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Guided Toolkit for Virtual Programming

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Guided Toolkit for Virtual Event Planning

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School of Communication

Honors Research Project

Submitted to

The Honors College

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Guided Toolkit for Virtual Event Planning

Abstract

The Coronavirus pandemic that has occurred over the last year was a major detriment to the entire world. COVID-19 caused businesses to shut down, people to shelter in place, and restricted in-person gatherings. Specifically, in the event coordinating profession, planners had to pivot their thought process and change how they saw their careers. Virtual events became a reality for most, but some were unsure of where to start the transition.

This research focuses on the importance of continued programming, even virtually, in order to keep positive relationships alive and encourage participants to be engaged from their homes. It also creates a physical guidebook resource for event planners to understand the differences in the event planning process with virtual events. The content in the guidebook takes the five event planning content areas and adapts them to what is necessary for a successful virtual event.

Guided Toolkit for Virtual Event Planning

Description and Rationale

The premise of my honors research project is to create a guided resource and toolkit for virtual event planning. Due to the COVID-19 pandemic, event coordinating as we know it has changed drastically. Not having the ability to hold in-person events and programs has created a barrier to interpersonal interaction with others and made it difficult for organizations to market and get themselves involved with the public. The last two years I have spent my time studying event planning and coordinating a team. I currently hold a position with the Department of Residence Life and Housing at the University of Akron where I program events for students that live in the residence halls. Our staff of student leaders are familiar with putting together in-person event calendars and interacting with students directly. Since March, I have been researching and learning how to program virtually for college students while maintaining a level of engagement and interactivity. Virtual programming is a brand-new idea for most, and I wanted to create a helpful guide to make the process a little easier.

A few questions I asked myself while I researched are: how can current event planning theories be adapted to fit the context of a virtual program without losing its impact? What are the key concepts to be aware of when putting on a virtual program you otherwise would not need to consider when planning an in person event? How do you market a virtual program effectively to gravitate an audience's interests? And what are the proper steps to creating an engaging virtual program? These questions are in depth and align perfectly with concepts I would like to be in the toolkit. This resource is editable and customizable to fit any organization or business looking to create a virtual event.

Review of Literature

Introduction

Prior to the start of 2020, virtual programming was not the first option considered when putting together a traditional event. In fact, in many cases it was the last option. Platforms such as Zoom, Microsoft Teams, or Google Meet were used more frequently for remote working and video calls with business professionals around the world. Now, during the COVID-19 pandemic, virtual programming has become the only option for programming in any context. Events that would have typically been in-person have been scrapped and turned into an online experience, and event planners have had to reinvent the wheel as far as coordinating is concerned.

Virtual programming and event planning is a more recent concept, but there have been case studies published that provide helpful information. COVID-19 caused the safety of people in large groups to be compromised. Since February 29, 2020, the United States has had over 27 million cases of the Coronavirus and almost 500,000 deaths (Centers for Disease Control and Prevention, 2020). Those devastating numbers were enough to shut down states and prohibit in person gatherings and events for a period of time. The Centers for Disease Control and Prevention (CDC) recommends that in order to limit exposure to the virus, people must be standing at least six feet apart and be wearing facial coverings (Centers for Disease Control and Prevention, 2020). The CDC also suggests that event planners should focus on the ability to limit contact between people rather than focusing on an ideal number of people in a room. For event planners, keeping attendees safe should be the first priority, which is where the concept of virtual events comes into play. Virtual programs and events take away the concern of people having face-to-face contact and risking disease exposure. Event planners across the country had to adapt to policies and procedures set by state and federal governments like social distancing, mask

wearing, and limiting group gathering numbers. This literature review will discuss several sources of information that have given event planning industries a framework and basis for their work and have prepared planners to adapt to the virtual world.

Effects of COVID-19 on In-Person Gatherings & Case Studies

The onset of COVID-19 quickly debilitated companies and organizations around the globe. The pandemic made it impossible to gather in-person for risk of exposure to the virus, but leaders around the world were determined to come up with an alternative. In the heat of the pandemic, Urologists in the European Association for Urology were forced to postpone and cancel congressional meetings about their research. This put medical research to a halt, damaged economic societies and relationships in the field (Porpiglia, et al., 2020). In order to solve these significant issues, doctors attempted to hold these meetings virtually. Available technology now allows interactive videos to collect data from attendees, improved quality (video and audio) for visual experience, and ability to host webinars. Utilizing this highly efficient technology gave doctors the opportunity to continue their research studies by allowing them to “deliver the same scientific contribution as at a live event without the need to move from their workplace” (Porpiglia, et al., 2020). Completely web-based events are possible, it is just a matter of figuring out what works best for your attendees. Urologists in Europe believe that a “union between people and technology should be created”, leading to hybrid events in the future (Porpiglia, et al., 2020). With the unlimited potential of technological development, anything is possible. The COVID-19 pandemic forced a major change in how research is conducted in a way that was long time coming. “The similarly rapid evolution in how scientific meetings are conducted should likewise have long term benefits” that, in the future, will help unify technology and sociality (Porpiglia, et al., 2020).

