# Event Planning in MNsure Outreach

**Session Objectives**

* Equip participants to carry out successful events through careful planning of event logistics, turnout, execution, and follow-up.
* Help participants understand event planning and execution as a valuable outreach tool.

**Training Materials**

* Visual aid (PowerPoint and projector)
* Event Plan Template (1 per participant plus in packets plus 1 per small group)
* Sample Materials Check List (1 per participant in packets)
* Event Planning Scenarios (1 scenario per small group, handed out during training)
* Event Planning Tip Sheet (1 per participant in packets)
* Flip chart, easel, and tape
* Blank flip chart pages (1 at each small group table and 4 taped to the front wall)
* Markers (1-2 at each small group table)

**Room Setup**

Participants should be seated at tables that accommodate 3-5 people each. Ample wall space is also recommended in order to tape up several flip chart pages.

**Topics Covered**

* Events as an Outreach Tool
* Establishing the Basics
* The Nuts & Bolts of Event Planning
* Writing an Event Plan
* Event Planning Exercise

**Facilitator Notes**

This session is 2 hours. It is discussion and exercise-heavy. While directions for facilitating each discussion and exercise can be found under “Section Notes”, please note that some cues do exist (in bracketed italics) within the Facilitator Scripts themselves. When appropriate, the facilitator should share examples and solicit stories from participants. It’s important, however, to understand the dynamic of the room; that is, if the group is a mix of metro and Greater MN assisters, ensure that stories are being shared are from all areas of the state.

**WELCOME & INTRODUCTION**

**(5 minutes)**

**Section Notes**

*In this section you should introduce yourself and the agenda for the day. It’s recommended that you share some information about who you are (e.g., where you live, what your favorite part of your job is, a fun fact, etc.). Once you have introduced yourself, preview the session agenda, the location of the training space amenities, and encourage people to participate fully.*

**Facilitator Script**

* Hello everyone, and thank you for coming! My name is *\_\_\_\_\_\_\_\_\_\_* and I am the *[title]* at *[organization].*
* Welcome to our session on Event Planning! Today we are going to learn about why events matter in MNsure outreach, and we will dig into some best practices in both the planning and execution of effective outreach events.
* During today’s session we will:
	+ Discuss why events matter in outreach
	+ Cover the nuts and bolts of event planning
	+ Conduct an event planning group exercise
* There are a few things I’d like to point out before we get started:
	+ Bathrooms are located \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ If you’d like to grab some refreshments, they are located \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* I also want to encourage everyone to participate as much as they can today. There is a lot of wisdom in this room, so the more people participate, the more we all will learn!

**ICEBREAKER & GROUP INTRODUCTIONS: “THE BEST EVENT”**

**(15 minutes)**

**Section Notes**

*Participants should pair up with a partner they don’t know well, introduce themselves, and share highlights of the best event they’ve ever attended: what made it great and what could have made it even better. Once partners have shared, ask for volunteers to tell the large group about the events they and their partner discussed.*

*As each person shares, be sure to note themes that you can build on throughout the session. For example, take note of the following: great publicity; great space and decorations; was well organized or ran smoothly; they felt welcomed; had fun energy; was inspiring; etc. You can also track some of these themes on flip chart paper and tape the sheets to the wall.*

*Next, discuss as a large group the qualities of bad events people have attended. Point out that events tend to stick out in our minds when they are really great, or really bad, and often it is the planning that will make or break an event.*

