

I M M U N I Z A T I O N
P A R T N E R S H I P



Event Planning Guide for Immunization Coalitions









Acknowledgments

The Immunization Partnership wishes to thank immunization coalitions across the state of Texas for all of their hard work in keeping their communities free from vaccine-preventable diseases.

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THE IMMUNIZATION PARTNERSHIP

The mission of The Immunization Partnership is to eradicate vaccine-preventable diseases by educating the community, advocating for evidence-based public policy, and supporting immunization best practices. Our vision is a community free from vaccine-preventable diseases. All of our projects and programs are developed in concert with achieving the organization's mission.

The Immunization Partnership has three main focus areas that address both the root causes of low immunization rates and the far-reaching policy issues that impact immunization rates in Texas. These three focus areas are:

- Educating families and healthcare providers about immunizations
- Supporting the use of best practices such as electronic health records and Immunization
 Information Systems to document immunizations, and identify children and adults who are not
 fully protected
- Advocating for evidence-based laws and policies on a local, state, and national level that promote high immunization rates.

For more information, please visit www.immunizeUSA.org.

IMMUNIZATION COALITIONS

A coalition is a group of individuals and organizations who work together to address a shared concern and accomplish a common goal. When organizations from a variety of sectors join together, they can often have a greater impact than any one can do alone. They do this by providing a forum to:

- Share ideas and strategies
- Distribute responsibilities and risk
- Build consensus around key issues
- Engage in coordinated action
- Maximize talents
- Build relationships

Because vaccine-preventable diseases impact individuals of all ages and circumstances in a community, coalitions can be important forces for improving immunization rates. Given constraints and limited resources, coalitions are uniquely positioned to promote immunizations by better coordinating and leveraging resources to educate community members and medical teams, advocate for science-based immunization policies, and reduce barriers to accessing vaccines.

For more information, please visit www.immunizeusa.org/coalitions/.



THE EVENT PLANNING GUIDE

The goal of the Event Planning Guide is to assist new and emerging immunization coalitions in building their capacity to improve and sustain high immunization rates. Hosting community events to improve immunization awareness is one way that coalitions can achieve this goal. This step-by-step guide provides tools, resources, and helpful hints to get you started on planning your event. Coalition members or other immunization stakeholders will be able to complete many steps of event planning, though some steps may require the expertise of other professionals. This guide is organized to guide users through a planning process, but users are also encouraged to treat each section independently and adapt the text as needed.

SECTION A:

DEFINE HEALTH EVENTS AND HOW THEY CAN BENEFIT YOUR COALITION

A successful community event requires at least six months of detailed planning before the target date. Immunization coalitions should ask these questions prior to planning:

- 1. What community need will be met through a health event?
- 2. What kind of event will have the greatest impact?
- **3.** What are the goals and objectives of the event?
- **4.** Who should be involved in the planning?

WHAT IS A COMMUNITY HEALTH EVENT?

A community health event provides a unique opportunity to educate the community about immunization through interactive displays, screenings, games, and prizes.

A community health event may:

- Provide immunizations for children and adults
- Increase awareness of personal health
- Increase awareness of community health resources available
- Motivate community members to make positive changes in their health
- Make the community aware of your coalition and what you can do for them

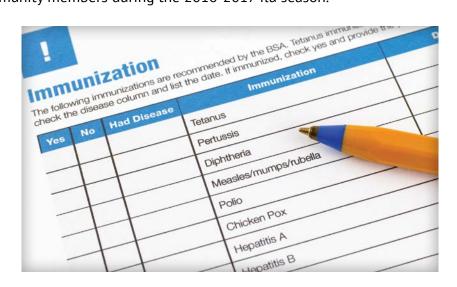


TYPES OF COMMUNITY HEALTH EVENTS

Community health events must be tailored to meet the needs of the community. There is no "one size fits all" template for creating successful events. They will look different each time.

Below are examples of events hosted by immunization coalitions in Texas:

The Andrews County Immunization Coalition (ACIC) conducts a successful flu shot event each December, which requires the coordination of multiple community partners. For example, local medical providers donate the remainder of their influenza vaccine supply, a local grocery store donates space, the local school district donates and distributes posters, and the local health department staff administer the vaccines for free to the community. This event vaccinated over 150 community members during the 2016-2017 flu season.