Virtual events, programs, and meetings create a more flexible schedule in people's lives. There is no need to worry about food, travel, or intricate itineraries that come with most in-person conferences and events. While there is an aspect of social interaction that is taken away by this, there are other ways to supplement events to compensate for what the pandemic took away. The cover article for 4Imprint's fall 2020 magazine called *Amplify* discusses the Headwaters Regional Development Commission in Bemidji, Minnesota and their transition from an in-person conference to the virtual world. A few of the suggestions presented in the article included: replicating reasons to attend the virtual event, catering to the audience's needs, picking the right platform, testing the technology you are using, and getting in touch to stay in touch with your audience (Patterson, 2020). Virtual events make it more difficult to connect with others, so it is important to be consistent in communication; be over the top. By making the audience a priority and having the desire to create an authentic virtual experience, attendees will be more receptive to the information being handed to them. The Headwaters Regional Development Commission made it a priority to wear uniforms in meetings and on virtual calls to maintain a level of professionalism that has always been their standard. They also make it a priority to listen to their audience's needs to increase participation. This means recording live events for people to watch later, offering shorter lectures, and eliminating screen fatigue. There are still possibilities for technical problems, so organizations should test all virtual rooms and platforms prior to the event and expect questions from attendees. All in all, "the goal for any event planner – virtual or in-person – is to ensure attendees have a memorable experience" (Fall 2020 Amplify Magazine: Shifting to Virtual Events, 2020). Virtual event planning is continuously adapting as new technology emerges over time.

Defining Event Planning

Leeanne M. Bell McManus' book titled *Event Planning: Communicating Theory and Practice* defines event planning as, “a communicative process in which a person plans and coordinates the celebration of an occasion or forms a gathering at a specific location where attendees can learn, socialize, conduct business, and/or serve the community” (McManus, 2016, p. 4). The author of this book also stated, “as an event planner, it is your responsibility to continually learn about the changing trends in the industry” (McManus, 2016, p. 4). As a consequence of COVID-19, the increased trend toward remote work and social lives has changed the face of event management. Event planners have had to research ways to hold online meetings, fundraisers, galas, book readings, weddings, and other large special occasions.

In Judy Allen's book, *Event Planning*, she goes into detail what is necessary for a successful event. More specifically, she describes five parts of an event vision that are imperative to the whole planning process (Allen, 2009). The event vision includes five design principles: elements, essentials, environment, energy, and emotion. These principles are important to the overall development of the event, whether virtual or in-person. Is it essential that event planners take these five principles into consideration when planning a virtual event. I have expanded on each of the five principles below:

1. Elements – *All of the parts that make up the event* – These are the big picture ideas that the event planner visualizes their event having. The elements include transportation of guests, accommodation of guests, shipping of items, cost of labor and staffing, and teardown of the event. For a virtual event, it would also include the virtual platform, online registration costs, and the important people behind the camera making the magic happen. Here, a timeline of how the virtual event will run can also be highlighted.

2. Essentials – *The “must-haves”* – These are the nonnegotiable pieces of the event. These include hard costs such as transportation, lodging, and venue costs, and items, decorations, and more that would help make the event meaningful and memorable. Specific technical software, registration software, camera set ups, and other virtual “must haves” will need to be included as well.

3. Environment – *The venue and style* – The environment can be broken down into the venue and the style. For a virtual event this will look different, but an event planner will still need to choose a virtual platform that meets all of their needs for the event. The style can be traditional, classic, modern, country, cultural, formal elegance, casual elegance, romantic, fun, intimate, outdoor, themed, seasonal, holiday, beach, sports, etc. Choosing the right style for the virtual event will impact how the energy is created throughout.

4. Energy – *The mood you will create* – What the event planner chooses to do for the elements, essentials, and environment will help set the mood for the event. The energy at events are normally positive or negative, and making the right decisions about the room size, the layout, and the other elements, will help keep the energy positive. In a virtual environment, it is considerably more difficult to keep energy up since attendees are not as engaged. The energy in a virtual event can be kept up by creating sessions that are gravitating, interesting, and interactive.

5. Emotion – *The feelings your guests should have* – The emotion of the event should be a direct effect of the style and theme the event planner chooses for their event. The four other event principles play into the emotions that will be created by attendees.

Each of these five design principles in creating an event vision can be adapted to fit the necessities of virtual event planning by substituting a lot of the venue information and replacing it with virtual platform subscriptions and digital advertising. In addition, the energy and emotion will need to be increasingly higher while on camera rather than in-person. The transfer of

information through a screen can be delayed and more difficult, so it is important to make the emotion and energy of the virtual event a priority.

Importance of Events

McManus' *Event Planning: Communicating Theory and Practice* goes into great detail about every sector of event planning, how it connects to communication theories, and how to practice that in the workforce (McManus, 2016). Event planning is a universal concept whether it be in person or online, so the concepts mentioned in this book can be adapted to fit the online paradigm that is now a reality for the unforeseeable future. Interpersonal communication is at the center of an event planner's job, making communication a vital skill for success. Theories like The Theory of Interpersonal Communication Motives (ICM), Uncertainty Reduction Theory (URT), and Social Exchange Theory (SET) make the relational aspects of events a crucial part of the event experience.

James Armstrong's workbook series, *Planning Special Events*, puts communication practices in effect with a guided workbook of forms that help event planners (or anyone planning a special event) make sure to hit every necessary detail (Armstrong, 2001). Armstrong's workbook provides a similar format to what I am intending to create for the virtual programming guidebook at the end of this project. The *Planning Special Events* workbook gives specific worksheets for one to fill out for planning any type of event. It includes sheets on the mission and vision of the event, the budget, who is responsible for what, who is in charge, itineraries, and post-program evaluations. Aventri is an event management platform that centralizes event information and branding to help increase attendance and turnout at events. In 2019, they posted an article on effective communication tips for event planning that helps reach attendees and consistently engage with them leading up to the event (Johnson, 2018). They suggested that to effectively communicate with attendees, event planners should be consistent about sending

emails, making a point to have multiple points of person interaction with attendees, and follow up with them in a timely manner after the event. This company is a reliable resource for event planners who might be new to the industry and need a little help staying organized, or for a company planning a larger corporate event.

