



Event Planning Guide

Event Planning Guide: Lessons Learned from the Kentucky Inclusive Workforce Summit

Background and Purpose

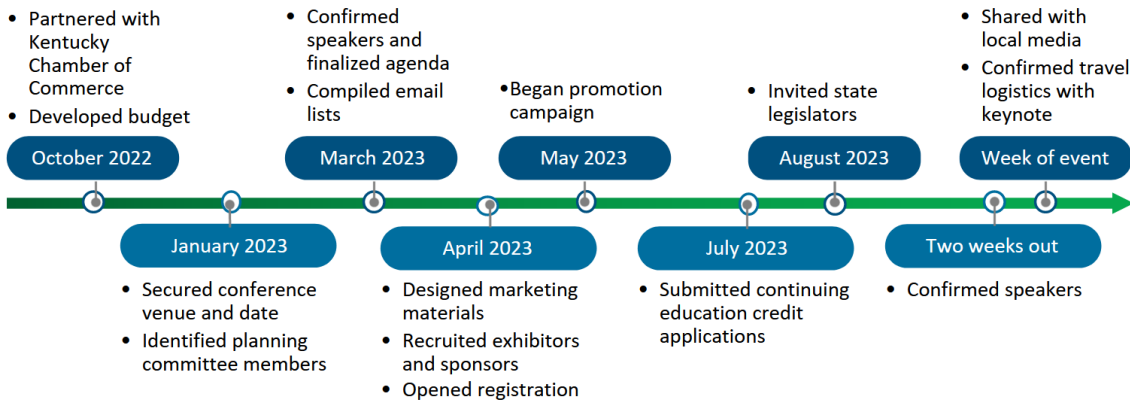
In September 2023, the Retaining Employment and Talent After Injury/Illness Network (RETAIN) Kentucky team cohosted its Inclusive Workforce Summit with the Kentucky Chamber of Commerce. They saw an opportunity to use the messages of inclusivity from the Kentucky [Employment First](#) framework. Employment First sets an expectation of work as the first and primary option for people with disabilities who want to work. This aligned with RETAIN's goal to help people with injury or illness safely stay at work or return to work (SAW/RTW).

They brought together 259 interested parties, including employers, human resource professionals, health care providers, community leaders, disability service providers, and state legislators, to learn more about inclusive employment practices, the RETAIN program, and SAW/RTW best practices.

Events like this can help RETAIN programs promote themselves, recruit employers, and advance SAW/RTW best practices with key audiences. Including policymakers can help support sustainability by showing the value of RETAIN to participants and society. Including leaders from workforce and health care can contribute to sustainability goals by breaking down the silos between workforce and health care agencies and organizations.

This guide will provide information about how to plan a similar event for your RETAIN program using lessons from RETAIN Kentucky's success.

Timeline for Kentucky's Inclusive Workforce Summit



Preparation

Before booking anything, the team needs to make some decisions. Here are a few questions to consider:

- What are your goals for this event? How will you measure success?
- Do you have the resources to host an event (e.g., staff, money, and time)?
- What limitations do you have on your funding sources?
- Do you need to follow a specific approval process? How long will it take to obtain approvals?
- Can you combine multiple funding sources to cover gaps? For instance, if your federal funds do not allow the purchase of food or swag, can you cover those costs with a different grant, or can you partner with another organization to acquire those items?
- Will you need to recruit one or more partners to help with planning and execution?

The RETAIN Kentucky team knew they wanted to use the state's Employment First framework as a springboard to promoting inclusion, accessibility, and SAW/RTW best practices. But they needed help to pull it all together. They partnered with the Kentucky Chamber of Commerce, which had experience, resources, and connections within the business community.

