

PLANNING YOUR GRADUATION EVENT

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CHCI's Nurse Practitioner Residency Training Program

*A Step-by-Step  
Guide*

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## Tips for Getting Started

It is important to anticipate the end of the NP residency program year by planning an event to celebrate your residents' achievements. Deciding upon a large event or an intimate celebration will depend on many factors, including your budget and the number of residents graduating, however, the success of your event, large or small, depends on good planning.

A few tips for success:

1. Start planning early
2. Assemble a Team and Identify Stakeholders
3. Create a Task List with Timeline
4. Document everything

## Start Planning Early

Regardless of the size of your event, we recommend that you start planning early. If you are a new program and this is your first graduation, we recommend that you begin planning 5-6 months before the anticipated graduation date. As your program becomes more established, graduation planning should become easier, especially if you maintain excellent records. This guide contains helpful checklists and timelines which will guide you as you plan your event.

## Assemble a Team/Identify Stakeholders

The first step in planning your event is assembling a planning team and identifying your stakeholders. Your team should consist of the individuals who are directly helping you plan the event. One benefit of identifying your team members early is to help you identify and understand the available resources. Try to be thorough in thinking through who you might need to engage as you plan your event. For example, will you be working with facilities if you plan to have the event at your health center? Including a representative from the facilities department early in the planning stages may help you avoid unexpected pitfalls later.

Also, take some time to identify any stakeholders early in the planning stage as they may not be involved directly in planning but may have access to resources or decision making authority that will be needed for the event (approving budgets for instance). For example, your stakeholders might include your Program Director and CEO and while they may not be involved in the day-to-day logistics of planning the graduation, they should be kept in the loop regarding key aspects of the event such as the program, attendees, etc.

## **Create a Task List with Timeline**

This step will help you stay organized as you take larger tasks and break them into smaller action items. Your task list and timeline should be an active, working document that is reviewed weekly in the early stages and then even more frequently as the event date gets closer. When developing your task list, list out all your big tasks first and then break those big tasks out into the individual steps it takes to accomplish them. For example, to secure a venue you may need to conduct research, visit specific venues, sign the contract on your chosen venue, and submit a down payment.

**Here is a list of tasks to consider adding to your timeline:**

### **Graduation Planning Checklist**

#### 4-6 months Check-list

- ✓ Set a date and time
- ✓ Send Save-the-Date
- ✓ Develop a Budget
- ✓ Choose a Venue
- ✓ Develop a Guest List
- ✓ Menu
- Begin thinking about Program & Gift

#### 2-3 month check-list

- ✓ Review and finalize your Guest List
- ✓ Send invitations
- ✓ Plan your Program
- ✓ Schedule a Photographer
- ✓ Create Certificates & Get Signatures
- ✓ Order Gifts
- ✓ Finalize menu
- Begin thinking about Decorations

6 - 8 week check-list

- ✓ Collect RSVPs
- ✓ Continue working on Program and Develop Event Briefing

1-2 week check-list

- ✓ Confirm with all vendors/contributors (caterer, photographer, venue)
- ✓ Send reminders to all guests
- ✓ Finalize program/event briefing and confirm with all contributors

After the event

- ✓ De-brief – Meet with key individuals to celebrate successes and review lessons learned for next time.

**Suggested Color Code Key and Sample Task List and Sample Timeline:**

Most Urgent – deadline < 2 weeks
Time Sensitive – deadline 2-4 weeks
Not urgent – deadline > 4 weeks
Complete (white, no color coding)

Another helpful practice when managing your task list/timeline is to color code the rows by urgency so that you can assess at a glance which items are most time sensitive vs. which items can wait, or are complete.

Category	Task	Deadline	Assigned To	Status	Comments
<b>Venue</b>	Research Venues	1 month ago	Program Coordinator [insert name]	Complete	
	Visit Venue A	1 month ago		Complete	
	Visit Venue B	1 month ago		Complete	
	Send down payment Venue A	This week	Program Coordinator [insert name]	In Process	
	Sign contract venue A	This week			
	Confirm venue and set-up	1-2 weeks prior to event	Program Coordinator	Not Started	
<b>Invitations/Attendees</b>	Email residents to see who plans to have family attend	2-4 weeks	Program Coordinator	Not Started	
	Collect RSVPs	6 weeks	Program Coordinator	Not Started	
	Invite internal preceptors				
	Invite MAs and Nurses from each site				
	Invite external specialty providers				
<b>Menu</b>	Finalize Guest List	1 week prior to event			
	Coctail Buffet				
<b>Program</b>	Invite preceptors to speak				
	Invite residents to speak				
	Create event brief (find last years agenda on shared drive)				
	Email event brief to all speakers	1-2 days before event			
<b>Certicates and Gifts</b>	Order 10 frames				
	Confirm Resident Credentials for Certificates (DNP, FNP-BC, NP-C)				
	Create Certificates				
	Get signatures from leadership (i.e. CEO and Chairman of Board)		Executive Assistant [insert name]		
	Frame certificates				
<b>Photography/Videography</b>	Order gift				
	Gift and framed photo in a gift bag with tissue paper				
	Identify photographer		Communications Coordinator [insert name]		
	Confirm photographer	1 week prior to event			