Virtual events by no means should completely replace in-person interactions; however, it is a skill that is necessary to adapt for when that is the only option. The global pandemic in 2020 and up to the current day has turned lives upside down suddenly and did not leave a lot of time for adapting. Organizations have been forced to find alternatives through trial and error, but that did not stop them from functioning. Colleges and universities had to halt all in-person events in March 2020 when campuses closed and have been restricted with in-person interaction since then. Co-curricular activities are essential to the college experience, so completely ceasing to program was not an option. Dr. Ajaykumar Ramdas Ingale of Samarth College of Education describes the role of co-curricular activities as involving physical, moral, social, emotional, and cultural development (Ingale, 2014, p.1). These concepts are essential to student and professional development at the grade and college level and beyond, making relationships a key component. The rest of this review will go further into detail the impact virtual programming has and how to make it successful.

Communication Theories

People often do not interact with one another without a motive. There is a purpose and intention behind every interaction, positive or negative. In the event management industry, it is essential that event planners be able to gauge the intent and purpose of their audience attending whatever event they are putting on, be it in person or online. Knowing the audience's intent of attending helps event planners curate an event that meets their audience's needs. Interpersonal communication theories help event planners understand the 'why' of people's actions, and guide

planners to better communicate with their audiences. Theories like the Theory of Interpersonal Communication Motives (ICM), Uncertainty Reduction Theory (URT), and Social Exchange Theory (SET) give event planners an idea of what their audience is thinking before they think it. The purpose of any event is to cater to your audience. In order to do that you must pay close attention to what it is they are looking to get out of the event.

The Theory of Interpersonal Communication Motives (ICM) is used to, “describe important differences in why people communicate interpersonally” (Infante, 2017, p. 192). People are purposeful and mindful in their choices, and ICM is able to measure these motives with a scale. A “motive” is defined as, “an internal state of readiness to act to achieve a goal” (Infante, 2017, p.192). The scale includes categories such as: affection, control, escape, inclusion, pleasure, and relaxation to measure why people communicate interpersonally with others (Infante, 2017, p.192). As an event planner, especially a virtual event planner, it is crucial to know why your audience wants to communicate, and why you want to communicate with your audience. [MLV2] Knowing the audience well gives event planners a way to create proper communication to keep the audience engaged. If an event planner does not know what the audience wants to get out of the event, it is more difficult to meet the event’s purpose.

Uncertainty Reduction Theory (URT) can be applied in the case of event planning through the audience’s desire to have more information aside from promoting an event or having a preexisting relationship with an organization. URT is defined as, “interpersonal communication during the beginning of an interaction...The core assumption of this theory is that when strangers meet, they seek to reduce uncertainty about each other” (Infante, 2017, p. 207). When a potential attendee at an event sees promotional material or initial information for the first time, they are curious and want to learn more. That is part of the reason why promotion and advertisement is important for businesses and organizations that are attempting to reach a wider audience. As the

uncertainty is reduced in the relationship (by continuing to reach out to attendees who have signed up for such an event), their behaviors begin to be more predictable. In the case where attendees share the same beliefs, values, and attitudes of the business or organization putting on the event, they are more likely to return and continue support in the future. For a virtual event, it can be assumed that the more direct advertising is to specific audiences, the more likely the audience will be to get on board with that organization's attitudes, beliefs, and values, making their virtual event successful.

There are different theorems and motives to reduce the uncertainty in a newfound relationship between a potential attendee and an organization or business. The six theorems suggest that as certain concepts increase, the amount of uncertainty in the situation will decrease. The two that apply to event planning are:

- “The greater the nonverbal expressiveness the more intimate content, perceived similarity, and liking there will be
- The greater the real and perceived similarity between communicators in a developing relationship, the more likely attraction or liking will exist.

(Infante, 2017, pp. 208-09).”

In the context of virtual event planning, it can be assumed that if event planners place a large emphasis on creating personal content and perceived similarity with the audiences they are attracting, turn out and attendance will be successful at the event. This can also be applied to the entire event planning process with all of the hands that have a part in putting the event together. It is important that the team putting the event together has shared attitudes, beliefs, and values concerning the goals of the event or there could be dissonance between members.

Concepts that improve motivation to reduce uncertainty could be incentives, unpredictable behavior, and the likelihood of future interactions (Infante, 2017, p. 209). These

three motives make it more likely that a person would desire to pursue a closer relationship with you and continue that in the future. The same can be said about organizations in relationships with their volunteers, consumers, or audiences: people want to learn more about your business or organization, so if that relationship is pursued, they are more likely to come back in the future.

George Homans, a sociologist who developed the Social Exchange Theory, wrote an article on the theory.

“That is, the more valuable the activities that members get, the more valuable those that they must give. For if a person is emitting behavior of a certain kind, and other people do not find it particularly rewarding, these others will suffer their own production of sentiment and productivity, in time, to fall off...In short, the propositions of behavioral psychology imply a tendency toward a certain proportionality between the value to others of the behavior a man gives them and the value to him of the behavior they give him

(Homans, 1958, p.599-600).”

