

Event Planning Using Function Analysis

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EVENT PLANNING USING FUNCTION ANALYSIS

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ABSTRACT

Event planning is expensive and resource intensive. Function analysis provides a solid foundation for comprehensive event planning (e.g., workshops, conferences, symposiums, or meetings). It has been used at Idaho National Laboratory (INL)¹ to plan events and capture lessons learned, and played a significant role in the development and implementation of the "INL Guide for Hosting an Event." Using a guide and a functional approach to planning utilizes resources more efficiently and reduces errors that could be distracting or detrimental to an event. This integrated approach to logistics and program planning – with a primary focus on the participant – is a recipe for success.

¹ Idaho National Laboratory (INL) is the U.S. Department of Energy's (DOE) lead laboratory for Nuclear Energy research and development. In addition, INL has strong research focus areas in clean energy development and national security systems.

INTRODUCTION

Most of us have broad experiences attending conferences. Some stand out in our minds for one reason or another; but many are easily forgotten. What is it that makes some conferences, meetings, symposiums, or workshops (referred to hereafter as “events”) stand apart from others? Is it the program? The location? The social activities? The people? The answer is likely “yes” to one or more of these items. In fact, all of these contribute to a successfully executed event. Conversely, poor planning in any one of these areas can have a devastating impact on how participants remember their experience.

Planning an “event” is really no different than planning the construction of a building, a bridge, or a software system. It involves the typical project management process of defining the cost, scope, and schedule. Unfortunately, the logistical side of event planning is typically left to the administrative assistants, while a separate team develops the technical program. This can lead to disjointed planning and execution. An international event held in Boise three years ago illustrates what can happen when this type of disjointed planning occurs. The opening plenary was scheduled as a single three-hour session. A formal panel of speakers, each of whom presented during the session, was seated on an elevated stage at the front of the large room of 500 people. Break food was provided in the foyer half way through the plenary, but no actual break was scheduled in the program! Further, several speakers were forced to very publically leave the large stage during presentations to take a restroom break. There was no integrated approach to ensure the logistics and technical program were executed together.

FUNCTION ANALYSIS TO THE RESCUE

As the INL Value Engineering Group began planning more and more events at INL, we realized that there was no guide available to standardize this process and help us avoid the frustrations frequently

“...I find that attending a good conference always gives me the refreshing feeling of reassurance that I am in the right profession, and one that offers new challenges, new insights, new formats for the more experienced and is welcoming to and encourages the less experienced.” [1]

experienced with planning and execution of large events. We began documenting a process, much of which is standard project planning, but soon realized we also had to consider a large body of INL and DOE-specific requirements, such as security, export control, international invitations, visas, and DOE guidelines for funding. It was complex! The resulting “INL Guide for Hosting an Event” documents a systematic approach that combines function analysis, project management, teamwork, and lessons learned to form a comprehensive philosophy of customer service. It is a living document that can be tailored by the user to plan events from beginning (purpose development) to end (closeout) for simple to highly complex events.

Function Analysis, a critical component of the Value Engineering Job Plan (systematic approach), was used to structure the event planning process. Starting from lessons learned, experience, and some common sense, a comprehensive functional process flow diagram was created and vetted with the various process owners over a six month period of time (see Figure 1). Once accepted, the diagram became the basis (and focal point) of the INL Event Planning Website (see Figure 2). Hyperlinks were used to access checklists, guides, and other applicable websites, such as DOE funding requirements, local hotels, meeting venues, caterers, room arrangements, etc.