- The Immunization Coalition of Greater Houston (ICOGH) conducts an event for National Infant Immunization Week (NIIW) called "Operation Baby Bundle." This event provides new moms with baby supplies such as diapers, pediatric medi-spoons, a growth chart/vaccine schedule, several immunization educational pamphlets, and books donated by the members of the coalition. Coalition members bring the donated supplies to an ICOGH meeting and together, they create the gift bundles including a note of congratulations and how ICOGH helps the community. The gift bundles were distributed to 100 appreciative new mothers at participating local hospitals in April 2017.
- The Gregg County Vaccine Awareness Coalition (GCVAC) conducts an "Operation Graduation" event to ensure that graduating high school seniors are fully vaccinated before they head to college. The local school district, health department, and local medical providers partner to host a graduation "party" to vaccinate those in need. The health department verifies immunization status through ImmTrac2 as the seniors arrive at the event, and those students who are not up to date on their shots and/or need the required meningitis vaccine are able to receive same day vaccination.

Other examples of community health events include: educational forums, conferences, stakeholder forums, legislative days, fund raisers, carnivals/county fairs, and health screenings.

SECTION B:

STRATEGIES FOR PLANNING A HEALTH EVENT

STRATEGY #1:

IDENTIFYING AND RECRUITING PLANNING COMMITTEE MEMBERS

The success of a community health event is dependent upon an active and committed planning committee. Determining who needs to be at the table, then actively recruiting and engaging those organizations or individuals, is key to forming an impactful planning committee.

A community health event planning committee is a small group of coalition members (typically 5 – 10 people) who work together to provide leadership, guidance, support, and feedback while planning a specific community health event. The planning committee may be divided into sub-committees to help manage the different topics or tasks, if needed.

Steps to forming a planning committee:

- 1. Recruit a Chair or Co-Chairs The chair or co-chairs lead the event planning committee. The chair or co-chairs promote collaboration, resolve conflict, make decisions, and approve budget requests. The chair or co-chairs must have strong leadership and organizational skills, be detailed oriented, and work well with teams.
- 2. Design Subcommittees Forming subcommittees will ensure that the workload is not placed on a single individual. Subcommittees can be designed around tasks or topic areas, such as budget, vendors, or event activities. The creation of subcommittees can create a sense of ownership over the event, which will increase the likelihood of success.
- **3.** Identify a Champion Champions are influential community members whose opinions are respected and whose support can amplify change efforts. The champion lends credibility to your cause by being associated with your group and acts as a conduit to concerns held by the community at large. They may understand community history or have institutional knowledge that provides a perspective necessary for a successful event.

The planning committee may want to consider recruiting members representing traditional and non-traditional partners to make a successful event.

PARTNERS

Traditional Partners	Non-Traditional Partners
Health departments - local and state	Elected officials
Health systems such as hospitals and clinics	Volunteer organizations
Schools	Funding organizations
Vaccine manufacturers	Businesses and chambers of commerce
	Local medical societies
	Health plans
	Teaching institutions
	Faith based organizations
	Pharmacies



ESTABLISHING AN EVENT TIMELINE

The event planning committee must establish a timeline working backwards from the date of the event to the current date. Timelines are vital to keeping tasks on track, which leads to a successful event. If a detailed timeline is not developed, important deadlines can be missed.

Timelines include the following:

- Deadlines
- Vendor information
- Speaker information
- The responsible party for each task



O Decide on topic/audience

O Obtain approval from management

O Select planning committee members

O Committee selects a chair/co-chair

O Form subcommittees, if needed

O Develop your goals

O Prepare a budget

O Finalize the date, time, and confirm the location

O Identify possible sponsors, services, exhibits, and/or activities

O Determine if you will charge for registration or exhibit space

O Determine if you will offer CEUs



O Develop materials, including evaluation forms, an event logo, promotional media (i.e. for print, Internet, TV, radio, email), and a letter for vendors and product donors about the event

O Confirm vendors who have agreed to participate; continue recruiting!

