Producing and managing an event isn’t rocket science. Almost anyone can throw a party. But there’s a difference between someone who invites their friends at the last minute and someone who spends a couple of weeks planning and preparing everything for the big day. Below are a few steps to help guide your event planning process, including the following: Pre-Event Decision Making; Team Roles and Responsibilities; Event Fundamentals; Implementation Practices.

**PRE-EVENT DECISION MAKING**

Before organizing an event, key decisions should be considered. These decisions/considerations are usually made by an individual or a small group. Though it isn’t necessary to make decisions on all of the items below prior to official event planning, knowing the answers to some of these is helpful, especially because they will have a direct impact on how your event is organized.

**Event Objective**- What is the goal of the event? Is it to raise funds, bring in new friends, help brand/demark the organization or something else? Events often have multiple goals, but these can vary. It is important to put some advanced thought into the main purpose of the event so that the entire organization or event team is on the same page. This helps greatly in planning the event, but also in talking to friends, supporters or members of the public about your event.

**Event Size**- What will the size of the event be? Based on the event objective, the organization will need to determine the appropriate size for the event. If the event objective is to raise money, for example, a larger event with ticket sales will be important. If the objective is to bring in new friends to the organization and not
necessarily to raise money, a smaller, free event might suffice. Size will help determine overall needs, costs, etc.

**Target Audience**- Who is the target audience for the event? Target audience is determined in part by event objectives. Is the target major donors, community supporters, the organization’s constituent base, all of these or something else? The target audience should dictate the way the event is managed, including event ‘feel,’ event program, cost, etc.

**Selecting Your Team**- Who’s in charge? Is there an Event/Committee Chair? How many people will you need on your team or Committee to get the job done? Are these current staff members, volunteers, contracted individuals or a combination of all of these? Are additional funds required to bring on additional team members/contractors? Some organizations hire outside consultants and assistants depending on various factors including staff size, organizational capacity, budget, etc.

**Budget and Cost**- Is there an event budget? What is it? What is the anticipated event cost? Sometimes, an organization has funds on hands to invest in an event. Other times, the event budget is developed in advanced of the event without secured funds. In this case, funds need to be generated through sponsorships, tickets sales, etc. Regardless, an event budget will need to be created which includes projected expenses and anticipated revenue. With events that run repeatedly over time, budgets remain more or less the same, especially if the overall format of the event is the same year after year. Sponsorships are one area that can change your income quickly, especially if sponsorships have not been a focus area for the organization and it’s events.

**Location** (based on above)- What is the best location to host this event? Consider seasons (indoors/outdoors) and your audience when determining event location. An outdoor event in the summer will have a very different look and feel than an indoor event in the winter.

**Resources Available**- Who and what does the organization have within its existing resource base that can help meet event objectives and save costs. Does an organization’s supporter own a nice home at which to host a house party? Can you use the community room at the church for free?

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TEAM ROLES AND RESPONSIBILITIES

Knowing who is in charge of specific event elements is important to a successful event, as is developing a team communication plan and setting firm timelines. Picking the right team members and empowering them to make decisions/have ownership over the event is equally important.

Identification of Roles- Perhaps the most important component of organizing an event is to identity who is the Committee Chair, who makes up the event team/Committee and then assigning specific roles to each team member. It is important to allocate roles and responsibilities based on a team member’s interest/passion/expertise in order to get the best results from that individual. In some cases, individual team members will play multiple roles while in other cases one or more team members may be grouped together to a perform one role (or accomplish one task). Oftentimes, there will be a Committee Chair/Coordinator or point person surrounded with a competent support team. In some cases there will be a ‘core team’ that meets regularly surrounded by a secondary support team of volunteers that meets less regularly.

When identifying roles, event organizers/ coordinators need to put their faith and trust in the person being handed this new responsibility. Delegation of tasks is essential! Until a volunteer or team member shows that they cannot do the job or do not have the capacity to do the job, they should be empowered to try. Consistent ‘check-in’s (see Team Communications below) will allow event coordinators to determine if the job at hand is getting accomplished.

Tools: Clear identification of roles; Event Coordinator/point person

Setting Timelines/Deadlines- Setting key target dates for things like media, sponsorships, etc. is important in order to keep things on track and to help team members on task. Online calendars can be effective for this purpose. It is often best to set timelines by working backwards from the event date.
Tools: Shared calendars; Agreed upon event date

**Team Communications** - With event details and logistical needs identified, team roles assigned, and an event timeline in place, a communication plan for the team is critical. In-person meetings by the team/committee are a common approach and are effective in sharing updates from each member with the rest of the group. These can occur on a weekly basis, or perhaps less frequently in the early stages of planning. It is at these team meetings where accomplishments, barriers, and other updates are shared with the rest of the group. Problems can be shared and solved in this setting, as can any new information that has been gleaned. Also, check-in’s with volunteers at meetings is important to assess whether they are effectively completing their tasks.

Online ‘trackers’ are a great way of keeping team members informed of event updates on a day-by-day basis in between meetings. Trackers might be useful for things like sponsorships, vendors/exhibitors, budgets, and any other critical information that could be helpful to the entire team in real time. Trackers allow committee members to be informed of progress in areas outside of their specific responsibilities.