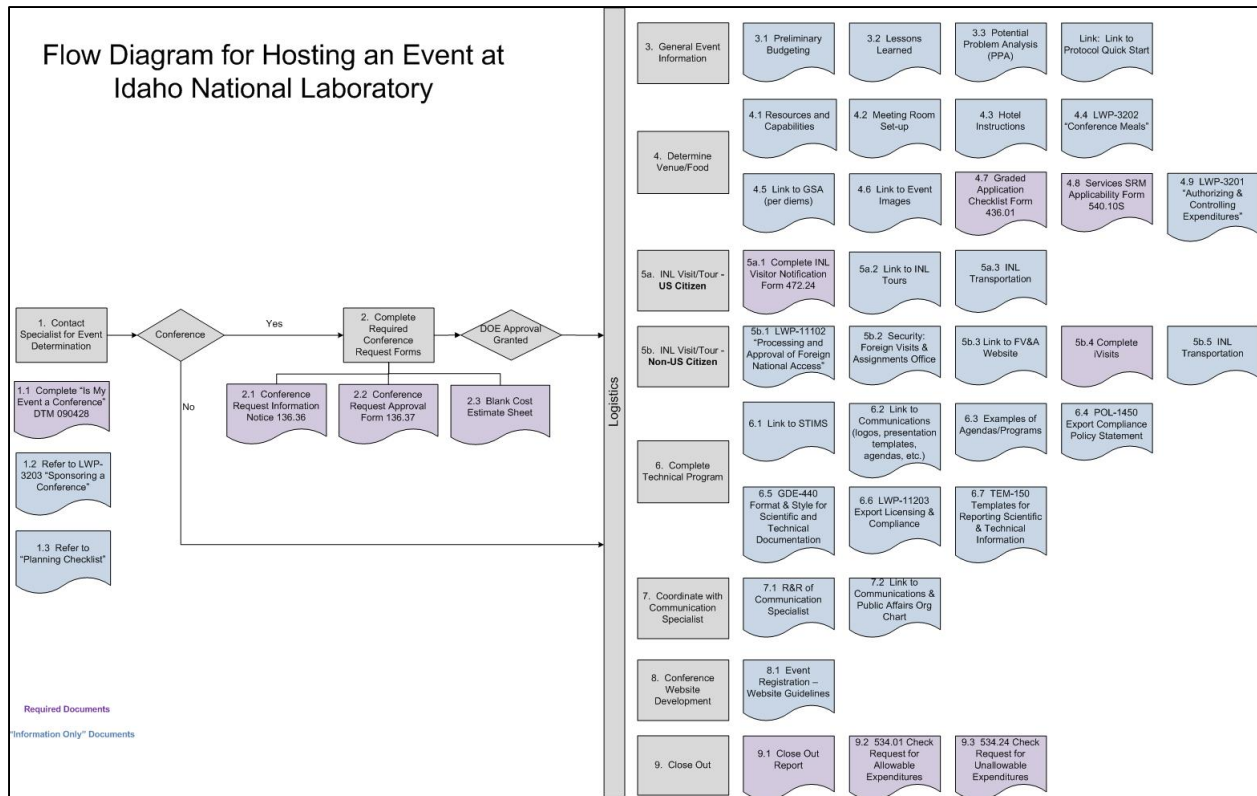


Figure 1. Flow Diagram for Hosting and Event at INL



Figure 2. INL Event Planning Website

At the time, we did not believe a Function Analysis System Technique (FAST) diagram was needed, but we created one anyway just to test the relationships and completeness of the process. It was difficult. Our higher order function was “Execute Successful Event” and the basic function was “Satisfy Needs.” However, the process flow functions did not fit on the critical path. We tried, but failed. What did we miss? We went back to the original process flow diagram and quickly realized that nothing in the process flow really focused on the participant (attendee). In contrast, our FAST diagram was “all about” the participant. We could not “execute a successful event” without satisfying the needs of the attendees, and the attendees needed more than checklists, cost estimates, and schedules. They needed consideration, accommodation, respect, excitement, value, and a host of other more relational and less “technical” things.

As value engineers and facilitators, we plan meetings with a focus on both the team and the process. This integrated approach is part of the uniqueness and success of our profession. Because of our FAST diagram, we realized that our technical VE experience and our strong customer focus could be combined into a powerful approach to event planning and execution. Integrated logistics and program planning – with the primary focus on the participant – gives us the edge.

WHAT IS A “SUCCESSFUL EVENT?”

A “hospitality expert” who served on the planning team for one of our events emphasized that participants will remember “how they were treated” or “how they felt” during the event much more than they will remember the speakers or technical program. This personal, human aspect is often missing from many large and small events. How we “feel” is impacted by a number of factors, including organization of the event, friendliness of the organizers, the location of the event, social activities, food, and accommodations.

Over the last two years, we collected feedback from several INL events in an effort to improve our planning, execution, and effectiveness. This was not a formal data collection effort. Some of the overall consistent “themes” were

- Networking opportunities. Provide time to interact and engage in discussions with new contacts and existing colleagues.
- Appropriate and interesting keynote speakers. Often, the keynote speaker creates the excitement for the event. They “promote” attendance and should have perceived value to the attendees.
- Advertising. Attendees need to know about events well in advance. They want to see the event schedule, location, and associated activities to determine if they will attend.