The theory assumes that humans tend to seek out rewards and avoid punishments. If someone experiences a relationship that is benefiting them in some way, they are more likely to continue to build that relationship. If the relationship provides negative experiences, they will be more likely to walk away. This theory is also affected by a person’s expectations walking into the relationship. If a person has had a bad experience in a relationship in the past, their expectations for that relationship to be successful will be lower. Attendees at an event are going to seek out rewards or incentives for attending that event. If there are benefits to attending a specific event, program, or conference, they will be more likely to attend again the following year. Event planners can give their attendees a positive experience by continuously pursuing a relationship with their attendees, reaching out frequently before and after the event, and keeping morals up during the event. This can translate to a virtual event by creating personalized

incentives for attendees. Rewarding attendees for high participation will keep them engaged and encourage them to come back in the future.

The Theory of Interpersonal Communication Motives (ICM), Uncertainty Reduction Theory (URT), and Social Exchange Theory are communication theories that heavily reflect on interpersonal relationships and can be translated into a virtual event context. Further into this review I will discuss how they can be put into practice realistically in order to obtain positive outcomes during virtual events.

Putting it to Practice

There are six questions that an event planner should consider when planning any event: Who are your guests? What is your event? When is your event? Where do you want to have your event? Why are you having this event? And how much is your budget? (McManus, 2016, p. 9). These seemingly basic questions are the framework for the smaller detail of the event, whether it be in person or online. Each of these questions can be further broken down to include specific details in each category. Who is the target audience? What is the mission and vision of the event? What is the purpose? Are you planning around larger holidays or sporting events? It is important to consider these small details in order to stay organized and have the best possibility of meeting the goals and purpose of the event.

Communication competence is key to a successful outcome. If an event planner is creating a virtual event, it is important they keep this in mind when planning with others. Communication competence refers to “an individual’s knowledge, skill, and motivation to accomplish a particular goal” (Allen, 2017, p. 1). These interdependent constructs are essential when working with clients and coworkers on a project; it requires you to work well with and trust others on a daily basis. Furthermore, when planning a virtual event, it is likely that meetings and other gatherings to plan the event will be virtual as well. Communication competence will

then need to be exceedingly high because it is much easier for information to be lost in translation when sending emails or sitting in Zoom meetings. This not only goes for coworkers and clients, but the audience that the event is targeting as well.

An event management software company, Aventri, listed several effective communication tips to increase engagement: calling or video conferencing instead of emailing, writing efficient emails, interacting (more video conferences), following up frequently, and call to actions (Johnson, 2018). The event planner needs to be on top of communication to make sure nothing slips through the cracks, but they also need to build a team they can trust to fulfill their duties without needing to be micromanaged. When talking about those interpersonal communication theories above, this is where they can be applied. More frequent communication and targeted marketing with potential audience members and attendees will result in them having a higher desire to attend. Oftentimes people need to see the heart and “why” behind an event or cause to be convinced to be on board.

Summary

The event planning industry has changed drastically over the last year in the midst of the COVID-19 pandemic. Not only have planners been forced to abide by COVID-19 guidelines for in-person events (social distancing, extra sanitation, smaller venue capacities, etc.), but they have also shifted away from standard practices for in-person gatherings and began holding virtual events. Holding a virtual event is absolutely not the same effect as being in person; however, the solution is not to completely cease interaction. Event planners have done an excellent job creating plans for virtual events and making them successful with their preexisting knowledge of interpersonal communication and event planning.

Although virtual event planning is still an up-and-coming concept, there are assumptions that can be made through research that already exists. Through the Theory of Interpersonal

Communication Motives, Uncertainty Reduction Theory, and Social Exchange Theory, event planners can take those theories and apply them to how they are interacting with clients and coworkers virtually on a daily basis. Importance questions that event planners ask themselves at the start of brainstorming an event can be altered to fit the virtual reality. While virtual events are not ideal, having the option and developing that skill is indispensable.

Methodology

Through research on event planning and how other organizations have done virtual programming, as well as my current experience on the topic I will assess how to create a virtual program in a series of steps. Due to the nature of the project, I do not need test subjects, just existing research to make claims and conclusions about virtual programming and how it translates from in-person events. When in-person programming is not an option, the solution is not to cease all efforts to reach others, but to strategically think of a plan to adapt new ideologies and theories of the concept. This toolkit will be able to be adopted to a college programming board, or any other organization that wishes to communicate well via a virtual platform.

Outcomes

The final outcome of this project is a printed copy of the guided toolkit (see Appendix). The idea was to create a physical workbook that one can write in and keep for personal records. This guidebook is organized with different tabs and sections for each concept involved in event planning. It is presented in a way that is easy to understand and navigate for someone who has maybe not learned the official theories and terminology. This project will be available to anyone who would like to view and utilize the material.

Academic Impact

The final guided toolkit for virtual event planning furthers the current research that has been done about in-person event planning. In several classes in the School of Communication, I have studied interpersonal and intercultural communication theories that are applied to event planning fields. Although I have not taken an official event planning course, I have attended several college programming conferences representing the University of Akron where I have learned the steps of event planning and how to properly execute every moving part. The material and resources integrated into this guided toolkit will assist me in my knowledge of event planning and further my passion for the career and give me knowledge I can take with me wherever I am employed after graduation.

Reflection

Through the creation of this virtual event planning guidebook, I have gathered many alternative event options to in-person events. While virtual events should not be a permanent fix, I believe that while the pandemic is around it is essential to learn how to work around it. The solution cannot be to cease planning events in its entirety, but to adapt to the situation. I enjoy event planning and have quite a bit of experience in virtual event planning. One of my goals with this project was to expand on my existing knowledge of event planning to create an interactive resource for event planners. With virtual event planning being an incredibly new concept, I wanted to consolidate my knowledge into one document that would walk someone through the entire planning process.