*Tools: In-person team meetings; phone calls; trackers*
EVENT FUNDAMENTALS

Events come in all shapes and sizes. Despite this, there are certain core elements that are characteristic of most events. Below are some event fundamentals and tools to encourage best practices.

**Event Committee**- Regardless of size, most events are managed by committee. This Committee is generally chaired/led by one person. The Committee Chair is responsible for organizing meetings, developing meeting agendas, setting timelines and goals with the Committee and checking in with Committee members on a regular basis. A committee can be made up of staff, volunteers, donors, community representatives or any combination of these. Members of the Committee are generally assigned a specific task (or series of tasks) and will report their progress back to the Committee.

It is important to note that the Committee Chair is NOT necessarily the Event Coordinator (the person who is in charge of ensuring a smooth event on the actual day of the event). Sometimes they are the same person, but not always.

*Tools: Event Coordinator; weekly meetings; trackers*

**Sponsorships (cash/in-kind)**- Sponsorships, both cash and in-kind, are important for many events, especially for larger gatherings. Having a well-crafted sponsorship plan is critical to an event’s success and in bringing in extra revenue. Being able to offer opportunities for cash sponsorship *and* in-kind sponsorship is important. Sponsors can include local businesses, banks, foundations, individual donors, media outlets, grocery stores and more.

Cash sponsorships are just that – cash for your event. In-kind sponsorships are donations of non-cash items that hold value such as product donations, food, alcohol, media/press and even volunteer hours. Because cash and in-kind products are NOT the same, in-kind donations are generally valued at half the value of a cash donation. Both cash and in-kind sponsorships should be rewarded with certain ‘sponsor benefits’ that would be outlined in an sponsorship packet or ‘deck.’
Remember that even for smaller events/gatherings, sponsorships are an easy way to bring in additional revenue. Local businesses, banks, etc. will often support small gatherings in exchange for some basic publicity or marketing of their business by the organization receiving support. This can be done in the form of banners, public announcements at the event, public ‘shout outs’ on social media and more.

**Tools:** Sponsorship packet (deck); sponsor target list; opportunities for different levels of sponsorships, including in-kind sponsorship; sponsorship timeline; sponsorship tracker

**Marketing/Media**- Marketing your event using traditional and social media outlets is critical. Depending on your target audience and demographics, certain forms of media may work better than others. Generally speaking, traditional print media that must be paid for has become less attractive with the rise of social media and free access to social media resources. However, many media outlets will often offer free media support in exchange for event sponsorship (In-kind media support). Knowing your target audience is essential when crafting your media outreach strategy. Event posters, flyers, etc. can all be part of your marketing strategy.

**Tools:** Updated media list; press release; event flyer/poster; social media campaign (facebook/twitter/instagram); in-kind sponsorship deck

**Permits (if necessary)**- For certain types of events, permits will be necessary from city/county/state agencies. These might include alcohol permits, street closure permits, parking permits, public space permits, health permits, etc. You should know permit requirements and costs as soon as possible in order to incorporate these into your plans.

**Timelines/ Schedules**- Plotting out an event timeline, often picking an event date and working backwards, is an important part of event planning. A good timeline with associated milestones helps ensure progress in a timely manner.

**Tools:** Shared calendar

**Community Engagement and Outreach**- Figuring out how and when to engage your community of supporters in event planning is important. These supporters could become great event ‘ambassadors,’ volunteers, etc.

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Event Implementation/Management

With event details in place, the last thing left to do is host the event. The key to a well managed event is knowing who the point people are and what responsibilities they hold. Being able to communicate quickly in a fast paced event environment is also important in order to diffuse any conflicts that might arise. The following are some tips and tools to assist with event implementation.

Lead Event Organizer/Coordinator- Every event, no matter how big or small, should have a lead point person at the actual event. This person may or may not be in charge of all event details (he or she might assign certain responsibilities to others), but will be looked to for high-level decision making by others. It is important to note that the event point person/coordinator is NOT necessarily the Committee Chair (as mentioned in Event Fundamentals).

Production Schedule- A handy tool to have at any event is a Production Schedule. Production schedules are ‘timelines’ for events that include everything from event load-in, event set-up, and event break-down. Oftentimes, Production Schedules are broken down by hours starting at the beginning of the day (6am- tables arrive on-site; 7am- linens arrive and first volunteers arrive, etc.) and running through the entire event, finishing at the time that the last person leaves. They also often indicate the people in charge of dealing with a specific task (ie. 10am- Clara arrives with volunteer food, etc.).

Production Packet- A production packet for key staff will include a clipboard, pen, a production schedule, phone numbers for key staff, copies of important permits, a map or layout of the event site, media talking points, etc.

Volunteers and Volunteer Manager- Depending on the size of the event, a volunteer manager may be needed. Volunteer managers should be the main point of contact between event hosts and the community at large, and can often be a member of staff or a hired volunteer/intern. For large events, volunteer recruitment should begin well in advanced of the event date. Online tools exist to encourage volunteers to sign up.
Media/Messaging- Talking points for all staff are important to ensure a consistent message at a given event. Talking points should be developed well in advanced of the event and shared with all key staff/team members. Talking points should answer basic questions such as: What do you intend to accomplish with this event? How does this event support your organization? What are your organization’s program areas? Etc. If a specific point person has not been identified for dealing with media (depending on size of event), talking points are that much more critical. Oftentimes, organizations will dedicate one person to deal with all media inquiries.

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