“To design conferences that lead to more ideas and innovative results for the participants, we need to raise our expectations of how we can engage our audiences and transform our planning approaches. This means investing more time and creativity to consider what is possible when people, speakers, and important issues come together.” [3]

As you can see, many of the comments received deal with how the attendees felt rather than with the technical information they received by attending. If the attendees needs are being considered at every step (function) of event planning; a successful outcome is assured.

So, what do the organizers of successful events consider when choosing keynote speakers, developing the agenda, and arranging various other logistics? According to the article, “Top 5 Tips to Hold a Successful Conference,” [2] “...you must make sure that you are ready to not only provide great content but also great comfort to all the participants.” They offer the following five tips on organizing a great conference:

1. Great Content: Conference topic should be very interesting.
2. Proactive Participants: Attract the best people.
3. Good Food: Variety and good quality provided at regular intervals with snacks and coffee in between.
4. Friendly Service: Volunteers should be very friendly and gracious to all the guests.
5. Lodging: Clean, functioning rooms.

Ed Bernacki, The Idea Factory, defines a successful conference in his article, “Every organization at some point asks, “Are our conferences effective?” [3] as “...*people finding or creating new ideas at a conference and then acting on them after the event.*”

He believes in creating the opportunity for ideas during events. Designing a program full of speakers with no time or opportunity to reflect, discuss, or review will not allow attendees to distill the value from the event. These opportunities have to be built into the program.

Bernacki suggests that every event creates a culture unique to itself, which could be a culture of new thinking and ideas. It is reflected by the venue, the content, and the people. “It starts with registration and your opening session and continues until you close the event.” In his book, *Seven Rules for Designing More Innovative Conferences*, he identifies seven rules to apply innovation to event design to build a culture of new ideas and high participant involvement in conferences. A few of his rules are provided below:

- Rule 1:** *The experts at your conference are in the audience, not on the stage.* How do you plan to use the expertise in the room to benefit others at the meeting? Recognize the expertise of your participants.
- Rule 2:** *Learning objectives drive the design of your content.* How do you want to involve people in the event? How can the conference be used to provide the insights, contacts, or opportunities that add directly to the bottom line of the participants?
- Rule 3:** *Always use the brainpower of an audience to create something.* When people come together great ideas are possible. This provides an opportunity to “feel” engaged. Bernacki provides an example from an HR conference of 300 attendees. He asked each one to write their answer to this question: What is the biggest HR challenge facing your organization next year? They discussed the question with others in the meeting and handed in their answers, which were used for future workshops, articles, and conference themes.
- Rule 4:** *Put structure into your networking and mingling opportunities.* Who would benefit my meeting whom? How would the event structure be used to facilitate networking? Are there certain special events that would gather people with similar interests?

There are many definitions of “successful events” depending upon the sponsor’s goals and attendees perceptions. However, the result of a “Successful Event” is how the participant felt about the experience. There are always constraints to any planning effort, such as budgets, venue limitations, etc. However, these constraints don’t limit the ability to make participants “feel” valued, respected, and welcome. The Value Engineering FAST diagram is a helpful method to remain focused on the attendee or participant during the planning and execution of any event.

EVENT PLANNING FAST DIAGRAM

Our Event Planning FAST Diagram (see Figure 3) serves as the basis for the following discussion on Event Planning. *Determine Event Purpose* is the Input Function; *Execute Successful Event* is the Higher Order Function; and the Basic Function is *Satisfy Needs*. These three FAST diagram functions for Event Planning result in a customer (attendee, participant, and sponsor)-driven planning and execution approach to the remaining functions that were not present in the original functional flow diagram developed by the INL team. We will examine the FAST diagram critical path functions moving in the “Why” direction from right to left.