**Facilitator Script**

* Part of the power of effective outreach is the connections that we make with each other. We are going to start today’s session by learning more about one another and the things we look for in a good event.
* First, I’d like you to find a partner you don’t already know well! *[Give participants a minute to pair up.]*
* Take 2 minutes to tell each other who you are, what your role is at your organization, and one thing you’re hoping to learn more about in today’s session.
* *[Give pairs 2 minutes or until you feel they’ve shared adequately or chatting dies down.]*
* Now think of the last really great event you attended (it can be anything!), and tell your partner about that event. What made it great? What could have made it even better?
* *[Give pairs 5 minutes or until you feel they’ve shared adequately or chatting dies down.]*
* Who would like to share with the large group what you and your partner talked about? *[Call on a few volunteers until you get a good variety of responses.]*
	+ What made the events you discussed great?
	+ What aspects of the event did you wish had been done better?
* Thanks for sharing! Now, I want to talk as a group about some of the bad events you’ve attended. Who here has ever been to an event that wasn’t so great? *[Almost all will likely raise their hands.]*
* What made the event bad? *[Tease out several answers from participants.]*
* The stories we just shared illustrate how much a really great event can leave a lasting impression on us. However, they also show that a really bad event can do just the same.
* Many of the items that you all shared as making these events really good or really bad come down to one thing: the planning.
* In this session, we will dig into the specifics of how to put together the *strongest possible plan* for your events, to ensure that they are successful!

**EVENTS AS AN OUTREACH TOOL**

**(10 minutes)**

**Section Notes**

*Discuss how participants can use events as an outreach tool. Holding carefully planned events helps us do the following:*

***Maximize our resources*** *by reaching a large group of consumers at once*

***Target our work*** *by hosting events and generating buzz in carefully selected communities*

***Deepen our relationships*** *with partners by holding events that meet the needs of both parties*

*Note that some organizations might push back on the idea of holding events. If this comes up, try to point out to the participants pushing back that, although they may not consider some of what they do to be “events”, they often are. For example, “informational presentations” are considered educational events, and the information in this session will still apply.*

**Facilitator Script**

* Events are an incredibly valuable outreach tool. What benefit do you think holding events— like enrollment or educational events— brings to your work?
* They help us *[tease out the following from participants]*:
	+ **Maximize our resources**
		- We reach a large number of people in a small amount of time which, in the case of enrollment events, diminishes our need to recruit consumers into one-off appointments
		- We filter consumers into the appropriate event type so we can hyper-focus our own activities and better plan the use of staff time (e.g., certified navigators can spend their time on enrollment events, while other staff can work on outreach or educational events).
	+ **Target our work**
		- We better saturate a geographic area or audience by planning and promoting specific events in an area with a high rate of uninsured people
		- Word is often spread further and faster when there are specific events generating buzz within a community
	+ **Build relationships**
		- We build trust with our external partners by planning events that serve the needs of both parties (example: an enrollment event held at a local supermarket would provide assistance to the store’s employees as well as the general public)
		- It is easier to begin building new partnerships when we have a concrete ask to make of them (example: asking a broker to help enroll people at an event you are planning can lead to a lasting partnership)
		- Sharing the responsibility of planning events with our partners alleviates work for both parties, while still allowing both to reap the benefits of the events themselves
		- Events also help us build relationships with consumers, as they provide an easy opportunity for people to come face-to-face with MNsure representatives, especially in Greater MN.
* Planning events allows us to pull together all of the **fundamental elements of conducting successful outreach** to achieve one concrete goal – a successful event. Those fundamental elements are:
	+ Targeting the best audience and geographic location for the event
	+ Conducting effective outreach activities to get the word out to consumers
	+ Building relationships with external partners

**ESTABLISHING THE BASICS**

**(15 minutes)**

**Section Notes**

*Before event planning begins, you must first establish 1) a clear objective and 2) a target audience for the event. There are three objectives that an MNsure event can have: enrollment, education, and outreach. Both the objective and the target audience can inform several aspects of the event planning itself, including location, staffing needs, materials, etc.*

*It’s important to note for participants that the methods by which objective and audience are determined will vary. Sometimes the audience will be determined first and will thus inform the objective, or vice versa. There are also times where one or both will be determined by someone else. The important thing is that before the event planning gets underway, the objective and audience are clearly established, as they can greatly affect many factors in the planning itself.*