## **Document Everything**

Carefully documenting your planning activities is an absolutely critical element in planning your event as it will save a tremendous amount of time and effort in following years. You will want to save all documents related to planning your graduation event in one location for ease of use. The added benefit of using the task list/timeline method described above is that all the steps involved in each category are clearly outlined in detail. This is an extremely helpful tool for developing and maintaining organizational memory. You will likely adjust the timeline and specific tasks from year to year as you assess and evaluate your event planning process but it is helpful and efficient to quickly create a new task list each year by copying over the previous year and making needed adjustments.

## **Choosing a Venue**

The earlier you can choose your venue, the better – particularly if you are planning your first graduation, or considering booking a venue you've never booked before. Try to book your venue 4-6 months in advance to allow time for planning the other details. When choosing your venue, you will want to consider the following:

1. Location
2. Venue Capacity
3. Layout
4. Services and Amenities
5. Parking

### **Location**

You will want to consider the location of the event in relation to the distance that people will be traveling from work to get there, start time, etc. For example, if there are preceptors who will be traveling an hour to the event, you may need to block their last appointments of the day in order to allow them travel time to get to the graduation. You may want to opt for a venue within a reasonable distance from most attendees' homes or places of work.

### **Venue Capacity**

You will want to have an estimate of how many people you are inviting in order to determine the capacity needed for your event. It is also important to ask if there are food and beverage minimums at your chosen venue.

## **Services and Amenities**

Consider if the venue has a kitchen or if you will need to order catering separately. As you research venues, you should consider the following:

- Do they provide tables, chairs and linens ?
- Do they provide set-up and clean-up?
- Are there AV capabilities?

## **Layout**

While you are likely choosing a venue early in the planning process, it is important to consider what types of activities you will have at your event and if the layout is conducive to those activities. The layout and floor plan will affect aspects of your event. Think about the traffic flow, setting up the tables, where you will display and/or distribute certificates and gifts, and identify an area where your identified speakers will stand when speaking.

## **Parking**

You should identify parking options and include that information in your invitation if the event is not at your health center and guests will be driving.



## Guest List & Invitations

It is important to let people know when the event is happening early so that it is marked on their calendars. It is beneficial to begin thinking about your guest list as you begin researching venue options as they are integrally connected. Important tasks to consider when planning your graduation are:

1. Develop your Guest List
2. Create and Send your Save the Date
3. Send Invitation
4. Collect RSVPs

### Developing your Guest List

Your guest list will be partially determined by your budget, venue and the number of graduates. As you think about your guest list, it is an excellent time to think about any opportunities to leverage the event. The primary goal is to celebrate the residents' achievements; however, there may be other secondary goals that should also be considered in advance. Is there a leadership member who has been extremely supportive of the program, or perhaps a leader who you would like to see more involved in the future? Graduation is also an excellent forum to acknowledge and thank your preceptors or specialty providers, get more press for the program and increase buy-in from an individual or group. By thinking about your event in this way, you can plan for and leverage the opportunity for intangible, less obvious benefits.

Your guest list may consist of the following:

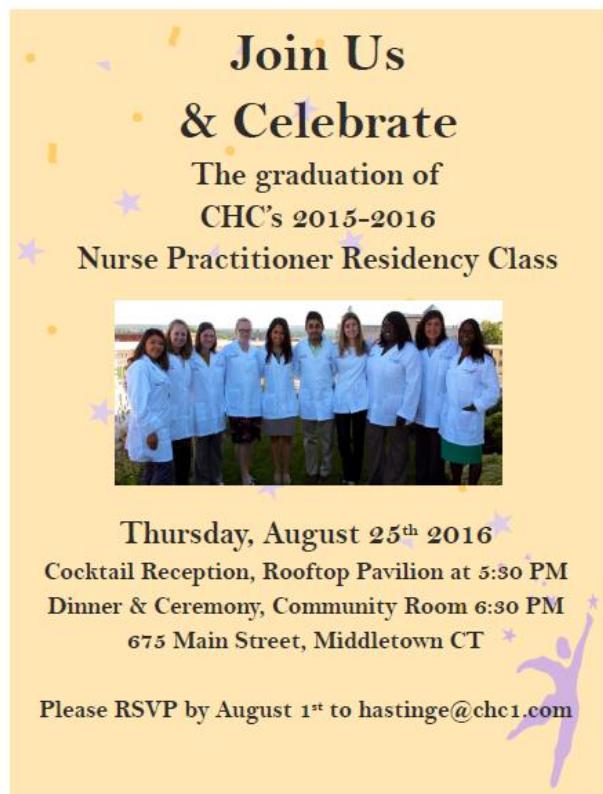
- Residents and 1 or more guests (i.e. family member, friend)
- Preceptors
- External specialty providers
- Board members
- Health Center Leadership
- Other stakeholders

## Save the Date

Your save the date should be sent out 4-6 months before the event. An electronic Save the Date is an efficient option. If your guest list consists of mostly staff at your health center, a simple outlook invitation might suffice.

## Send Invitation

There are many free templates available including Microsoft Publisher, to create your invitation.



## Collect RSVPs

It is helpful to collect and track your RSVPs by creating a second tab on your task list/timeline. This allows you to easily move between tasks while staying in one document thereby reducing the number of clicks and improving efficiency. This practice also contributes to staying organized and contributing to organizational memory.

## Planning Your Menu

When it comes to your guests' enjoyment of the event, food and beverage are always an important consideration. When planning food for your event, you should consider the following:

1. Time of Day
2. Dietary Restrictions
3. Whether alcohol will be included

### Time of Day

The time of day will be an important consideration when meal planning for your graduation. Regardless of the meal in consideration, you will need to decide whether to have the meal plated or buffet. Plated meals require more program time and are generally more expensive. Buffet style is generally a more economical option and provides guests more choice.

### Dietary Restrictions

It is critical to incorporate and notify your caterer about any special requests and needs that your guests may have including, but not limited to:

- Food allergies
- Religious restrictions
- Other dietary restrictions

You can ask about food restrictions in your invitation/RSVP process. You may also want to err on the side of caution by providing vegan or nut free options. It is also a nice touch to type up a menu for each table with information about ingredients (i.e. nut free, vegan, etc.).

### Alcohol

The decision on whether or not to serve alcohol at your event is highly individualized and will be based on you budget, time of day and other priorities as a program and organization.

## **Planning Your Program**

This is arguably the most important part of the event. When planning your program, you should consider the following:

1. Activities – Flow and Timing
2. Developing an Event Briefing
3. Guest Program

## **Activities – Flow and Timing**

There are endless options when it comes to planning activities for your event. You will want to consider your budget, venue and any regional or organizational cultural factors that might be relevant. You may want to include speeches by your organizational or program leadership, the residents themselves, preceptors, or maybe a local health champion. You will likely want to plan time for distributing the graduation certificates and gifts. You will need to plan some time for casual socializing as well. You may want to include live entertainment or show a video montage of the resident's experience.

Once you have decided which activities you would like to incorporate into your event, you must get them scheduled. The final step is outlining the program schedule and sharing this information with other planners and anyone involved in the program (i.e. speakers, entertainers, etc.)

Your event briefing is a complete outline of all the activities that will take place.

## **Developing an Event Briefing**

Here is a sample event briefing. This document is for internal use to be shared with people who have a role in the program including your Master of Ceremonies and speakers. This document does not need to be shared with guests. This document serves a dual purpose of creating organizational memory for your next event.

**Nurse Practitioner Residency Graduation  
Class of 2017-2018  
Sample Event Briefing**

Coordinator Contact:

Time:

Location:

Purpose:

5:30-6:30-      Cocktail reception on the roof  
6:30pm-        Salads & Buffet  
6:45pm-        Master of Ceremonies welcomes everyone  
6:50 PM:        Vice President – Welcome & remarks  
                    Chief of Nursing – Brief Remarks  
                    Chief Preceptor – Brief Remarks

7:15pm - Emcee will invite the residents and preceptors from each site to come up. A preceptor from each site will introduce each resident. Residents will have the opportunity to say a few words. Gifts and certificates will be presented.