The research process was lengthy, yet incredibly rewarding and informative. Throughout my research I was able to learn how other businesses and organizations were functioning during the pandemic. This was especially helpful for this project to know what essentials needed to be

included in the guidebook. I discovered the idea for a guidebook when reading through James Armstrong's book, *Planning Special Events*, where he provided many fill-in-the-blank resources. This gives the reader the ability to apply the knowledge they are learning, and curate it to the specific event they are planning. With the virtual planning guidebook, organizations and event planners can do the same by following the event planning process and inserting the unique information for their virtual event.

While there is not data yet about the success of the virtual event planning guidebook, the book is well put together, organized, and includes all of the necessary information for establishing a virtual program. Utilizing Canva, an online graphic design space, gave countless resources for the organization of the guidebook. Each of the seven chapters highlights a different aspect of virtual event planning and includes space to fill in event information. The guidebook is also converted into an editable PDF so that event planners can insert their unique event information digitally without needing to print the guidebook out.

The overall goal of the guidebook is to give event planners a consolidated location for all of their virtual event information and help them account for every detail. I am finishing my term as President of Residence Hall Program Board in the Department of Residence Life and Housing at the University of Akron, and this would have been useful at the beginning of the academic year. As President, I am essentially responsible for planning larger scale events for on-campus residents. When COVID-19 swooped in a restricted in-person gathering I was not sure how my organization was going to function. Working on this research project throughout the year helped me discover new and innovative ways to transfer our in-person events virtually. I hope that this guidebook can be of help to event planners in the future, even past the pandemic.

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Appendix

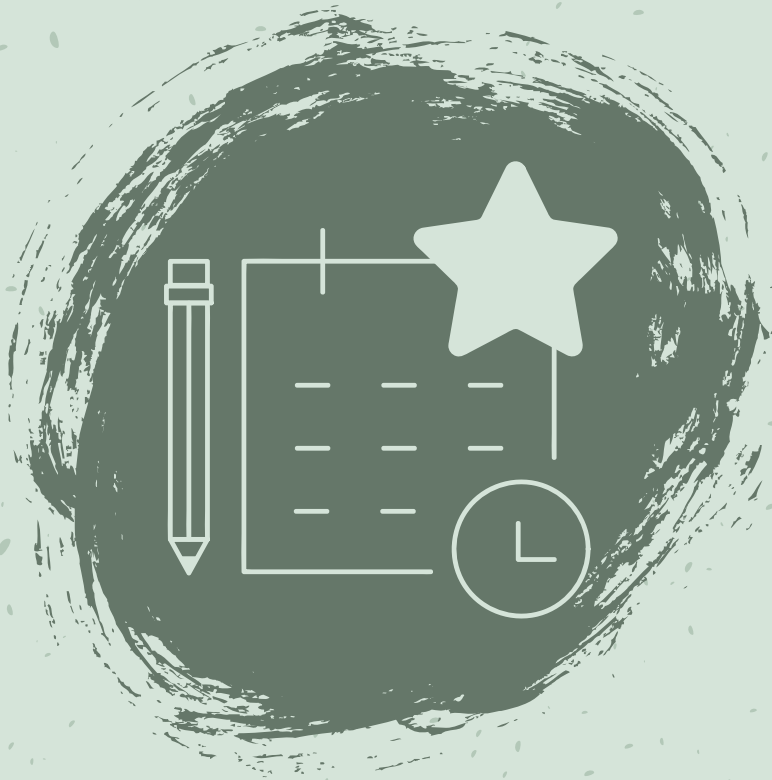
Project: Virtual Event Planning Guidebook

Sienna McArthur

The University of Akron

Virtual Event

planning in a
pandemic



Sienna McArthur

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Author's Message

My goal for this guidebook is to provide a key resource for event planners to expand their knowledge about virtual event planning. The COVID-19 pandemic shifted the way we see events and I hope that planners find this useful!

– Sienna McArthur

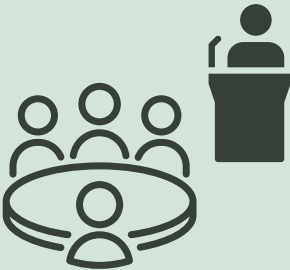
Preface

An Introduction to this Guide

Preface An Introduction to this Guide

Welcome!

This guide is for all the event planning gurus looking for a way to keep all of the details of their events in one concise location with additional resources to help them. The Coronavirus Pandemic that went on throughout 2020 and 2021 put a wrench in most in-person event planning and forced event planners to learn how to take their careers online. The purpose of this guide is to be a resource for those who have been tasked with putting together a virtual event and don't know where to start. This guide will walk you through all of the steps to virtual event planning and how to ensure a positive outcome.



Each chapter discusses a different part of the virtual event planning process and even includes worksheets to fill in the information about your particular event. This guide will be your friend as you put together your virtual event!

"The solution for event planners was not to just stop all programming and planning, but to adapt to the situation at hand and create a way to events to be able to move on."

Preface

An Introduction to this Guide

What is Event Planning?

So what is event planning? By definition, event planning is “a communicative process in which a person plans and coordinates the celebration of an occasion or forms a gathering at a specific location where attendees can learn, socialize, conduct business, and/or serve the community” (2016, p. 4). That is a lot of words, but the standout word in that definition is “communicative” or communication. An event planner is the main communicator in putting together some sort of gathering for people to make connections with each other.