Developing a Budget

When developing a budget, consider how much you will need to spend in total and for various items, including the following (see page 8 for a basic budget template):

- Venue (e.g., venue space, furniture/equipment rentals, decor and signage, applicable labor fees, service charges, and taxes)
- Speaker fees and travel, if applicable
- Food and beverage
- Travel and lodging
- Promotion and marketing (e.g., advertising, promotional items, and website hosting)
- Miscellaneous (e.g., gift bags, stationary, supplies)



Before You Start Planning

- **Assemble a team:** Assemble a planning team and assign specific responsibilities. Identify people or organizations to partner with.
- **Set objectives:** Decide what you hope to achieve and identify metrics to define success.
- **Develop a budget:** Outline how much you want to spend, where the funds will come from, and how much, if at all, you will charge people to attend.
- **Create a theme and choose session topics:** Pick a theme for the content of presentations and materials to follow. Determine the content you want to include and identify presenters who can share that content most effectively. Determine the types of sessions you want to include in your agenda (e.g., workshops, panels, keynote presentations, concurrent breakout sessions) and how to cohesively fit them together.
- **Define your audience:** Decide who you hope will attend, what you hope they will learn, and the actions you want them to undertake during and after the event.
- **Choose your format:** Decide whether the event will be in-person or online. Do you want to put out a call for proposals or find and approach speakers yourself? Your decision on the format should take into account the amount of planning time you will need. Online events can be planned in a shorter time frame than in-person events. A call for proposals and a proposal review process to facilitate agenda development can be a multi-month process with additional budgetary implications.

Logistics Planning

Once you have a plan, it is time to figure out how to make that plan come together. You will need to confirm a time and a place to have the event (including a hosting platform for an online event), create a registration website, and start assigning planning and logistics tasks to staff members.

The RETAIN Kentucky team began planning committee meetings and booked a venue nine months prior to their planned event date. In the first three months of planning, they:

- confirmed speakers and finalized an agenda,
- compiled an email list for promotional purposes,
- developed a webinar in partnership with the Kentucky Chamber of Commerce, and
- started including references to the summit in presentations to build interest.

Accessibility Is Key

Whether your event is online or in person, consider accessibility early in the planning process. Here are some questions to consider:

- How will guests notify you if they need a specific accommodation?
- What providers in the area can provide accessibility services, such as interpreters or Communication Access Realtime Translation (CART)?
- Are the lighting and acoustics at the venue sufficient?
- Does my registration site meet accessibility requirements?
- Does the venue meet requirements set by the Americans with Disabilities Act? This includes exterior parking, access to and space within meeting rooms and restrooms, and accessibility throughout the facility.



Timeline: Nine to Twelve Months before the Event

- **Book a venue:** Hotels, conference centers, and other event venues can be booked up a year or more in advance. When selecting a venue, consider how many people you expect to attend, the format of your event, the venue's accessibility, and the cost. Also consider whether the size and layout of in-person meeting rooms meet your needs.
- **Confirm your date:** Consider venue and staff availability, holidays and religious observances, and potential weather when deciding on a date. During certain times of the year, venues may be more expensive than during others.
- **Create a plan or checklist:** Work backward from the first day of your conference to list everything you will need to do, purchase, and confirm. Assign each task a due date and a responsible person.
- **Confirm your technology needs:** Whether your event is online or in person, you will need technology to support it. Consider sound and audiovisual equipment, presentation options, and accessibility needs, like live captioning and sign language interpreters.
- **Develop your digital resources:** Consider whether your event needs its own website for marketing and registration. How will you track and communicate with people as they register? Consider designating one email address for all communications about the conference and invite attendees to use it to ask questions they may have.
- **Recruit speakers and plan presentations:** Your content will be your best recruitment tool. Great presenters and speakers can be in demand and hard to book if you do not reach out early. Have backup sessions in mind in case a presenter cancels.
- **Plan for the registration process:** The registration site can be used to collect important data about your attendees, including their accessibility needs. Consider the data you would like to collect about participants (and may need for reporting), and plan the registration form accordingly. Plan to open registration on a date that allows adequate time for attendees to obtain approvals to attend and to make travel arrangements (if applicable).

Branding and Promotion

Once you have laid the groundwork and put logistics in place, you need to start recruiting sponsors and exhibitors. A strong, coherent brand will help you do that. All your marketing collateral, including your website, social media, handouts and flyers, advertisements, email templates, and signage, should use consistent imagery.

Sponsors not only help cover some of the cost of putting on an event but also help you spread the word and get people registered. Make sure you share your brand tool kit with sponsors so they can promote your event on their channel.