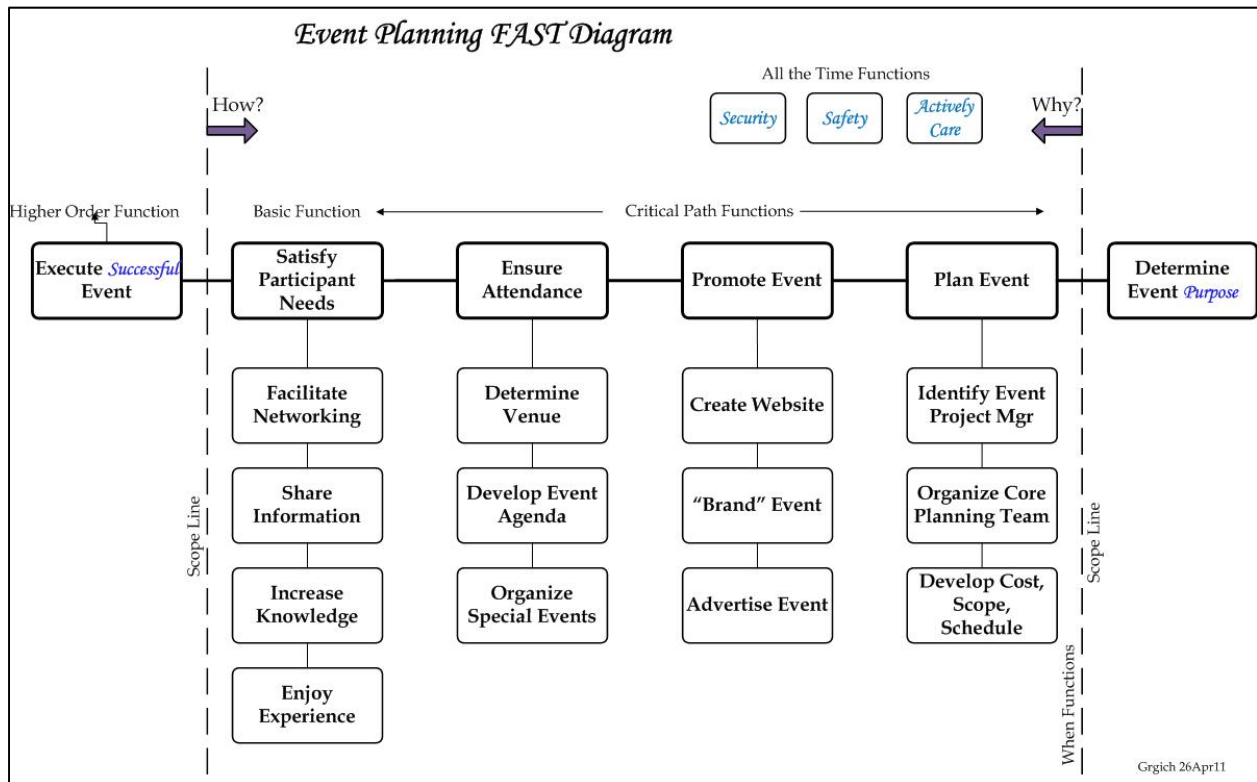


Figure 3. INL Event Planning FAST Diagram

Determine Event Purpose

The Input Function to define the purpose of the event is outside the scope line since it is typically the vision of the sponsor, conference chairperson, or funding organization. The emphasis is on “purpose.” The purpose of the event drives the planning effort and should convey value and excitement to the participants. It may be helpful to ask the following questions?

- What is the outcome of the event?
- Who is the target audience?
- What are the participants needs?
- What do you want participants to experience?
- Will it add value to participants and/or their profession?

“Create your learning strategy to define everything that happens inside the conference rooms. It should clearly define the problems or issues important to the participants and how these will be addressed.” [3]

Plan Event (Logistics)

This function involves the typical project management approach of defining cost, scope, and schedule. The INL Event Planning Process Flow Diagram (see Figure 1) is a visual example of this critical function. As expected, there is a long list of “when” functions to develop and tailor specific to each event.

However, for the purpose of this paper, we will focus on three high level when functions:

- **Identify event project manager, planner, or conference coordinator.** This is the most critical piece of the planning process. A person should be identified as the one responsible for planning and execution of the event. The project manager then assembles the planning team with key roles and responsibilities. (See Figure 4).
- **Organize the integrated core planning team.** Each core team member is given a critical role in the planning process. This team should be able to fully reflect the needs of both the sponsor and the attendees. Each member should be experienced/qualified for their respective role; able to make decisions; dependable; and able to work well with others. Additional team members can be added as necessary to supplement the core team. Together with the event project manager or conference coordinator, they provide a comprehensive and integrated planning approach.