**Facilitator Script**

* The more specific we are about what our event is and who we are trying to reach, the better we will be able to plan appropriately, as these things can impact:
	+ What kind of space we need to secure
	+ How many staff/volunteers we need to be present
	+ The materials we will need to prepare
	+ How we are preparing attendees before the event
* Most of the time, the idea to host an event will come about in one of two ways:
	+ We encounter a specific location (geographic area or audience) that we think might benefit from the buzz and centralized attention that an event would provide
	+ We are approached by another person or organization that would like us to provide some sort of assistance to its stakeholders
* Regardless of how we come to the conclusion that an event would be beneficial, the first two steps we must take to make it a success are always going to be the same: we need to establish 1) the objective and 2) the audience.
	+ We are going to dig into both of these things. They are equally important, but they don’t always get determined in the same order.

**Establishing Our Objectives**

* First, we need to establish what exactly our objective is for the event: this is important because the objective drives the format, flow, and timing of the event.
	+ The first priority should be to establish a primary objective—the main focus and goal of the event— but in some cases there can be secondary goals as well.
	+ Is the objective to enroll people, to educate them, or is it solely to do direct-to-consumer outreach?
* **Enrollment Events**
	+ Primary focus is on certified assisters helping consumers through the MNsure enrollment process
	+ Require more significant planning, as well as careful preparation of attendees, because they will need to bring the appropriate documents with them
	+ May require more staff to help with consumer intake/registration, as well the recruitment of other certified assisters to help consumers
	+ Can, at times, include secondary objectives (such as outreach or education, in cases where consumers attend but are incapable of enrolling on-site)
* **Educational Events**
	+ Primary focus is on educating potential consumers about the importance of getting covered, and how they can enroll in MNsure
	+ Require significant preparation, as they often require some sort of speech or presentation
	+ Can be held by certified assisters or other knowledgeable staff, and the number of staff required can vary greatly
	+ Can also include the secondary objective of collecting consumer data for future follow-up, but not always ideal for on-site enrollment.
* **Engagement Events**
	+ Primary focus is on collecting consumer data for future follow-up
	+ Can require far less preparation than other types of events, and likely do not require many staff to be present
	+ Can be held by anyone at your organization, regardless of their assister certification status
	+ Can sometimes include a secondary objective, most likely education
	+ Will necessitate a plan to follow-up with consumers after the event
* Of course, in some situations many aspects of the event will be pre-determined for us. For example, if we are approached by a local technical college to do enrollment in their student union, we can begin planning with a lot of information already:
	+ Primary objective: enrollment
	+ Possible secondary goal(s): consumer data collection, possibly education
	+ Event space: student union

**Establishing Our Audience**

* The other thing we can determine from this same example is what audience we are targeting (Young Invincibles).
* A lot the time, however, we need to figure out for ourselves who the target audience is.
* *[Discuss:]* What parts of our event planning can be informed by knowing who our audience is? What does that help us determine? *[Tease out the following:]*
	+ Who to invite, and how many people we can expect to attend
	+ How the publicize the event
	+ What event objective would best serve this specific audience
	+ Which partners, if any, should be engaged
	+ Whether we need additional staff who are culturally-competent (e.g. Spanish-speaking navigators)
* Once you have done the work to establish clear objectives and a target audience for your event, you are ready to begin planning!

**THE NUTS & BOLTS OF EVENT PLANNING**

**(20 minutes)**

**Section Notes**

*Break down a successful event plan into four work buckets (logistics, turnout, day-of, and post-event) by facilitating a discussion on it. This discussion should include four flip chart pages, pre-taped to the wall, each with one work bucket listed at the top. As participants share answers, organize their responses on the appropriate flip chart pages.*

*Next, facilitate a small-group exercise in which participants will spend 10 minutes listing the work that went into (or should have gone into) the plan for this training session. Each group will then share its list with the entire group. Debrief the exercise and teach that event planning is about being systematic, detail-oriented, and organized.*

