[Event Name]

Event Playbook (TEMPLATE)

**Last update:** Date

**Supporting Documentation & Links:** Provide relevant links like strategy, personnel, timelines, contracts, assets and CFPs

**Core [Event Name] Event Details:**

* Event Name: [Event Name]: [City] hosted by [Organization(s)]
* Host Organization: Insert company(s) hosting
* Event In-Person Location: Insert address
* Event In-Person City, State, Country: Insert City, State, Country
* Event Virtual Location: Insert link to virtual event platform (ex: YouTube link, etc)
* Event Date: List dates
* Event Time: List time and relevant time zone
* Event Time Zone: Insert relevant time zone
* Main Contact: Insert 1 - 2 main contacts planning the event
* Event Type: Virtual-only or hybrid event (virtual and in-person event)
* Link to Planning Folder: Insert link to planning doc

## Required Roles & Resources

Team Roles & Responsibilities:

* *[On-site/In-Person Event PM Lead] -* This individual is the event strategy and logistics lead for the in-person element of the hybrid event. They should be aware of the virtual event’s success and support any collaboration required to ensure the hybrid event is successful but are not responsible for the virtual event.
  + Personnel:
    - Name, title, contact
  + Tasks: overall project management for the event (communications, risk identification, tracking status/meetings/etc.), speaker management, ensuring work is done on time, defining enhancements to event, reviewing assets/demand gen/content plans/etc. to ensure success of event based on past learnings. Domain expert on virtual events.
* *[Virtual Event PM Lead]* - This individual determines the virtual strategy and manages the virtual platform and streaming. They should be aware of the in-person event’s success and support any collaboration required to ensure the hybrid event is successful but are not responsible for the in-person event.
  + Personnel:
    - Name, title, contact
  + Tasks: overall project management for the event (communications, risk identification, tracking status/meetings/etc.), ensuring work is done on time, defining enhancements to event, reviewing assets/demand gen/content plans/etc. to ensure success of event based on past learnings. Domain expert on virtual events.
* *[Content Lead / Speaker]* - Expert in the content to share with the audience during the hybrid event. They work closely with the core content leads to determine best practices, full understanding of the content, and ability to comfortably communicate learnings to the audience.
  + Personnel:
    - Name, title, contact
  + Tasks: overall project management for the event (communications, risk identification, tracking status/meetings/etc.), ensuring work is done on time, defining enhancements to event, reviewing assets/demand gen/content plans/etc. to ensure success of event based on past learnings. Domain expert on virtual events.
* *[Video Producer / Editor]* - This individual manages the logistics of the actual video production before, during, and after the event. pre-event work, setting up tech checks, providing keys for restream, creating links, responsible for day of show production / switching / resolving any video or audio issues with live content
  + Personnel:
    - Name, title, contact
  + Tasks: pre-event work, setting up tech checks, providing keys for restream, creating links, responsible for day of show production / switching / resolving any video or audio issues with live content, saving content to be streamed on-demand, editing video content for the closing ceremony or social promotion
* *[Demand Generation Strategist/Promotions/Marketing]* – drives and crafts demand generation strategy through specific themes, communications, and social media presence. Blog posts, paid social ads, targets customers with large developer teams
  + Personnel:
    - Name, title, contact
  + Tasks: writing and reviewing all comms to have a consistent and focused voice, execute all social media posts and engagements, answer questions on social platforms, reports analytics to the team
* *[Chat Moderators / Lead Subject Matter Experts] -* point of contact to answer questions in chat, on virtual platforms and social during the event
  + Personnel:
    - Name, title, contact
  + Tasks: monitor Code of Conduct, collect questions that may be relevant to answer audibly by the speaker, obtain contact information for those with questions outside the scope of the event, offer ways for the audience to engage further post-event
* *[In-person Moderators / Lead Subject Matter Experts] -* responsible for answering attendee questions during the session, as well as responding to attendee comments. Helps speakers answer questions during Q&A portion of sessions
  + Personnel:
    - Name, title, contact
  + Tasks: monitor Code of Conduct, provide expertise, share resources to obtain additional knowledge around a subject, offer ways for the audience to engage further post-event
* *[Traffic Controllers/Staff] -* manage the flow of the events and act as support for the event team.
  + Personnel:
    - Name, title, contact
  + Tasks: Verify speakers are on time, agenda is being followed, audience needs are being met, taking notes of successes and future improvements, “floater” to help support unforeseen tasks pre, during, and post-event