O Set registration method

O Determine types of presentations and engage speakers

O Establish target population for marketing

O Recruit event volunteers, establish responsibilities, and create a work schedule

O Promote event





- O Check in with committee leadership, speakers, volunteers, and location contacts
- O Contact vendors to double check all details
- O Prepare and print all materials
- O Promote, promote, PROMOTE!



DAY

BEFORE

- O Set up tables, booths, exhibits, chairs, classrooms, etc.
- O Set up evaluation area, including forms for exhibitors and participants
- O Set up food and registration areas
- O Conduct final day of run through with volunteers
 - O Bring the "be prepared for anything kit"
 - O Promote, promote, PROMOTE!



EVENT

O Arrive early, well before the event begins

- O Meet with volunteers to answer questions and assign tasks
- O Meet vendors, assist with setup as needed
- O Announce and thank the speaker, volunteers, and committee members
- O Answer logistical questions, locate booths on the floor plan, locate bathrooms and emergency assistance
- O Take pictures and post to social media!
- O Close the event by thanking everyone for coming
- O Collect the evaluation forms from the drop box

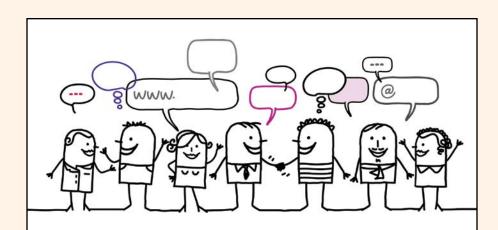


POST

EVENT

O Analyze evaluations

- O Conduct postmortem; develop a list of lessons learned and debrief with planning committee and coalition at-large
- O Utilize social media for continued community engagement
- O Send thank you notes to the committee, volunteers, sponsors, and others that helped make the health event a success



STRATEGY #3:

ESTABLISH A BUDGET

Budgeting tools do not have to be fancy, but it is essential to develop a budget early on in the planning process. The planning committee will need to account for all revenue and every expense.

Things to consider when establishing a budget:

- The budget should be realistic and detailed
- Use a spreadsheet to track revenue and manage expenses
- Determine how the event is going to be funded
- Make sure the planning committee is in agreement with how the money will be spent
- Divide by category for easy reference
- If an exact cost is not known, take time to research for an accurate estimate
- Know when bills are due and include those dates on the spreadsheet
- Identify a person to keep track of and sign off on all expenses related to the event (the chair or co-chairs should have regular updates)

RESOURCE

Budget Template on page 20



STRATEGY #4:

CREATE GOALS AND LEARNING OBJECTIVES

The type of health event an immunization coalition conducts is determined by the needs of the community. The planning committee will create an event to address those needs, and then identify the goals and objectives for the event.

Clearly defined goals and objectives will keep the planning committee on track and avoid wasting resources, such as time and money.

GOALS

A goal is the "big picture" of the event. It defines what you are trying to achieve through your event, in other words, WHY the event exists.

OBJECTIVES

Objectives are clear, measurable steps towards meeting that goal. Objectives are the "roadmap" of your event and must relate back to the goal. Health events may have 2-4 learning objectives.



Concrete, specific objectives are critical to shaping and evaluating the health event. One way to design strong objectives is to make them "SMART!"

It's important to keep objectives limited to only one measurable action, so that it is clear whether the objective was achieved.

The clearly defined goals and objectives should be a focal point throughout your entire event planning process. They will help quide venue selection, partnership engagement, sponsorship opportunities, and post-event evaluation.



SECTION C:

STRATEGIES FOR ENGAGING COMMUNITY MEMBERS AT HEALTH EVENTS

STRATEGY #1: SELECTING THE LOCATION AND DATE

Selecting the location for the community health event can be a daunting task. When selecting the location, it is important to keep the goals and objectives for the event in mind, as they will help determine the type of space necessary for success.

