Deeper Dive: Program Planning

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

Please use Map the Metrics Engagement 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 2027 and key dates

- **2027 Global Master Events List and guidance (below) are now available**
- **High-level 2027 program plans are due as soon as possible, but no later than 14 August** to HBA via ***the 2027 Global Master Events List*** 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. Budgets and program plans should be developed in tandem and continually refined to align with budget objectives, revenue targets, and actual financial performance.
- **Detailed Q1 plan due end of November**

Who does what?

- Region/Chapters: The Education and Events department oversees the process and guides locations.
- All component levels (location, region, chapter, affinity group) must input their anticipated 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 mid-August. Detailed Plans should be completed by the end of November for Q1 of 2026 and subsequent quarters by the end of the previous quarter.

Responsibilities

- **HBA Locations & Regions:** Develop plans with oversight from the Regional Education & Events Presidents, 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 and/or Community Connections Events:** 6-12 per year
  - **Engagement 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 2027 plans.

- Identify gaps and areas for new topics or formats.

Step 4: Submit High-Level Plan

Due Date for 2027 Program Plan Submission: 14 August 2026

- Submissions should be made in the **2027 Global 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. The spreadsheet includes formulas to assist in estimating potential net revenue for your component.

Step 5: Submit Detailed Plans

Due Date: end of November 2026 for Q1 2027, 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, locations, etc.

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, scheduling needs, 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 14 August into the **2027 Global Master Events List.**
- Update the Global Planning Calendar with Q1 details by 30 November.
- Regularly update and refine event details.
- Ensure events are opened for registration *at least* 4 weeks in advance.
- Feel free to use this planning document to share plans cross-functionally with your component's leadership.

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