How Has the Pandemic Affected Event Planning?

The Coronavirus really put a wrench in event planning as we knew it in the past. At the start of the pandemic, the Center for Disease Control (CDC) suggested states put a halt to in-person gatherings and put a restriction on how many people could be in the same space at the same time. Many businesses and organizations were affected by this because they had to postpone or cancel anything they had planned.



- Avoid large events and gatherings, when possible.
- Consider the level of risk when deciding to host an event.
- Promote healthy behaviors and maintain healthy environments to reduce risk when large events and gatherings are held.
- Be prepared if someone gets sick during or after the event.

Center for Disease Control and Prevention, 2021

Preface An Introduction to this Guide

How Does Virtual Event Planning Comes into Play?

While some simply cancelled events to reschedule when it was safe to be back in person, some also decided to pivot their events to an online platform and keep moving on. Microsoft Teams, Zoom, and Webex became leading platforms for virtual meetings,



classes, and events. The solution for event planners was not to just stop all programming and planning, but to adapt to the situation at hand and create a way to events to be able to move on.

Chapter One

Where to Start

Chapter One

Where to Start

The first details that you should set in stone before moving on is the time, date, and "virtual" location of the event. Without these details, it will be difficult to plan anything else! Fill in the details in Figure 2.1 below.

Figure 1.1

Details of the Event:

Name of the Event: _____

Date: _____

Time: _____

Virtual Platform: _____

Objectives & Goals

The goals and objectives you create for your event will help with the planning process. By defining these two details, you can then decide which platform will best suit your event, and how you will reach these goals. It is important that the objectives of your event are broader



than your goals, and your goals include SMART (specific, measurable, attainable, realistic, and timely) criteria. Use the figure on the next page to help you form your objectives and goals for your upcoming event.

Chapter One Where to Start

Take a moment to fill in one objective for your event and three goals to help meet your objective.

Figure 1.2

Determining your objectives and goals:

Objective:

1. _____

Goals:

1. _____
2. _____
3. _____

Event Platform

Some online platforms have different features, so you may want to look into what each one offers. There may be a feature you need more than others, like the webinar feature, or ability to make virtual backgrounds. If you have specific requirements you need a platform to meet, list those on the next page and make an educated decision on the platform you choose to use.



Chapter One Where to Start

Figure 1.3

List the specific needs for your virtual event and select the platform(s) that meet(s) your needs.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Which Platform?

- Instagram Live
- Facebook Live
- Zoom
- Webex
- Microsoft Teams
- Other:

Ask Yourself:

Do you need the ability to share your screen?
Create virtual backgrounds? See other attendees?

Chapter One Where to Start

Budget

Money doesn't grow on trees, so event planners need to be aware of what kind of budget they are working with. This is an important conversation to have with a company or organization right off the bat to avoid overspending. Once you make a budget, stick to it so you avoid going overboard.

Figure 1.4 shows a sample budget and suggests categories of expenses to include. Use Figure 5.1 in Chapter 5 to create a budget for your virtual event!

Figure 1.4 Sample Budget

BUDGET FOR [Name of event]					
				Estimated	Actual
Total income				\$0.00	\$0.00
Total expenses				\$0.00	\$0.00
TOTAL RAISED				\$0.00	\$0.00
INCOME					
		Estimated	Actual		
Event proceeds					
Entry fees					
Ticket sales					
Other income					
Totals		\$0.00	\$0.00		
Extra sales					
Auction					
Raffle					
Sales of photographs					
Sales of merchandise					
Totals		\$0.00	\$0.00		
Donations					
Donations					
Totals		\$0.00	\$0.00		
EXPENSES					
		Estimated	Actual		
Site					
Equipment hire					
PA, audio visual					
Permits, licences					
Virtual Platform Software					
Site staff					
Online Registration Software					
Decoration					
Balloons					
Banners and signs					
Flowers					
Lighting					
Table centres					

Chapter One Where to Start

Figure 1.4

Sample Budget Continued

Totals	\$0.00	\$0.00	Totals	\$0.00	\$0.00
Prizes			Program		
Auction items			Marshalls/staff		
Goodie bags			Other production costs		
Ribbons, trophies			Performers		
Thank you gifts			Speakers/MC		
Certificates			T shirts/clothing		
Totals	\$0.00	\$0.00	Team signs/numbers		
Promotion			Travel/transport		
Advertising			Totals	\$0.00	\$0.00
Distribution			Miscellaneous		
Graphic design			Couriers		
Paper/stationery			Fuel		
Photocopying			Insurance		
Photography			Phone calls		
Postage			Other fees		
Printing			Volunteer expenses		
Website			Totals	\$0.00	\$0.00
Totals	\$0.00	\$0.00	WISH LIST ITEMS		
WISH LIST ITEMS					
Totals	\$0.00	\$0.00			

Chapter Two

Your Virtual Event Vision

Chapter Two *Your Virtual Event Vision*

Now that you have the basic details set in stone for your virtual budget, you can start to visualize how you would like everything to play out. There are five different sections to planning your virtual event vision: the elements, the essentials, the environment, the energy, and the emotions. Each one includes an important factor you will want your event to include in order for your event to be successful and impactful for your attendees.

The Elements

Step back and think about the big picture of your event. Look at the event requirements that carry hard costs and need to be part of your virtual platform. This will play into the budgeting, timing, logistics, and orchestration of your entire event because each element affects the next. For a virtual event, this will look considerably different than an in-person event would.