*For the small-group exercise, participants should be broken into 4 groups, then assigned one of the four work buckets to focus on. If the group is especially large, have participants work in groups of 3-4, and assign the same work buckets to more than one group.*

**Facilitator Script**

**Four Work Buckets of Event Planning**

* The quality of your event can have a lasting impact on the event’s participants. Being thoughtful about how you want the event to look and feel, and planning the details ahead of time can help ensure that the event is a great experience for your partners and the consumer—and that in turn *enhances* your relationships with them.
* *[Discuss:]* What are some of the things that you think should go into planning a successful event? *[Record responses on the four pre-labeled flip chart pages taped to the wall. Try and tease out specifics, such as:]*
	+ **Logistics:** driving directions, parking information, phone numbers to call for more information, clear registration instructions
	+ **Turnout:** an invitation/outreach plan— who we want to reach and how we will invite them via email, mail, and/or phone calls; reminder email, mail, and/or phone calls
	+ **Day-of needs:** number of staff; signage and/or welcome table; room set-up; bathroom access; refreshments; special needs
	+ **Post-Event needs:** send thank-you cards/emails; debrief the event with partners; update consumer database with any new data; invite consumers to take further action toward enrollment, if necessary
* These four things: logistics, turnout, day-of, and post-event, are the four buckets by which we organize our event planning work.

**Small Group Work Bucket Exercise**

* For this next part, you’ll be working with the other people sitting at your table. *[Assign each group one of the following even planning work buckets:]*
	+ Group 1: Logistics
	+ Group 2: Turnout
	+ Group 3: Day-of the event
	+ Group 4: Post-event
* You will have 5 minutes to come up with a detailed list of all the things that you think were done, or should have been done, to host this event—this training session—in your work bucket. For example, the logistics team would list securing a location, etc.
* After 5 minutes, one person from your team will share the list with the rest of the group.
* *[Give the groups 5 minutes to work; let participants know when they have 2 minutes left, then 1 minute, then when to stop. After they stop, instruct each group to report back on its list and tape each list to the wall. As groups report back, ask the rest of the participants to provide feedback, ask questions, etc., and provide your own feedback.]*
* Every event is different. The specifics of our four work buckets will vary with each event.
* The fundamentals of how to plan an event, however, are always the same:
	+ Anticipate peoples’ needs and make the event space a welcoming space
		- Ensure you are making it as easy as possible for people to get there and understand what to do
	+ Know who your key players are
		- Establishing who your key players are in the event planning and execution processes, what their roles are and what they are responsible for, can help ensure that the event runs smoothly and the details are taken care of.
		- Some key roles to consider filling are Event Lead, Materials/Logistics Lead, Spokesperson, and Turnout Lead. For smaller events, several roles may be played by the same person.
	+ Do what you can to make sure people show up—don’t rely on good intentions
		- Typically, only about half of the people you invite will actually attend.
	+ Know the site well and plan for problems as best you can
		- Plan for the worst, expect the best!
	+ Follow up with attendees to thank them and provide further assistance if needed
		- Ensure that this event is only one part of your relationship; invite them to take further action toward getting enrolled!

**WRITING AN EVENT PLAN**

**(15 minutes)**

**Section Notes**

*Share the event plan template, as well as the materials checklist. These two items should lead to a discussion of the importance of setting clear goals for the event, assigning roles, and setting expectations around communication during planning.*

*When walking participants through the contents of the handouts—particularly the event plan—consider asking participants to volunteer to read the list. When possible, share or solicit anecdotes related to the information in the handouts, in order to illustrate how the importance of specificity and detail in your event planning process.*