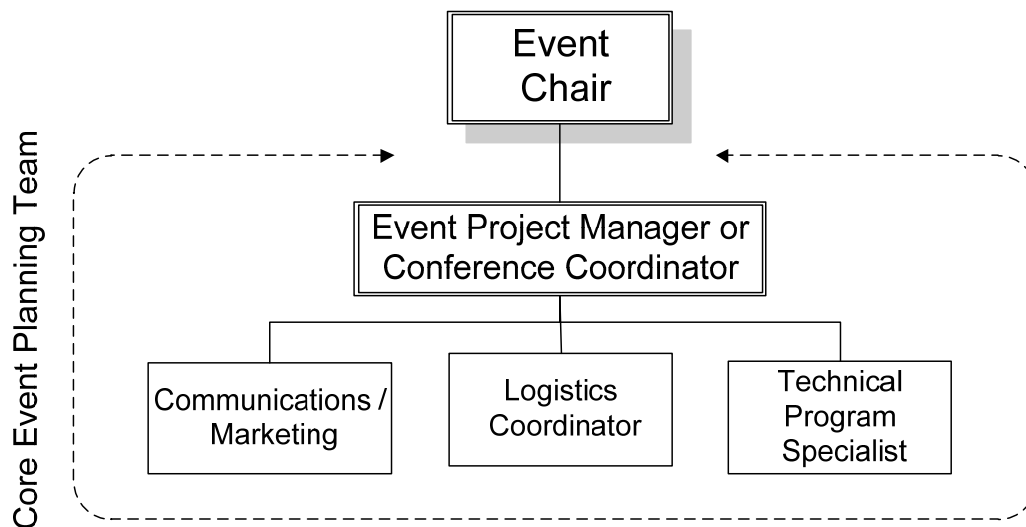


Figure 4. Basic Example of an Event Planning Team Organization Chart

- **Develop the cost, scope, and schedule.** This is an iterative process as the scope and schedule of the event unfolds. The scope and budget should be prepared by the sponsor/chairperson, the project manager, and the planning team. The project manager should be accountable and in full control of the budget. The budgeting process directly feeds the schedule; therefore, consider the major event components, estimated cost, and timeline for each. Examples of event components:
 - Marketing/Publicity items (posters, programs, mailing, printing, photographer...)
 - Facilities (lodging, conference room, break rooms, banquet rooms, projectors, screens...)
 - Meals (catering, breaks, beverages, special dietary needs...)
 - Conference materials (name tags, lanyards, pens, registration...)
 - Labor (organizers, plenary/guest speakers...)
 - Furniture (tables, chairs, centerpieces, linens, special event needs...)
 - Special Events (entertainment, tours, transportation...)

After the cost, scope, and schedule are developed, but still early in planning, the project manager should conduct a potential problem analysis with the sponsor and planning team. Discuss “what could go wrong?” for each major activity and incorporate mitigation activities into the planning process.

Promote Event

When promoting an event, potential attendees should “feel” a need to attend. Advertizing should be clear, concise, and enticing. Let the attendees know what they will be missing by not attending. A key point here is that everyone wants to feel like their money is well spent (especially in an environment of declining economy). Let potential attendees know that their needs and wants will be met at the event and they will be the first priority.

- **Create a website.** Create a website that facilitates registration and clear communication. Ensure the theme of the event is clearly stated. Also highlight that special activities have been planned, as this will aide in attracting participants.
- **“Brand” the event and program.** Use a consistent color theme and graphic for the website, the program, correspondence, posters, CD and report covers, etc. Upload the program to the event website as early as possible, even if it is in draft format. The program should include biographies of the speakers, the event schedule, summaries of event sessions and activities, and local information, such as maps, restaurants, museums, shopping malls, etc. Attendees will often stay an extra day to do some site-seeing.
- **Advertise event.** It is important that the event is well advertised to reach the target audience. Getting the right attendees improves the quality of forum discussions, networking, collaboration, and idea sharing. Promoting the event can be done via many media outlets, such as newspapers, magazines, television, radio, and email.

Ensure Attendance

The meeting venue and agenda (plenary speakers and presentations) will ensure attendance if presented early and with excitement. This function is closely tied with Promote Event.