## [Event Name] Agenda

* **Sample Agenda:**
  + Hypothetical Date: June 9th 08:00 - 12:00 CT
    - Example is operating under the assumption that Chicago region picked this date due to X, Y, Z reasons
  + Hypothetical Location: [ORGANIZATION] Headquarters, Chicago, IL
  + Event Agenda:
    - 08:00 - 08:30: Welcome and networking
      * Led by [ORGANIZATION] representatives to help facilitate in-person conversation and representative supporting the virtual attendees
    - 08:30 - 09:00: [ORGANIZATION] overview and exciting announcements
      * Led by a [ORGANIZATION] representative in-person and streamed virtually
    - 09:00 - 09:15: Break and networking
    - 09:15 - 09:30: Introduction to the Workshops / Small Group Assignments / Sessions
      * Led by a [ORGANIZATION] representative in-person and streamed virtually
    - 09:30 - 10:15: Workshop & Collaborative Experience
      * Led by a [ORGANIZATION] representative in-person and streamed virtually
    - 10:15 - 10:30: Break and networking
    - 10:30 - 11:45: Lightning Talks and Unconference Discussions
      * 10-minute group lightning talks/open discussions led by the small groups to the entire attendee audience to present learnings, findings, and openly discuss suggestions, concerns, perplexities, and action items
      * In-person groups will present to both in-person and virtual audiences; Virtual groups will present to both in-person and virtual audiences over a digital platform and in-room AV
      * Unconference lightning talks/open discussions about various topics relevant to the [ORGANIZATION] / sustainable development
    - 11:45 - 12:00: Closing notes and next steps
      * Led by a [ORGANIZATION] representative in-person and streamed virtually

## Planning Team Workback Schedule

* **Task Checklist:**
  + Pre-Event (3 – 6 months prior to event)
    - Set up weekly meetings with the planning team and core stakeholders
    - Ensure all members are included in the core planning calls
    - Determine the content leaders, speakers, moderators, and core contributors
    - Clearly define the goals, objectives, and key performance indicators (KPIs) when crafting a sustainable, zero waste, and carbon negative event from the beginning. Start with sustainability in mind – from awareness to execution.
    - Determine the localization strategy of how to engage both internal and external [ORGANIZATION] members
      * Determine the localization strategy for language and cultural nuances
    - Tell the story to your colleagues, customers, and future event partners.
      * Communicate details digitally and with brevity
    - Set up registration and social engagement on applicable platforms (Meetup, Twitter, LinkedIn, Facebook, TikTok, blogs, vlogs, podcasts)
    - Set up invitations for both the in-person event, as well as the virtually accessible event
    - Compile the full requirements for the event including food, beverage, cleaning, vendors, swag, AV equipment, streaming equipment, video editing requirements
      * Food and beverage:
        + source from an organization that can commit to our sustainable values. All disposables should be completely banned. All items should be composted and then recycled if necessary. Excess food should go home with attendees, staff, and/or donated.
      * Equipment:
        + Nothing should be single-use. If sourced from a sustainable vendor, items can be reused for future events.
      * Swag:
        + Examine your use of swag at events and the value the items truly provide to the attendee and the event’s goal. Ask yourself if the swag is sustainably sourced, if the items serve a purpose towards lowering your footprint (eg: water bottles to use during the event and keep post-event), can the offerings be served digitally instead (eg: wellness memberships), and outline your plan for excess donations and/or recycling.
        + Virtual swag provides flexibility for the attendees to choose what is relevant to them and when they want to access the swag.
        + Attendees should work or engage to earn swag.
        + Sustainable, virtual swag can be low to no cost as well, like backgrounds, Digital Kid Activity Books, and wellness guides.
        + Ensure that the swag is relevant to the audience.
  + Pre-Event (10 weeks prior to event)
    - Host speaker readiness and moderator training(s)
    - Create a full run-sheet and agenda for the event to assist with flow and specific production guidelines
    - Host “know before the start” trainings to answer applicable event questions and provide necessary details
    - Continue to promote across internal and external mediums to drive awareness and amplification
  + During-Event
    - Speak, moderate, and provide topic support for the audience
    - Act as site manager and enforce the runsheet and agenda across platforms
      * Monitor Code of Conduct and provide help for attendees during the event
    - Share event details in real time to encourage participation on social and within the event
      * Save event clips to promote on-demand consumption and amplification for the event after its conclusion
  + Post-Event (within 2 weeks post-event)
    - Share recordings with the core planning team for future use
    - Share sessions, answer questions submitted during on-demand views, and highlight the experience over social.
      * Repurpose the content for future events
      * Provide feedback on improvement opportunities and shared successes
    - Host a retrospective meeting to gain valuable feedback for future experiences
    - Amplify on-demand sessions and partner with organizations interested in promoting specific sessions and/or topic areas
    - Blog about the event and share learnings
    - Engage the community and local networks on future opportunities

## Code of Conduct

All events must have a Code of Conduct to support and enforce inclusive and respectful event experiences. The Code of Conduct applies to the attendees, but also to our shared, global environment.