Things to keep in mind:

- Is the event venue in a convenient location for maximum participation?
- Can people arrive safely via private or public transportation?
- Is there adequate free parking for a large turnout?
- Is the location large enough to fit all attendees and volunteers?
- What is traffic like in the area? Will you need to hire a public safety officer to help direct traffic?
- Are there other community events already on the calendar that you can partner with? (This is a
 great option for a small event or if you have a small budget.)
- Is there a backup location in case the first location is unavailable?

Once the site is chosen, the available dates might be narrowed down by site location availability. Here are some important things to consider when choosing a date:

- Holidays do not schedule on a holiday
 - o New Years
 - o Memorial Day
 - o July 4th
 - o Labor Day
 - o Thanksgiving
- Religious observances
- Federal holidays
- Peak event time is from February to June and again from September to November. If you plan
 an event during these months, it may be more expensive to rent a venue or the venue may have
 a scheduling conflict. It is important to be aware of planned community events so that double
 booking does not occur, unless a joint event is preferred.

STRATEGY #2:

EVENT VENDORS

When engaging vendors, start by taking an inventory of who is involved in the immunization coalition and the organizations that they represent. Coalition members may already have connections to local vendors. Once an assessment is done, then revisit the goals and objectives of the event to see which partners or vendors may be missing. Immunization coalition members should be asked to reach out to their vendor contacts and the planning committee should reach out to vendors who are not already working with a coalition member to gauge interest in participating.

It is important to reach out to vendors early, as this will increase the likelihood they will be able to participate. When the planning committee secures the vendors early, the event will be successful and the goals and objectives will be met.

Suggestions for securing vendors and exhibitors:

- Develop a list of potential vendors and exhibitors relevant to the goals and objectives of the event
- Ask if coalition members have contacts on the list
- Ask coalition members to contact potential vendors and exhibitors as early as possible by
 - o Making a phone call to gauge their interest
 - o Sending an email with the location and date of the community health event, a description of the event, an estimate of the number of attendees, and how their participation will add value to the success of the event
- Ask vendors and exhibitors to sign an agreement to lock in their participation



STRATEGY #3:

EVENT SPEAKERS

Community health events can include a wide range of activities; not all immunization events need to provide immunizations! If a community health event is going to be educational, the immunization coalition planning committee needs to think carefully about who would be the best speaker for the event.

The best way to brainstorm about potential speakers is to think about which type of presentation would be most beneficial to the community. The type of presentation needs to align with the goal and objectives of the event. Some speakers may be more comfortable with one form over another.

Types of presentations:

- Panel This involves a group of speakers (at least 2, no more than 4) that makes an orderly presentation on an assigned topic. The audience may or may not ask questions or participate in the discussion. A moderator is recommended to encourage interaction between panelists and the audience.
- Speech It is usually one-way communication, though the audience may be invited to ask questions.
- Interview Using this method, one or more speakers respond to questions from an interviewer.
- Dialogue This type of presentation requires a high degree of skill in the topic area. Two speakers discuss issues in an in-depth conversation, but their views don't need to be different or opposing.
- Role Playing This presentation uses participants to act out real-life situations. There is no script; players' actions are spontaneous. A discussion with the audience usually follows the role-play.
- Skit This is a short rehearsed presentation with a planned script. The purposes of a skit are varied – to entertain, to shock, to illustrate, or to provoke thought. The audience may or may not participate.

Once the type of presentation is decided, it is time to reach out to the potential speaker(s). Well known speakers have very busy schedules and may be hard to book (just like the vendors, the earlier the better). When contacting the potential speakers, it is important to have the event logistics like the location, date and time, the topic for the presentation, the type of presentation the committee would like to have, and a speaker form prepared. This form should have space for the speaker's contact information, credentials, biographic information, and any legal forms, like photo release, all in one document. This will make it easy for the speaker to get all the necessary information to the planning committee in a timely manner.

Speaker Information Form on page 22

SECTION D:

STRATEGIES FOR EVENT PROMOTION

Even the best community health events are only successful if the community knows about them. The planning committee should create a subcommittee dedicated to the promotion of the event.