- **Determine venue.** The venue must meets the needs of the participants, for example, exciting location, adequate meeting space, catering options, sleeping rooms, special events, evening activities, easy access, proximity to airports, etc. The venue is a major factor in how attendees “feel” about the event.
- **Develop event agenda or “program.”** This is an iterative process that requires attention to detail. Determine speaker tracks that clearly support the “purpose” of the event. Carefully select and invite speakers that are interesting, dynamic, and well known to the target audience. Also, remember that the invited speakers are attendees too! They may need additional support to prepare for their presentations. A “last minute” email to presenters two weeks in advance is a nice reminder about their presentations, meeting location, support staff, and specific contact information.
- **Organize special events.** Special events include technical tours, guest activities, evening celebrations or banquets, and sponsored lunches. Participants can network, collaborate, and enjoy various events in a relaxed and enjoyable setting.

Satisfy Needs

Why do we perform all the tasks involved in hosting an event? Why do we plan the logistics, promote the event, and provide opportunities for collaboration and networking? When you dig down to the basics, it is to ensure the attendees find the event worthwhile. They can implement what they have learned and share it with others. They have added technical knowledge that will support their profession. They have new business contacts and/or job prospects.

- **Facilitate collaboration and networking.** Special events, banquets, forums, and breaks provide excellent opportunities to collaborate and develop professional relationships that last for years. When organizing these types of “relational” events, consider the attendees’ needs. Remember, “Facilitate” means “make easy.” Make sure instructions are very clear, transportation is easy, the food is good, and the event is appropriate for the audience. You are letting the attendees know that you recognize the value in human networking and collaboration.
- **Share information and Increase knowledge.** Information is typically shared via forums, presentations, and keynote addresses. Through these avenues, presenters share information and attendees increase their knowledge. As discussed earlier, presentation topics should support the purpose of the event and be compelling to the attendees. Ensure that presenter information is available to the attendees via the “Event Proceedings” or a website. Attendees should feel that their time spent at the conference was informative and contributed to their professional development.
- **Enjoy the experience.** This is the culmination “feeling” of the total event. Did all aspects of the event, from the venue to the presentations, combine to provide a good experience for everyone, including, the attendees, the presenters, and the organizers? This simple concept – “Enjoy the Experience” – should be the ultimate objective.

Execute Successful Event

This is the higher order function; our ultimate goal where the planning efforts come to fruition to fulfill the needs of the attendees. It starts with registration and ends with evaluation and lessons learned. Every aspect of “execution” should be planned and discussed with the staff supporting the event. Ensure they are focused on the participant by providing them the tools to solve problems quickly and perform their roles effectively. These tools could include readily available reference cards with organizers phone and emergency numbers, maps of the facilities, checklists of activities or actions, etc.

An effective evaluation form or method should be used to collect information from participants.

“When great logistical plans start with great learning plans you can create great conferences. Well-defined-learning objectives can be used to sell your event, to focus your speakers, and to measure the bottom-line impact. This is the key to an effective event, one that prompts people to act on their ideas after the conference.” [3]

Carefully design this process to collect useful data that can be used for future events. In addition, hold a lessons-learned meeting with the organizers immediately following the event to collect additional feedback. This information should be formally documented and shared with the organizers after the event.

CONCLUSION

There are hundreds of valuable resources to assist in the planning and execution of events (conferences, workshops, meetings, symposiums, etc.). The logistics often consume the planning efforts and overshadow the real intent of an event. Using function analysis with a focus on the attendees provides a comprehensive formula for

a successful, memorable event. The focus on the attendee cannot be over emphasized. They must be able to see the potential benefit in the pre-event materials and “feel” the event was valuable when it is over. The FAST diagram critical path functions of planning, promoting, ensuring attendance, and satisfying needs moves the sponsor’s purpose from a vision to a well executed and successful event.

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Engaging subject matter experts as part of the core team provides the ideal environment for the successful execution of an event. To keep the core team working towards the same highest function, continual review of the functions of the event is imperative. While non-critical path functions can vary from event to event, the critical path functions, basic function, and higher order function should be similar to what was discussed in the paper. Regardless of the theme of the event, determining the purpose, proper planning, promoting the event, ensuring attendance, and satisfying participant needs should always be what we are striving for. When we have the participants needs and experience in the forefront at all times, participants are free to focus on the technical aspects of the event because their logistical needs are being satisfied. In this way, we cannot have anything other than a successfully executed event.