[Organization] [Event Name] Code of Conduct

We seek to provide a**respectful, friendly, professional experience for everyone, regardless of gender, sexual orientation, physical appearance, disability, age, race or religion.** We do not tolerate any behavior that is degrading to any gender, race, sexual orientation, or disability, or any behavior that would be deemed harassment or discrimination. Individuals are responsible for knowing and abiding by our standards and we encourage everyone to assist in creating a welcoming and safe environment.

Additionally, we strive to treat our shared planet with the same amount of respect. Please report any questions, concerns, or disruptive activity or behavior to the organizing team, so that we can address the issue immediately.

**Our Societal Values**

Throughout each interaction, we aspire to embody and champion the values of being:

* Welcoming and purposeful, create space for varying communication styles and preferences
* Thoughtful in how others may interpret your words
* Respectful and inclusive by respecting differences of opinion
* Curious by assuming good intent and focusing on continuous learning
* Open to feedback and growth as we all dedicate time to learning and growth

**Our Sustainability Values**

Events, whether digital or in-person, can have a significant impact on the environment as well as the impacted community. This is both a positive and negative impact, therefore, all experiences must dedicate time and work to ensure we reduce our emissions and eliminate unnecessary waste. We commit to:

* Reduce carbon emissions and consumption in all areas of event execution
* Eliminate any unnecessary actions that disrupt the sustainability goals and have a limited impact on the attendee experience
* Measure and report each action to accurately offset unavoidable emissions
* Hold all entities accountable from the event organization team to vendors to attendees through positive reminders and collective goal setting
* Continue to find areas to improve and have actionable items publicly outlined after each event on what could be done better next time.

**Our Sustainability Commitment (OPTIONAL / APPLICABLE TO IN PERSON)**

Above and beyond our values, we want to display our true commitment to our community, fellow inhabitants, and planet. As an organization, we commit to the following guidelines when applicable:

* All attendee travel will be intentionally minimized and offset using verified sources. This includes both land and air travel.
  + This estimated travel footprint can be calculated by asking a few basic questions within your registration form regarding their city of origin and whether the attendee will be staying in a preferred hotel.
* All selected and preferred venues are certified “green” (see sample certifications below) and have a detailed plan on sustainability and combating climate change. Venues should have a waste diversion system in place to recycle and compost, as well as sustainable sourcing practices by buying products from local, environmentally conscious producers.
  + Proper certifications may include: [Green Seal Certified](https://www.greenseal.org/), [Meeting Sustainability And Green Programs | IACC Conference Centres (iacconline.org)](http://www.iacconline.org/environmental-initiatives), [The TRUE program for zero waste certification | TRUE (gbci.org)](https://true.gbci.org/true-program-zero-waste-certification), [Certified Carbon Neutral](https://www.carbonneutral.com/how), [Certified Organic](https://www.ams.usda.gov/services/organic-certification/becoming-certified) and [Marine Stewardship Council Standards](https://www.msc.org/standards-and-certification/developing-our-standards), [Leadership in Energy and Environmental Design (LEED) Certified](https://en.wikipedia.org/wiki/Leadership_in_Energy_and_Environmental_Design), and commitments towards [carbon offsetting](https://www.terrapass.com/).
    - Reference: [Sustainability Certifications: Which Can You Trust? - ethical.net](https://ethical.net/guide/sustainability-certifications-which-can-you-trust/).
    - Please note: Users should exercise independent judgment in working with any 3rd party providers listed here.
* Effective supply chain methods will reduce unnecessary food miles and reduce food waste to under 5%.
* All unserved food will be donated to reduce food waste.
* All cutlery and utensils will be reusable. If reusable is not an option, compostable products are an alternative, but only under specific circumstances.
* Zero waste swag will be offered meaning that most items will be offered digitally, and any physical swag items will be sustainably sourced and donated post-event.
* We will provide as many digital substitutions as possible and enhancements when applicable to reduce and minimize carbon footprints. This includes learning materials, resources, and on-demand content.

**Summary**

* Treat everyone and the planet with respect, kindness, and empathy
* Use welcoming and inclusive language
* Be thoughtful in how you communicate in person and online
* Don’t be destructive or inflammatory
* Gracefully accept constructive criticism
* Listen with purpose, create space for others’ communication preferences; honor them by shifting yours to accommodate
* Be transparent in reporting on how to continue to improve inclusive and green practices
* Reach out to the organizers if you need anything at all