

Branch Event Project Plan Template

This project plan template is for Branch Event Project Manager to use plan their event. Please note this plan is not extensive and each event is different, so please amend as applicable. Timelines are suggested minimum time to allow for tasks for guidance, but we would advise allowing as much time before the event as possible.

Process

When the event proposal is drafted, a Branch Event Project Manager should be agreed by the branch. This person has overall responsibility for the delivery of the event to time and budget, and leads the project.

When approval is received from the Events Committee to proceed with the event, this template should be used to plan a branch event. The draft project plan is submitted to the Conference Producer, who circulates amongst the NI staff team with involvement in the project. The Conference Producer then either confirms the dates and tasks fit within staff timelines, or proposes changes if not, to the Branch Event Project Manager. A project plan is then agreed, and a copy circulated to all persons with a task to deliver that project. *Any changes to timelines must be checked and confirmed in the same way.*

As part of the planning process, the Branch Event Project Manager *must book* time to be available to NI staff in advance of key deliverables, for example to sign off on the marketing materials or agree important logistics.

Roles

For clarity, the roles of the Branch and the NI staff team are summarised below. If any changes need to be made to these roles or extra support is required, this must be agreed at the planning stage.

Branch Event Project Manager with support from branch

- Overall responsibility for the delivery of the event to time and budget
- Submit proposal for approval by Events Committee, and any proposed changes (eg discounts)
- Nominate Branch Event Project Manager to lead the project
- Draft project plan, sending to Conference Producer for agreement by NI Staff team. This includes ensuring their availability and time around key deliverables. Agree any changes allowing as much time as possible.
- Check final contract against proposal submitted to Events Committee and sends this to the relevant staff member to sign depending on signing limits (CEO 5k – 1k, Head of Operations – below 1k). If the contract differs from the budget, this must be highlighted and amounts noted as this may affect sign off.
- Provide content for booking for marketing materials – booking form, website, email marketing, event booklet and joining instructions
- Secure sponsorship for event and ensuring sponsorship packages are provided and payment is received.
- Marketing event amongst local contacts
- Draw up list of VIP guests and send invitations
- Liaison with venue and speakers
- Arrangements for and on the day including table plan.
- Wash up meeting at end of event to draft 'lessons learnt'.

NI Staff Team

- Oversight of team support from Conference Producer – point of contact to escalate any issues.
- Agree project plan timescales and tasks through Conference Producer.
- Sign off on contract following approval and confirmation from Branch on the cost.
- Design liaison with relevant designer for the booking form, with content provided to the NI Marketing Officer by the Branch Event Project Manager to include event details, location and prices
- NI Marketing Officer to add event listing to website and conduct set level of email marketing to NI database contacts in accordance with NI policy with content provided by the Branch Event Project Manager