**Site A:** Resident 1 & Resident 2

**Site A Preceptors:** Preceptor 1, Preceptor 2, Preceptor 3, Preceptor 4

- Preceptor 1 introduces Resident 1; presents certificate/gift. Resident 1 will say a few words.
- Preceptor 2 introduces Resident 2; presents certificate/gift. Resident 2 will say a few words.

**Site B:** Resident 1 & Resident 2

**Site B Preceptors:** Preceptor 1, Preceptor 2, Preceptor 3, Preceptor 4

- Preceptor 1 introduces Resident 1; presents certificate/gift. Resident 1 will say a few words.
- Preceptor 2 introduces Resident 2; presents certificate/gift. Resident 2 will say a few words.

7:45 – Master of Ceremonies will play short video montage

8:00 – Event ends

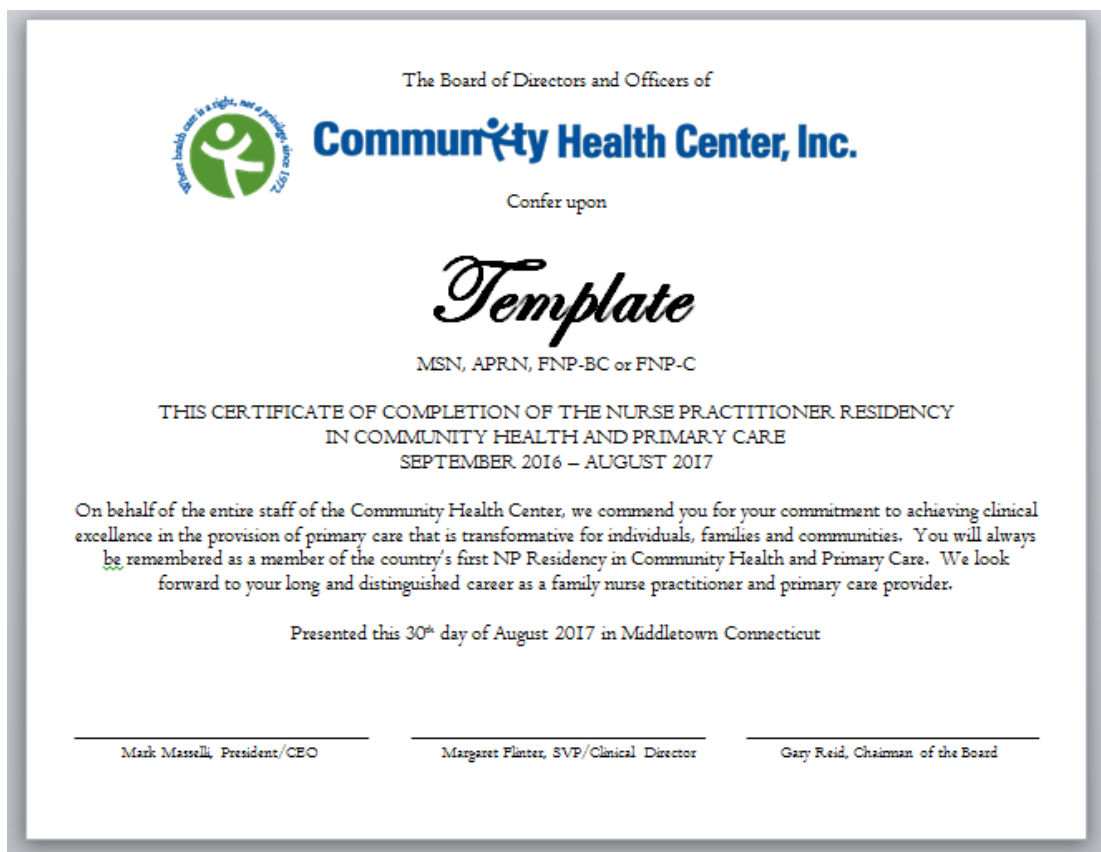
# Creating a Guest Program

You may want to create a program for your guests that is a cleaner, more appealing version of your event briefing. This is a nice additional step, though not always necessary. If you were to take the previous sample event briefing, your program might look like this:



## Graduation Certificates

You can quickly and easily design your own certificate to print in color on card stock or specialty paper. The signed certificate should be placed in a nice frame. CHC can provide a template for your program to edit and use.



## **Graduation Gifts**

It is a nice gesture to provide a personalized graduation gift to the graduates. Your gift choice will depend on many factors including your budget and regional or organizational culture.

Some possible graduation gift ideas include:

- Engraved clock
- Engraved Journal
- Framed Photo of Graduating Cohort

Possible vendors for unique graduation gifts include:

- Things Remembered
- Etsy
- Uncommon Goods