EVENT PLANNING TOOLKIT
In order to make sure your event is successful, you need to plan accordingly. The following list provides an overview of the steps you can follow when developing an event. While the details of each step will vary depending on the event you are hosting, you can use this list as a starting point to ensure the success of your event.

1. Define the purpose of your event
2. Develop event goals
3. Organize a team
4. Find coalition partners or sponsors
5. Find a suitable place, time, and date
6. Brand and market your event
7. Plan the logistics and flow
8. Establish a budget
9. Follow up
10. Evaluate
EVENT PLANNING TOOLKIT

STEP 1: DEFINE THE PURPOSE OF YOUR EVENT

QUESTIONS TO CONSIDER:

• Why are you hosting an event?
• What type of event will best fulfill your intended purpose?
• What type of event is the most viable given the resources you have?
• What is your desired outcome?

EVENTS FULFILL DIFFERENT PURPOSES:

• To kick-off a longer, more sustainable campaign (EXAMPLE: A protest)
• To gain publicity for a particular cause or issue (EXAMPLE: A movie screening)
• To fundraise for a particular cause or issue (EXAMPLE: A 5k race)
• To recruit for an organization or program (EXAMPLE: A happy hour)
QUESTIONS TO CONSIDER:

- What does success look like? How will you measure it?
- What can you achieve with the resources you have?
- What benchmarks can you set for yourself?
- Who is your target audience?
USE S.M.A.R.T. GOALS

**Specific**
Goals should be written simply and clearly define what your are going to do.

**Measurable**
Goals should be measurable so that you have tangible evidence that you have accomplished the goal.

**Attainable**
Goals should be achievable; they should stretch you slightly so that you feel challenged, but defined well enough so that you can achieve them.

**Results**
Goals should measure outcomes, not activities.

**Timely**
Goals should be linked to a timeframe that creates a practical sense of urgency, or results in tension between the current reality and the vision of the goal.
STEP 3: ORGANIZE A TEAM

QUESTIONS TO CONSIDER:

- How many people do you need to ensure success of the event?
- How will you recruit volunteers?
- Do you need to train your volunteers?
- How will you delegate tasks?

PRO TIP

Once you gather volunteers, make sure to communicate the expectations of their participation clearly.
EVENT PLANNING TOOLKIT

STEP 4: FIND COALITION PARTNERS OR SPONSORS

QUESTIONS TO CONSIDER:

• Are there organizations or public figures that can help publicize your event with their networks?
• What organizations in your area have a similar mission?
• Are there coalitions that work on the issue area of your event?
• Are there businesses, clubs, or associations that can sponsor parts of your event in return for advertisement?
QUESTIONS TO CONSIDER:

- Are there local businesses that can donate a space?
- Are there local universities, community centers, churches, or temples that can provide a free space?
- Are there restrictions or regulations for the space you hope to occupy?
- Does the date fall on a federal or religious holiday?

PRO TIP

Make sure your location is ADA accessible so that all folks can participate.
QUESTIONS TO CONSIDER:

• How will you reach your intended audience?
• Who can help you market your event?
• What will make your event unique or exciting?
• How will your participants RSVP?

PRO TIP

Food, snacks, and giveaways are great incentives for participants.
5 WAYS TO MARKET YOUR EVENT SUCCESSFULLY

1. Create an event page to manage RSVPs. Your event page should include a compelling event description.

2. Engage coalition partners in marketing your event; they can help spread the word.

3. Reach out to local media outlets to cover your event.

4. Use email blasts to contact large groups directly. A catchy subject line can go a long way.

5. Use social media as much as possible, and have a consistent hashtag. Live tweet, share pictures, and broadcast live during the event as well.
SAMPLE SOCIAL MEDIA POSTS

More than 2/3 of the great barrier reef is gone. Educate yourself about climate change. Free movie screening next Saturday. #KeeptheReef

Interested in making change in your community? Join us next Saturday to learn about an awesome opportunity to do just that. Come for drinks & convo!

The attacks on reproductive health care keep coming. We need your help to continue to resist. Join us for a fundraiser banquet next Saturday.
EVENT PLANNING TOOLKIT

STEP 7: PLAN THE LOGISTICS & FLOW

QUESTIONS TO CONSIDER:

• How will you keep track of the steps needed to plan your event?
• How will you manage registration on site?
• Who on your team is in charge of what tasks?
• How will you distribute responsibilities?
STEP 7: PLAN THE LOGISTICS & FLOW

5 WAYS TO MAKE YOUR EVENT STAND OUT

1. Provide food, drinks, or giveaways
2. Invite a popular or famous guest speaker
3. Invest in high quality digital posters
4. Bring a popular band to play live music at your event
5. Enter participants into a contest to win a prize
SAMPLE WORK PLAN

One way to keep track of the steps you need to take is to create a master plan called a work plan. This plan can help organize all of the details and tasks that are needed to make your event successful, and it will help you delegate those tasks.