Some commonly used methods for event promotion are:

- Flyers or posters
- Brochures
- Calendar invites
- Postcards
- Social media posts
- News coverage
- TV interviews
- Ads in the local newspaper

Promotion should start early and continue through the event day. This cannot be stressed enough. **PROMOTE, PROMOTE!**



SECTION E:

STRATEGIES FOR EVALUATION

Event evaluation allows the planning committee to determine if the event goals and objectives were met. It also tracks the event's successes and can identify areas of improvement. Evaluation data helps members stay engaged and can help secure financial support for activities and other community health events in the future.

The following activities break down the evaluation process into easily achievable steps. Coalition members and/or outside consultants should follow the steps sequentially to obtain valuable perspective.

An effective evaluation plan for a community health event will include the following:

- A description of how each objective will be measured
- A description of how data will be collected and analyzed
- Identify a coalition member whose role is to record and report data
- A plan to report evaluation findings to the coalition members and other stakeholders

Create a process for informing coalition members and other stakeholders about progress on your goals and objectives. Your event planning committee may:

- Create graphs or charts to visually track measures
- Plot data over time to observe trends and other patterns when comparing data from multiple events
- Use email or listservs to disseminate findings
- Report updates at regularly scheduled immunization coalition meetings

RESOURCE

Evaluation Form on page 26

SECTION F:

RESOURCES



Resource A: Budget Template

EVENT BUDGET WORKSHEET

CATEGORY		PROJECT SUBTOTAL
Venue	SUBTOTAL	0
Location Rental		
Equipment Rental		
Additional Tables / Chairs		
AV Equipment		
AV Staff		
Venue-Specific Staff		
Venue-Specific Catering		
Wi-Fi		
Venue Tech Support	·	
Security		

Décor	SUBTOTAL	0
Linens		
Lighting		
Additional Signage		
Additional Furniture		
Additional Decorative Items		

Food / Beverage	SUBTOTAL	0
Food		
Beverage		
Catering Staff		
Bar		
Additional Bar Staff		
Additional Coffee Cart		
Take-Away Food / Beverage	ge	

CATEGORY		PROJECT SUBTOTAL
Event Programming	SUBTOTAL	0
Speakers		
Performers		
Video Production		
Presentation Graphics		
Interpreters		

Additional Entertainment	SUBTOTAL	0
Music / DJ		
Gaming Rentals		
Additional Rentals		

Event Documentation	SUBTOTAL	0
Photographer		
Videographer		

Attendee / Guest Services	SUBTOTAL	0
Transportation		
Accommodation		
Storage		
Charging Stations		
Swag		
Giveaways		

Registration	SUBTOTAL	0
Software		
ID Production		
Signage		



Projected Total	\$
•	

CATEGORY		PROJECT SUBTOTAL
Communications	SUBTOTAL	0
Mobile App		
Printing / Fabrication		
Additional Signage		
Packets		
Flyers		
Maps		
Schedules		
Event Materials		

Public Relations	SUBTOTAL	0
Announcements		
Graphics		
Press Releases	·	

Marketing	SUBTOTAL	0
Email Marketing		
Surveys		
Video Production		
Photography		
Design		
Printing		
Postage / Shipping		

Social Media	SUBTOTAL	0
Email Marketing		
Surveys		
Video Production		
Photography		
Design		
Printing		
Postage / Shipping		

CATEGORY		PROJECT SUBTOTAL
Advertising	SUBTOTAL	0
Online		
Print		
Outdoor		
Radio		
Television		
Postage / Shipping		

Marketing	SUBTOTAL	0
Acquisition		
Communication		
Complimentary Passes / Tickets		
Thank You Gifts		

Logistics	SUBTOTAL	0
Insurance		
Contracts		
Permits		

Other	SUBTOTAL	0

SECTION F:





Resource B: Speaker Information Form First Name: _____ Last Name: Credentials: **Contact Information** Mailing Address: Street: ______ Building/Apartment: _____ City: ______ Phone: _____ Assistant's Phone: Assistant's Email: **Biographical Information** College/University: _____ Additional Degrees: ______ Please enter any other educational information you would like to provide here: Bio Sketch (125 words max) Please send a copy of CV for CEU application purposes to [enter appropriate email here].



