

Deeper Dive: Program Planning

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PLEASE NOTE: All Annual Planning articles will be updated by end June 2026 for 2027 planning

Member Leader Training for the Annual Planning Process is now available in the HBA Academy!

Please use Map the Metrics Engagment and Events Workbook.pdf as a supplemental tool to assist Education and Events teams with curating a thoughtful, high-impact event plan.

High-level details for 2026 and key dates

- 2026 Global Program Master Events List and guidance to be shared in mid-June
- **High-level 2026 program plans are due as soon as possible, but no later than the end of July** to HBA via the 2026 Master Events List (formerly Global Planning Calendar in AirTable) and Regional Treasurer
 - High-level = number and type of events only, along with the quarter (or month) they will take place
 - Don't overcommit!
 - Work with Corporate Relations to develop programming based on the needs of partners in the region and for sponsorship insights
 - Share program plans with the Regional Treasurer as soon as complete for incorporation into the budget
- **Detailed Q1 plan due end November**

Who does what?

- Region/Chapters: The Education and Events department oversees the process and guides to locations
- All component levels (location, region, chapter, affinity group) must input the programs and events for their area.

Annual Program Planning Guidance

Annual Program Planning involves mapping out the high-level plan of events for the upcoming year to create the overall member experience across HBA Locations, Regions, and Affinity Groups (AGs). This guide will help you understand the process, responsibilities, and key considerations for effective planning.

HBA is not requesting a full calendar of events; it simply asks for your general intentions for the number/type of events, time of year, and frequency by the end of July 2025. Detailed Plans should be completed by the end of November for Q1 of 2025 and subsequent quarters by the end of the previous quarter.

Responsibilities

- **HBA Locations & Regions:** Develop plans with oversight from the Regional Education & Events departments, who oversee planning, encourage collaboration, and ensure submission.
- **Global Affinity Groups:** Develop and submit their plans. Cross-affinity collaboration, support, and best practice sharing are encouraged.

Importance of Annual Planning

- **Advance Planning** ensures a cohesive experience, enhances transparency, and is crucial for budgeting and identifying sponsorship opportunities.
- **Event Planning:** Helps generate revenue and creates the member experience for your area.
- **Reduces volunteer burnout:** developing a plan helps focus on quality and impactful experiences rather than quantity.

Event Format Guidelines (see HBA Events-at-a-Glance)

- **Regions & Global Affinity Groups:** it is recommended that Regions and Global components primarily conduct **virtual events**, given membership is not location-specific, with exceptions for signature events.
- **Locations:** it is recommended that HBA Locations primarily conduct **in-person events** to provide a robust local experience. The HBA suggests each Chapter host:
 - **Educational Events:** 2-4 per year
 - **Networking Events:** 6-12 per year
 - **Recruitment Events:** 6-12 per year

Focus on crafting impactful events rather than strictly meeting quotas.

Annual Program Planning Steps

Step 1: Brainstorming

- Review past processes and event effectiveness.
- Gather feedback from members and assess sponsor relationships.
- Determine event numbers based on volunteer capacity and member needs.

Step 2: Data Collection

- Access “My Reports” in your HBA profile.
- Pull the Regional Event Attendance Summary Report and review event survey results.

Step 3: Formulate Your Plan

- Use past event data to inform your 2026 plans.
- Identify gaps and areas for new topics or formats.

Step 4: Submit High-Level Plan

Due Date for 2026 Program Plan Submission: 25 July 2025

- Submissions should be made in the 2026 Master Events List
- High-level details should include:
 - Quarter and Month
 - Potential Educational Topics
 - Event Types and Formats
 - Your component: Region and/or Chapter or Global AG
 - Estimated Attendance, Pricing, Potential Sponsorships and Expenses (if known) to inform Budget Planning

Step 5: Submit Detailed Plans

Due Date: end of November 2025 for Q1 2026, then quarterly

- In detailed planning, please complete the build-out of the entire quarter's calendar to include more specific details, such as speakers, dates, sponsors, etc., in the 2026 Master Events List.

Post-submission plans will coordinate budget planning and can be used by Corporate Relations teams to explore sponsorship opportunities.

Step 6: Ongoing Management

- **Monitor Events:** Track event progress and compare actuals to estimates.
- **Adjust Plans:** Refine plans based on member feedback and sponsorship opportunities.
- **Communication:** Maintain cross-functional communication with Marketing, Corporate Relations, and Member Engagement.

Key Actions for Volunteers

- Input your high-level Program plans by the end of July to the 2026 Master Events List.
- Update the Global Planning Calendar with Q1 details by November 30.
- Regularly update and refine event details.
- Ensure events are opened for registration *at least* 4 weeks in advance.

Please contact events@hbanet.org should you need additional clarity or support in your planning.