Building Your Brand

A brand tool kit can help if you have multiple people or groups working on different pieces. The tool kit should include

- event and sponsor logos;
- color palette, fonts, and iconography; and
- messaging components, such as taglines, talking points, and voice (e.g., word choice and tone).

An exhibiting space can also help defray costs, and exhibitors can provide information, swag, and entertainment for attendees between sessions. Be thoughtful about the physical space you provide to exhibitors and about what organizations you invite to exhibit.

RETAIN Kentucky worked closely with the Kentucky Chamber of Commerce to set registration and sponsorship pricing and to develop branding for the Kentucky Inclusive Workforce Summit. They decided to use the branding and colors from the chamber and hosted all event content and registration on its established events website. As part of the summit, the event organizers considered hosting a job fair but decided this component would be better accomplished at a later date.



Timeline: Six to Nine Months before the Event

- **Recruit sponsors and exhibitors:** Sponsors can help defray the cost of the event in exchange for getting their brand in front of your audience. An exhibitor's space can also help offset event costs while adding value for your attendees.
- **Create a task plan:** A detailed task plan can help track deadlines for communications, materials development, and onsite logistical information.
- **Develop your branding:** Come up with a name, logo, color palette, fonts, imagery, and messaging for your event. Strong branding and messaging can help potential attendees understand your event and encourage them to participate.
- **Develop a communications plan:** Consider messaging, timing, and your budget for internal and external communications. Your plan should include emails, advertising, posters and mailers, social media, and other digital promotions.

Other Details

As your event nears, it is time to start putting plans into motion. While you may have been teasing the event on your website and social media for some time, about three to six months prior to the event is when you should launch your full promotional campaign. If you are going to have branded merchandise or swag for guests, you should order that now.

If food is part of the event, be sure a variety of dietary options are available. Also ensure that registration information captures details about dietary restrictions and food allergies.

Most of your logistics should be set, but there will always be last-minute changes as well as details

Effective Communications

Effective communications include more than just promotions. When building your plan, consider

- how to communicate with speakers and organizers;
- how to collect collateral information, like speaker biographies and headshots, handouts, and digital presentation materials;
- how to coordinate staff schedules, responsibilities, and priorities;
- how to collaborate with partners, sponsors, and exhibitors (e.g., routine meetings and additional communications as needed);
- how to conduct crisis communication to handle last-minute needs; and
- what to include in and the proper format for the attendee packets.

that were missed or not implemented correctly. Think about contingencies for things that might not go according to plan. What if a speaker drops out? What if there is an issue with your venue? How will you address technical problems on the ground?

The RETAIN Kentucky team and their partners held a presummit webinar to generate interest. They tracked registration through the chamber website. They budgeted for fifty scholarships, including registration fees for key potential attendees who were considered priority participants. The chamber handled most of the promotions for both the summit and webinar, with support from the RETAIN Kentucky team.



Timeline: Three to Six Months before the Event

- **Order swag and merchandise:** Printing and production can take time. Build in time to review and revise any proofs the vendor sends to minimize the chance for misprints or other issues with the final products.
- **Launch your promotional campaign:** Start advertising, social media, and other promotional efforts to get people signed up. Your campaign plan should include both paid advertising and earned media options, such as news stories about the event.
- **Create a plan for vendors and staff:** Secure vendors, volunteers, and/or staff to cover things like parking, registration, audiovisual equipment, Wi-Fi, check-in, management of speakers and exhibitors, and set up and tear down.
- **Create a risk management plan:** You should develop a list of issues that might occur during the event (e.g., speakers dropping out, technological issues, parking problems) and have plans for addressing as many of these as possible.

Finalizing Logistics

Last-minute details can make or break an event. The last few weeks of planning can feel like a blur. You need to confirm all your speakers, ensure you have the right staffing, check your technology plan, confirm setup and other details with the venue, and much more.



Timeline: One Month before the Event

- **Finalize your schedule and agenda:** Once you have confirmed your speakers, figure out your schedule and associated logistics, including breaks, room locations, and food.
- **Create a run-of-show document:** A run-of-show document is an internal schedule that lists staff tasks and timing for logistics planning. Assign specific staff to all tasks along with a time and location.