Create an outline of event elements and visualize how the event will truly play out. Use the figure below to help you think about the timing of how everything will play out. There is space on the next page for you to create a list of required elements you need for your virtual event to make sure things run how they should.

Remember!

The more time you leave yourself to plan, the better. There are many decisions that need to be made far ahead of your event date.

Chapter Two Your Virtual Event Vision

Figure 2.1

List of Required Elements to Your Event
(i.e. speakers, artists, vendors, etc)

Figure 2.2

Create a timeline of events for your virtual event.
Hint: Always keep a calendar on hand for planning!

Time:	Session/Task:	Time:	Session/Task:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Chapter Two Your Virtual Event Vision

The Essentials

Think about the essential needs versus the wants you desire to have included in your virtual event experience. Don't forget to include hard costs such as a specific software or subscription for the virtual platform, technical equipment to make the magic happen, software for registration, etc. Don't forget to include these pieces in your budget!

As you think about the essentials, also keep in mind options for enhancements for your virtual event that could be considered depending on where your budget lands.

Figure 2.3

List out your needs and your wants for your event.

NEEDS

WANTS

Chapter Two Your Virtual Event Vision

The Environment

As you are looking for virtual platforms to host your event, think about the style you are going for. Will it be in a webinar format where attendees cannot see one another? Does it need to be on Zoom or a similar platform to have breakout rooms? Think about these logistics as you decide what kind of virtual environment you want your attendees to experience. Fill out the section below with the details of your virtual event environment.

Figure 2.4

Fill in your event details.

VIRTUAL LOCATION _____

TIME _____ DAY(S) _____

MULTIPLE EVENT LINKS? Yes or No?

Next, decide what kind of virtual event style you are trying to achieve. This will influence what the rest of your promotional materials and websites looks like, guest attire, music, entertainment. Circle a couple of event styles listed on the next page to help keep you on track.



Chapter Two Your Virtual Event Vision

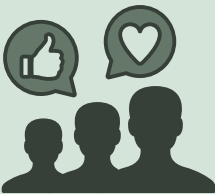
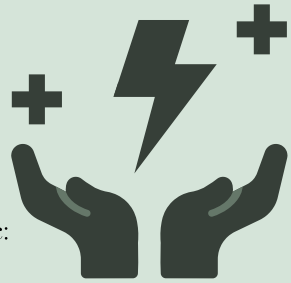
Figure 2.5

Circle one or more event styles for your virtual event

- TRADITIONAL
- CLASSIC
- MODERN
- COUNTRY
- CULTURAL
- FORMAL
- CASUAL
- ROMANTIC
- OTHER _____
- _____
- _____

The Energy

How will you keep up the positive energy throughout your event? You will lose some percentage of energy levels just communicating through a computer screen; how will you compensate for this? There are so many factors to consider in keeping your virtual event energetic: usability of the website and promotional materials engagement/interactivity of content, length of sessions, and the type of guests you have. All of these factors contribute to the energy in the "virtual" room and the mood being set.



Make sure you do a test run of all the technology involved in the virtual event prior to the event taking place. One thing that can be incredibly frustrating for virtual attendees is not being able to get technology

Chapter Two Your Virtual Event Vision

to work (on your end, at least). You will want to do a dry run of the larger events about a week before the event launches to make sure you have ample time to iron out any issues. For smaller events, a couple of days would be enough time since there wouldn't be as many people logged on at the same time. Technology is hard, but don't let that barrier keep you from reaching your people!

In the section below, brainstorm how you will keep the attention of your audience throughout the virtual event. Consider how positive energy will be established and sustained throughout the event.



Think about virtual break out rooms, video sessions, and group discussions. These interactive elements will encourage more participation and engagement.

Figure 2.6

How will you keep positive energy up during this virtual event?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Chapter Two Your Virtual Event Vision

The Emotion

Think through what emotions you want your event style to convey. What feelings do you want to bring out in your guests? Your event style will contribute to the spirit your event gives off, so choose one that captures the positive energy and makes your event memorable! In the section below, list a couple of emotions you would like to provoke in your attendees at this virtual event.

Figure 2.7

What emotions do you want your attendees to feel?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Now that you have created the basic structure for your virtual event, let's discuss in the next chapter who you are going to be inviting and how they will register for the event.

Chapter Three

Guest List & Registration

Chapter Three

Guest List & Registration

Think about WHO you are directly targeting with this virtual event. Is it your small business team? Or is it a larger virtual conference with many individuals? This will play into how you create your promotional materials.

Write below the kind of audience you are targeting for this virtual event.

Figure 3.1

What group of people are you targeting?

_____	_____
_____	_____

Online Registration

What platform are you using for registration? Will it cost attendees? You will also need to know if there is a capacity of how many people can access your virtual event at the same time. Be sure to check out the different subscription options when you purchase your virtual platform to hold the number of attendees you need.

If there is a limit to the number of attendees that can register, be sure to indicate this on your online registration platform. If it is going to cost people money to register, find out what percentage of those funds is going back to the software company.

Chapter Four

Detailed Event Itinerary

Chapter Four Detailed Event Itinerary

Now that you have your guest list solidified and your guest registration platform ironed out, you can start to put together your detailed itinerary for the event. Here, you will need to think about how the event will unfold from set up through tear down. How many people do you need assisting you? And where?

Include your detailed event itinerary from start to finish here. You may also want to include the names of who is in charge of these sessions so you know everything has been accounted for and delegated. Think of this as a master copy of your event itinerary where you see all of the working parts in alignment with the schedule of events.