<table>
<thead>
<tr>
<th>Program Area</th>
<th>Task</th>
<th>Staff Lead</th>
<th>Staff Support</th>
<th>Due Date</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>Initial outreach to partners and sponsors</td>
<td>Staff 1</td>
<td>Staff 2</td>
<td>1/20/2018</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Book venue</td>
<td>Staff 2</td>
<td>Staff 3</td>
<td>1/16/2018</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Follow up with partners and sponsors (second touch)</td>
<td>Staff 1</td>
<td>Staff 2</td>
<td>1/16/2018</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Visit the venue</td>
<td>Staff 2</td>
<td>Staff 3</td>
<td>1/18/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Make order for food and drinks</td>
<td>Staff 1</td>
<td>Staff 3</td>
<td>1/20/2018</td>
<td>Incomplete</td>
<td>Two peanut allergies</td>
</tr>
<tr>
<td>Communications</td>
<td>Send out Save the Date</td>
<td>Staff 3</td>
<td>Staff 1</td>
<td>1/23/2018</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Create agenda</td>
<td>Staff 4</td>
<td>Staff 1</td>
<td>1/25/2018</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Outreach to press</td>
<td>Staff 1</td>
<td>Staff 2</td>
<td>1/25/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Send out event registration information</td>
<td>Staff 3</td>
<td>Staff 1</td>
<td>1/25/2018</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Meet with volunteers</td>
<td>Staff 1</td>
<td>All Staff</td>
<td>1/26/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Confirm materials and set up</td>
<td>Staff 4</td>
<td>Staff 3</td>
<td>2/3/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Post about event on social media</td>
<td>Staff 1</td>
<td>Staff 3</td>
<td>2/8/2018</td>
<td>Incomplete</td>
<td>Post on Twitter, Facebook, and Instagram</td>
</tr>
<tr>
<td>Communications</td>
<td>Post about event on social media</td>
<td>Staff 1</td>
<td>Staff 3</td>
<td>2/12/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Do dry run of introductions/welcomes/speeches</td>
<td>Staff 1</td>
<td>All Staff</td>
<td>2/14/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Confirm food and drink arrival time</td>
<td>Staff 1</td>
<td>Staff 3</td>
<td>2/14/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Send out day-of reminder to participants</td>
<td>Staff 3</td>
<td>Staff 1</td>
<td>2/16/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Send follow up emails to participants</td>
<td>Staff 1</td>
<td>Staff 2</td>
<td>2/17/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Send thank you notes to speakers and venue staff</td>
<td>Staff 1</td>
<td>Staff 2</td>
<td>2/17/2018</td>
<td>Incomplete</td>
<td></td>
</tr>
</tbody>
</table>
An **action plan** will help you determine what roles and responsibilities each member of your team will have during your event. This action plan should be broken down into the different times of day and should include what tasks are to be completed by which member of the team.

### SAMPLE ACTION PLAN

#### Time | Action | Location | Owner | Support | Support
--- | --- | --- | --- | --- | ---
8 am – 9 am | Staff meets for breakfast and briefly reviews the day. | Meeting Room 1 | All Staff | All Staff | All Staff
9 am – 12 pm | Set-up event space in venue: Display Signage: Welcome Sign | Main Room | All Staff | All Staff | All Staff
| | Gender neutral bathroom signs | | | | |
| | Set-up Registration Table | | | | |
| | Black table cloth | | | | |
| | Sign-in sheet | | | | |
| | Swag | | | | |
| | Visitor and conduct forms | | | | |
| | Name tags | | | | |
| | Projector | | | | |
| | Camera | | | | |
| | Speaker with Music | | | | |

**DOWNLOAD THIS TEMPLATE TO CREATE YOUR OWN**
SAMPLE CHECKLIST

- Pick venue, time, and date
- Recruit volunteers
- Create agenda
- Outreach and follow up with sponsors and partners
- Send out save the date and invitations
- Promote the event on social media
- Buy materials
- Order food and drinks
- Outreach to press
- Do a dry run of the event
QUESTIONS TO CONSIDER:

• What are all of your expected costs?
• How much do you need to fundraise?
• How will you allocate your funds?
• Do you need to cover fees, accommodation, or travel for speakers?
EVENT PLANNING TOOLKIT
STEP 9: FOLLOW UP

QUESTIONS TO CONSIDER:

• How will you engage participants in your issue or topic moving forward?
• What are the immediate next steps that participants should take?
• What are the long term goals of your event?
• How will you keep a record of all participants?

PRO TIP
A simple email, thank you letter, or tweet goes a long way.
Dear Participant,

Thank you for attending the Immigration Policy movie screening. We hope that you will become involved in the ongoing campaign to fight for comprehensive immigration reform. The next campaign meeting will be held on Friday, July 16th at 5 PM in the campus library. We hope to see you there.

Dear Speaker,

Thank you for taking the time to speak at the Social Justice Conference. Your words on self-care in the progressive movement were truly inspirational for our participants. We look forward to a continued partnership and hope that we can connect again soon.

Dear Venue Staff,

Thank you for all of your help and support during the 2017 banquet at your venue. We appreciate your support in making sure that the event was a success. We look forward to working with you again.
QUESTIONS TO CONSIDER:

- Did you meet the goals of your event?
- What went well?
- What aspects of your event can be improved for next time?
- How will you gather feedback from participants?
STEP 10: EVALUATE

SAMPLE EVALUATION LANGUAGE

• Using a scale from 1-10, 1 being “unsatisfactory” and 5 being “excellent,” how would you rate the following aspects of the event?
  o Overall organization of the event
  o Material covered in the event session
  o Speakers and trainers
  o Food and beverage

• What was your favorite part of the event and why?

• What was your least favorite part of the event and why?

• Which speaker/trainer did you find most engaging?

• After learning about our organization, do you plan on becoming a member?
BONUS STEP: LIVING INTO PROGRESSIVE VALUES

1. Use locally sourced goods
2. Host the event at a local, women, or POC-owned business
3. Make sure space is accessible to disabled folks
4. Make sure the bathrooms are accessible to gender nonconforming folks; consider bringing your own bathroom signs to the venue
5. Be cognizant of dietary restrictions
6. Have a recycling bin on site, and encourage participants to reuse plastic products
7. Use gender inclusive language to address the group
8. Consider different ability levels when holding activities
For more free resources to support your activism and organizing efforts, please visit:

YOUNGPEOPLEFOR.ORG/RESOURCES