**Facilitator Script**

**The Written Event Plan**

* Now that we have a grasp on some of the fundamentals of how to plan a successful event, I’d like to share with you two tools you can use to help you clearly map out the steps you need to take to host any event:
	+ A written plan for your event
	+ A materials checklist
* Putting an event together can require lots of little steps; it’s easy to lose track of what needs to be done and when.
* It’s especially easy to let things fall through the cracks when there are several different people involved in the planning process, as there often are. However, it’s the little things that often make the difference between a great event and an unremarkable, or worse, bad one.
* To help get all parties on the same page, and to set clear expectations for how your event is going to come together (and when!), I suggest creating a written event plan with others in your organization or with your external partners, if applicable. *[Have participants refer to the plan template in their handouts.]*
* This is a template that can help you map out your event plan (including when specific tasks need to be completed and by whom) and ensure that you are staying on-track.
* *[Walk participants through the event plan template, highlighting things such as planning the timeline, roles, etc.]*
* When we are busy, it can be easy to let small things fall by the wayside (for example, making reminder phone calls to invitees, conducting a walk-through of the event space, or debriefing with your partners post-event).
	+ Creating a plan that is reviewed and agreed upon by your partners will help you keep each other accountable on following through with even the smallest details.
	+ Again, it’s the details that will make or break the event!

**The Materials Checklist**

* Another valuable tool to use is the materials checklist—you’ve got a sample one in your handouts.
* Your checklist is where you should keep a list of all necessary items for the event itself.
	+ Have all your event partners review and approve your checklist before the event. That way you can ensure that no items are missing and no quantities are wrong.
* Creating a list ensures that you will be well prepared for anything that might happen, big and small.
* You’ll likely be extremely busy in the days leading up to an event, and having a prepared checklist will alleviate some of the stress by ensuring that the person in charge of collecting materials has a clear idea of what they need to bring.

**PUTTING IT ALL TOGETHER**

**(30 minutes)**

**Section Notes**

*Participants will rejoin their small groups from earlier in the training and together they will write a plan for an event based on scenarios they are given (there are four scenarios total). The exercise itself should take 20 minutes.*

**Facilitator Script**

**Event Planning Exercise**

* We’re now going to do an exercise that will allow us to practice everything we’ve learned in today’s session.
* You’ll be working with the same small groups you were in before, but this time you’ll be given a scenario where you’ll be asked to plan a specific kind of event.
* You and your team will work together to write the planning timeline for your event.
* Try to be as specific as possible!
* I encourage you to think creatively, share with one another, and have fun!
* *[Allow participants to get back into their small groups, then pass out one Event Planning Scenario to each group, along with copies of a blank event plan. Give participants 20 minutes to work together on writing their plans, providing guidance where needed. Let participants know when they have 5 minutes left, then 2 minutes, then when to stop.]*

**Debriefing the Exercise**

* *[Discuss:]*
	+ Was anything difficult about planning this event?
	+ Did you learn anything new from your group?
* There is no right or wrong way to plan an event, so long as it is being planned carefully.
* The important thing is to have clarity on what it is you are hoping to accomplish, and to keep your attention on the details!

**SESSION EVALUATION**

**(10 min)**

**Section Notes**

*This section is an easy way for the facilitator to get a sense of how participants are feeling with the information they just received. If you are continuing on in a long-term support role for the participants, consider making note of how everyone says they are feeling, and checking in later on with those who seem uneasy or unhappy.*

*When everyone has responded, the facilitator should ask 2-3 people to elaborate on their feelings. Drawing on what has been expressed, share a lesson related to the topic of event planning.*

* We’re nearing the end of today’s session, and I want to thank everyone very much for participating.
* Before we go, I am going to pass out an Event Planning Tips Sheet, which is a supplementary document for you to take home and reference and includes various other things for you to consider while planning an event.
* To help me continue to make these trainings better, please complete that evaluation form you’ve been given and return it to me. It shouldn’t take long!
* Before we go, I’d like to go around the room and have everyone share one word about how they are feeling coming out of this session. *[Facilitate this process and carry out the full evaluation and lesson referenced above.]*
* Thanks, again, for participating today! I’m excited to hear all about all the great events you will plan in the future!
* *[Adjourn.]*