Figure 4.1

Detailed Event Itinerary – Master Copy

Session Name/Time

Point Person(s)

Chapter Five

Promotional Materials

Chapter Five Promotional Materials

The promotion and advertising of your virtual event is crucial to its success. These methods will make people aware of your event and convince them to attend. Following your budget, create a promotional plan. What types of promotion do you need? Do you need apparel for your core planning team? Are you looking to post a commercial on radio or broadcasting? Do you need to hire a graphic designer to create some of these things?



Social media marketing will also be super helpful for advertising a virtual event. In a digital world, most people frequently use social media sites like Facebook, Instagram, Twitter, and Snapchat. Use this to your advantage! Create a business account on the platforms you think will have the most traction, or advertise straight from your company account where your followers already reside. The business account will allow you to see the insights on each platform to analyze your engagements and interactions to curate the best content you can for your audience. Intentionally build a content calendar that spreads out frequent postings about your virtual event.

Promotional Materials to Consider:

- Graphic design: flyers, handouts, posters
- Photography
- A website
- T-shirts
- Signage
- Social media channels

Chapter Five Promotional Materials

You may want to consider hiring a social media coordinator for this task, as it can be time consuming for some companies or organizations that are larger scale.

In the figure below, take time to think about which promotional materials and advertising methods will benefit your organization's event and why. Think carefully about who you are attracting and why some methods would work better than others.

Figure 5.1

Promotional Materials & Advertising

Check mark the methods of promotions and advertising you would like to use for your event below:

- | | |
|---|---|
| <input type="checkbox"/> Selling Merchandise | <input type="checkbox"/> Word of Mouth |
| <input type="checkbox"/> Broadcasting Commercials | <input type="checkbox"/> Newspaper/Magazine Ads |
| <input type="checkbox"/> Social Media & Contests | <input type="checkbox"/> Email Newsletters |
| <input type="checkbox"/> Paper Flyers & Mailers | <input type="checkbox"/> Other _____ |

Why did you choose these methods over the others?

Chapter Six

Budget

Chapter Six Budget

Use the space below to create the line item budget for your virtual event based on the sample provided in Chapter 2. Refer back to figure 2.1 if you need to.

Figure 6.1 Your Budget

BUDGET FOR [Name of event]					
				Estimated	Actual
Total income				\$0.00	\$0.00
Total expenses				\$0.00	\$0.00
TOTAL RAISED				\$0.00	\$0.00
INCOME					
	Estimated	Actual		Estimated	Actual
Event proceeds			Sponsorship		
Entry fees			Major sponsors		
Ticket sales			Minor sponsors		
Other income			Other sponsors		
Totals	\$0.00	\$0.00	Totals	\$0.00	\$0.00
Extra sales			Donations		
Auction			Donations		
Raffle					
Sales of photographs					
Sales of merchandise					
Totals	\$0.00	\$0.00	Totals	\$0.00	\$0.00
EXPENSES					
	Estimated	Actual		Estimated	Actual
Site			Decoration		
Equipment hire			Balloons		
PA, audio visual			Banners and signs		
Permits, licences			Flowers		
Virtual Platform Software			Lighting		
Site staff			Table centres		
Online Registration Software					
Totals	\$0.00	\$0.00	Totals	\$0.00	\$0.00
Prizes			Program		
Auction items			Marshalls/staff		
Goodie bags			Other production costs		
Ribbons, trophies			Performers		
Thank you gifts			Speakers/MC		
Certificates			T shirts/clothing		
			Team signs/numbers		
Totals	\$0.00	\$0.00	Travel/transport		
Promotion			Totals		
Advertising			\$0.00	\$0.00	
Distribution			Miscellaneous		
Graphic design			Couriers		
Paper/stationery			Fuel		
Photocopying					

Chapter Six Budget

Figure 6.1 Your Budget, continued

Photography			Insurance		
Postage			Phone calls		
Printing			Other fees		
Website			Volunteer expenses		
Totals	\$0.00	\$0.00	Totals	\$0.00	\$0.00
WISH LIST ITEMS					
Totals	\$0.00	\$0.00			

Chapter Seven

Post-Evaluations

Chapter Seven

Post Evaluations

Your event has concluded! Woohoo! Finishing an event after countless hours of planning can be bittersweet, but such a relief. Now it is time to reflect on how the event ran, what didn't go so well, and what you can change for later. By reflecting on the conclusion of your event, you can identify ineffective methods being used the next time the situation arises.



Another way to reflect on an event is to collect feedback from the people who helped execute the event and those who attended. The more feedback you have, the better. Use this feedback to help figure out what worked and what didn't.



For your virtual event, take a look at the attendance numbers compared to the number of people who were invited/your target population. If your numbers were lower than you expected, evaluate the time of day/year your event occurred and make sure your promotional materials were launched early enough and that you didn't conflict

with other major events or holidays.

If your event was raising money for a cause, did you meet your goal? Why or why not? Was there enough opportunities or platforms for people to donate?



Chapter Seven Post Evaluations

Figure 7.1 Post-Event Evaluation

Did the virtual event meet your goals and objectives?
Why or why not?

If you didn't meet your goals and objectives, what can be done next time?

Total Registration: _____

Total Attendance: _____

Will you send out a survey? Yes or No

Evaluating your virtual event planning strategies will help you learn from methods you are using, and help you adapt new methods for next time you plan a similar event. Use the figure above to write out your thoughts on how the event went, and what your evaluation is overall.