i. Crisis Management
   i. What crises can you anticipate?
   ii. How will you prepare to prevent and face these anticipated crises?

j. Plans for measuring the event’s success.

k. A timeline with task list for implementing the event. (TRELLO)

l. Any other details pertinent to your specific event.

External Components:

1) Trello: Please provide links to two Trello boards.
   a. Detailed task list for planning the event.
   b. Detailed task list for the day of the event.
   c. To ensure that I can see your board, please set it to public, invite me to join the board, AND attach to your assignment submission a screenshot of your boards.

2) Pinterest: Please create a vision board to gather ideas and specific examples. If you do not wish to make your board public, you must invite me to join the board. Please also submit a screenshot of the board with your assignment.
   a. Venue
   b. Menu
   c. Décor
   d. Entertainment
   e. Activities
   f. Etc.

*Please note that you will be graded on the document(s) you submit, not the presentation, so don’t leave anything out!
Day 1 Survey

Name:

How is your name pronounced?

Major:

Have you signed up to earn or are you planning to earn your Certificate in Event Planning?

Hometown:

Hobbies:

Is there anything else you’d like me to know about you?