The RETAIN Kentucky team worked closely with the Kentucky Chamber of Commerce in the last weeks to ensure communications were going as planned, to confirm speakers and accessibility vendors, to draft scripts for introductions and other transitions, and to review other logistics. One week before the event date, the Kentucky Inclusive Workforce Summit sold out.



Timeline: One Week before the Event

- Do a dry run of the event:** Walk through the venue and run through key transitions. Look for opportunities to streamline and areas where attendees may get lost or confused, and ensure all staff understand where they need to be and when. Ensure that on-site staff are equipped to correctly answer attendee questions about the event and venue, and ensure all are aware of the locations of restrooms, fire exits, and session rooms. Depending on the venue layout, it may be necessary to have staff in certain areas of the meeting space to guide attendees. The event's run-of-show document should be used to guide the dry run and should be updated before the event as needed.
- Compile materials:** Ensure you have all handouts, name badges, and other attendee materials printed and assembled. Gather digital materials, like presentation slides and videos, in a location and format that is easy to navigate.
- Expect the unexpected:** Have staff on hand to handle unexpected issues, and ensure that the role and expectations for each staff member are clearly communicated. When assigning staff roles, identify specific team members who will have the capacity to address unanticipated issues during the event in a calm, professional, and solution-oriented manner. Your planning will pay off but will not cover every eventuality. Be flexible and ready to pivot as needed.
- Follow up with attendees and speakers:** After the event ends, make sure to send thank-you notes to speakers and attendees and follow up on any questions or materials requests received during the event.
- Evaluate the event:** Review your definitions of success and compile metrics. Identify aspects of the planning and the event that went well and consider areas of improvement for future events.

Hosting a Successful Event

Now is the time to put your plans into action. Review your risk-management plans, run-of-show document, and other materials, and conduct a dry run to help identify potential problems and areas in need of improvement. Work with your venue to set up the event space with the appropriate furniture, signage, and technology. Confirm your needs with caterers, accessibility providers, and other vendors. Be ready to answer last-minute questions from presenters who are traveling to the event, and ensure they have a way of contacting you on the day of the event. Most importantly, be ready to address unexpected issues as they arise.

Thanks to its organizers' meticulous planning, the Kentucky Inclusive Workforce Summit was successful. A sold-out crowd of 259 people gathered at the Embassy Suites in Lexington, Kentucky, on September 13, 2023, to learn how to better accommodate workers with disabilities, injuries, or illnesses. Throughout the summer, the Kentucky Chamber of Commerce, the RETAIN team, and attendees shared social media posts. The RETAIN Kentucky team received positive feedback from attendees and their partners and almost immediately started plans for the next summit. Follow-up articles summarizing the historic, inaugural summit were released and disseminated statewide to share the story of the day with Kentuckians who have a role to play in keeping employees in the workforce.

Budget Template

This template is not inclusive of all the costs you may incur but serves as a guide to get you started in your planning. Examples of other costs include accessibility vendors like interpreters and Communication Access Realtime Translation (CART), printing, badges and participant packets, and promotional items. Remember to account for staff time.

Category	Item	Estimated cost	Actual cost	Difference
Expenses: Venue				
	Venue rental			
	Equipment rental			
	Taxes and fees			
	Decor			
	Signage			
Subtotal				
Expenses: Catering				
	Food			
	Beverage			
	Catering staff			
	Other			
Subtotal				
Expenses: Promotion				
	Website hosting			
	Advertising			
	Production			
Subtotal				
Expenses: Speakers				
	Speaker fees			
	Travel			
	Lodging			
Subtotal				
Grand Total				



Kentucky is participating in RETAIN (Retaining Employment and Talent After Injury/Illness Network) to build connections and improve coordination among employers, health care providers, and other key parties to help workers with new injuries and illnesses stay in the workforce. The Kentucky Office of Vocational Rehabilitation leads RETAIN Kentucky, together with the University of Kentucky Human Development Institute and committed project partners, including the Council of State Governments. The U.S. Department of Labor, in collaboration with the Social Security Administration, sponsors RETAIN.

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