

## Guide to Planning an IHI Open School Chapter Event

This guide can help Chapters plan successful events based on recommendations and experiences from Chapter Leaders. It describes action items within a timeline to help you make sure your event runs as smoothly as possible.

### Three Months Before

- Generate ideas for your event based on Chapter or community resources and needs
- Create an aim statement for your event (how good by when)
- Secure event funding, if applicable
- Identify individuals to run and coordinate your event
- Contact presenters and facilitators if applicable
- Determine 1-2 potential times, dates, and locations to host event
- Identify how you will promote your event in your community (e.g. email Listservs, bulletin boards)

### One Month Before

- Finalize idea and create event agenda
- Finalize event budget, if applicable
- Confirm presenters and facilitators
- Secure room/location for the event
- Create promotional materials and begin distributing among target audiences
- Create a list of needed materials for event and identify who is responsible for bringing those materials (e.g. PowerPoint, food, supplies for activities)

### One Week Before

- Follow up with individuals responsible for bringing supplies/materials (be sure to keep receipts for reimbursement if needed)
- Final promotional push to target audiences
- Distribute and review agenda with event facilitators
- Confirm which leadership team members will be present, and what time everyone should arrive to set up
- Meet with team and facilitators to finalize details for activity, if needed
  - If the event involves a game or activity, this is a great opportunity for a “dry-run” to work out the kinks before the day of

### Day of the Event

- Send a reminder email in the morning of the event to Chapter members
- Have materials delivered to the event location (e.g. food, paper and pens, etc.)
- Arrive early to set up, move tables, put up slides, etc.
- Put out sign-in sheets to get contact information as people arrive at the event
- Host event!
- Celebrate and clean up

## One Week After

- Email event attendees with information on your Chapter and upcoming events (including your next general meeting)
- Ensure all individuals have been reimbursed for out-of-pocket expenses
- Debrief the event: what went well, what could be improved, lessons learned, and next steps
  - Sometimes this can be a brief 10-15 minutes after the event itself! No need to wait.
- Send thank-you notes to presenters and facilitators

Find the full list of IHI Open School resources [here](#).