Presentation Information Audio/Visualization Requirements and Handouts ☐ Will bring Apple laptop ☐ Will bring PC laptop ☐ Will bring flashdrive/need laptop Provide projector with screen ☐ Will provide handouts I give my permission to include my presentation in all online materials ☐ Yes □ No **Conflict of Interest Statement** All speakers and moderators must disclose all relevant financial relationships with any commercial interest. Should it be determined that a conflict of interest exists as a result of a financial relationship you may have, this will need to be resolved prior to the activity. In order to do this, please provide the following information in order for us to be able to move to the next steps in planning this activity. If you refuse to disclose relevant financial relationships, you will be disqualified from being a part of the forum. Name of Activity: Date of Activity: Please list the names of proprietary entities producing health care goods or services, with the exemption of nonprofit or government organizations and non-health care related companies with which you or your spouse/partner have, or have had, a relevant financial relationship within the past 12 months. For this purpose, we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours. 1. _____



Resource B: Speaker Information Form, continued

INALI	ature of retevant infancial relationship.			
	Grant or research support			
	Paid Consultant			
	Speaker's Bureau			
] Employment			
	1 Honoraria			
	Membership on advisory committees or review panels, board members, etc.			
	Ownership Interest (e.g., stocks, stock options, or other ownership interests, excluding diversit mutual funds)			
	Other relevant financial or material interests (please specify below)			
	I do not have any relevant financial relationships with any commercial interests.			
	ommercial Interest: Provide Name of Company/Companies associated with financial relation elected above	ship 		
the l	y decisions regarding program content and teachers/authors chosen will be aligned with whe best interests of patients and public health and not a specific proprietary business interest ommercial entity:			
] Yes			
] No			
Sign	gnature Date			



Resource B: Speaker Information Form, continued

Media Authorization and Release

I hereby consent to having my photograph taken, and I hereby give The Immunization Partnership permission to capture my name, likeness, image and/or voice in photographic, audio, audiovisual, digital or any other form of medium (the "Media Materials"); and to use the Media Materials for any purpose (including any and all business, educational, professional, or fund raising activities), in any manner, in whole or in part, and in its sole discretion.

I und	lerstand and agree that:
	The Media Materials are the property of The Immunization Partnership,
	The Media Materials may be released to the public by The Immunization Partnership, and may be provided to and distributed through the news media, including the broadcast, print and/or Internet media, and
	My name and title may be used in connection with the Media Materials.
I her	eby waive any right to inspect or approve:
	The Media Materials,
	Any printed matter that may be used in conjunction with the Media Materials, and
	The eventual use of the Media Materials.
conn exhil Partr	dition, I hereby waive all rights, interest, or claims for payment or other compensation in ection with the Media Materials, including any use, copying, distribution, publishing, display, pition or release of the Media Materials by The Immunization Partnership; and The Immunization nership officers, agents and employees from any and all liability in connection with the Media crials.
Signa	ature Date

SECTION F:





Resource C: Evaluation Form Location: Date: Please complete this evaluation questionnaire related to the event you participated in. Your anonymous responses will be used to revise this activity and to plan future activities. Circle the number that best fits your evaluation of this activity. Thank you for your participation and your feedback! 1 = Not at all **2** = Somewhat **3** = Almost Completely **4** = Completely Rate your achievement of the following objectives: Develop a shared understanding of the current state. 1 2 3 4 1 2 *Identify the assets* 3 Identify key issues 1 2 3 4 Were the objectives relevant to the overall purpose? 1 2 3 4 Were the methods/strategies effective? 1 2 3 4 What was most helpful about the Strengths, Weaknesses, Opportunities and Threat workshop? What was least helpful about the Strengths, Weaknesses, Opportunities and Threat workshop?

Rate the expertise/effectiveness of each presenter

[INSERT PRESENTER'S NAME]

SECTION F:





Notes	
	-

The Immunization Partnership

www.immunizeUSA.org Phone: (281) 400-3689

E-mail: info@immunizeUSA.org

facebook.com/immunizeUSA • 💆 @immunize_USA