

# STEPS TO SUCCESSFUL PLANNING

Use this checklist of basic steps to plan a successful and well-organized event and prevent last minute crises, poor turnout, waste of resources, and member frustration.

- Assess Need
  1. *Member interest*
  2. *Target audience*
  3. *Current issues*
  
- Assess Resources
  1. *Finances*
  2. *Time*
  3. *People*
  
- Decide Program, Event or Activity
  1. *Refer to organization goals and assessment*
  2. *Brainstorm and test ideas*
  3. *Select idea and decide title*
  
- Select Date, Time and Location  
*Considerations:*
  1. *Date: speaker/performer and facility availability, calendar conflicts (finals, holidays)*
  2. *Time: audience preference and availability, length of program*
  3. *Facility: capacity, cost, AV, parking, type of seating, kitchen or other specific needs*
  
- Create and Monitor Detailed Budget
  
- Reserve Facility and Confirm Speaker/Performer  
*Obtain any permits and approvals needed*
  
- Identify Tasks  
*Speaker/performer/film; facility; publicity; ticket sales; fundraising; security; insurance; equipment; decorations; food; printed program; parking; hospitality; set-up; volunteer coordination; host role at event; clean-up; equipment return; thank yous; evaluation; etc.*
  
- Develop Timeline  
*Develop realistic timeline for each task and subcomponent using backward planning*
  
- Create Master Calendar with tasks, delegated assignments and deadlines
  
- Monitor Progress
  
- Identify Implementation Tasks and Schedule
  1. *Pre-event confirmations (speaker/performer, services, food, equipment, etc.)*
  2. *Create detailed schedule for day of event with task assignments*
  3. *Be prepared with contingency plan*
  
- Complete Post-Event Tasks  
*Clean-up, equipment return, thank you letters, review evaluations and member feedback, create detailed file with all documents and recommendations*

# PLANNING, IMPLEMENTATION AND FOLLOW-UP

## Creating a Timeline

- Develop a realistic timeline for the entire project using backward planning.
- Work backward from the date each major task needs to be completed and identify each step and internal deadline in the process.
- Build in extra time for unanticipated problems to avoid last minute crises.

*Example:*

Task: Publicity	Deadline
<b>Subtask: Flyer</b>	
Date of event	May 7
Distribute and email flyers to campus/community	April 18
Pick up flyers from printer and distribute to committee members	April 15
Send flyer to printer; post on Facebook, web	April 6
Final proof of flyer design and corrections	April 1
Review first draft of flyer	March 14
Send flyer content (text, logo/artwork, photos, sponsors, etc.) to designer	February 28
Confirm event title, time, sponsors, artwork, etc.	February 21

## Identifying and Delegating Tasks

- Review a checklist of all possible event factors (budget; funding sources; date, time, location; program content; presenters/performers; contracts; facility set-up; staging/program equipment; publicity; program materials needed; refreshments/food; security; permits; insurance; waivers; ticket sales; parking; evaluation; clean-up; post-event tasks; etc.) and identify all those that apply to your event.
- Assign or get members of your group to volunteer for each task and agree on deadlines.
- Create a master calendar of tasks, deadlines and person responsible. This is *essential* to keep track of all details and to monitor the progress of your event.
- Follow up weekly with team members on their assignments. If people fail to follow through on tasks, you must determine if adjustments are possible and reassess whether it is still feasible to conduct the event.
- Confirm everything two weeks in advance of your event (speaker/entertainment, facility, equipment, caterer, payments, set-up and clean-up crews, etc.).

## Implementation

- Complete every task under your control in advance so you are free to troubleshoot on the day of the event.
- Have a detailed schedule and assignments for the day of the event, including set-up, equipment check, meeting the speaker/entertainment, cash box, refreshments, evaluations, clean-up, etc.
- Arrive early to make sure set-up, equipment, sound system, refreshments, performer's CD/props and other logistics are in order. Arrange for someone to meet and escort your presenter or performer.
- Be prepared to facilitate and assist as needed. Be an active participant and don't leave early!
- Have a contingency plan. Do the best job possible to anticipate problems or last minute crises. Have a secondary plan to execute if necessary (rain site; alternate speaker or activity).
- Thank presenter(s)/performer(s) and audience members for attending.
- Oversee take-down and clean-up.

## Evaluation/Follow-up

- Collect a written evaluation from audience/participants if desired.
- Ask presenters for feedback and suggestions.
- Return equipment, pay bills, send copy of published reviews to speaker/performer, etc.
- Send thank you letters to all who helped organize and present the program, including your committee.
- Conduct a cost/benefit analysis by members right away, or you will forget what worked and what didn't.
- Keep a detailed record of the event on file for future reference.