

Special Events Planning

Checklist for the event, tasks, and assignments



Special Events Planning

Special events for nonprofits often are a way to gain positive community exposure for the organization, while raising funds. However, if the event is not thought out or planned correctly, it can quickly become overwhelming. Even more so, a poorly planned event can end up costing the organization resources –money and volunteers! Below are some questions to ask before venturing into a new special event. Also included is a checklist of tasks and assignments to make sure all action items are thought out, assigned, and completed.

Prior to embarking on an event, ask yourself these questions:

	Yes	No
Do you need the money?	<input type="checkbox"/>	<input type="checkbox"/>
If so, do you have a reasonable expectation of amount needed to be raised?	<input type="checkbox"/>	<input type="checkbox"/>
It costs money to raise money. Are you willing and able to make the necessary expenditures?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a case for support, appealing to both head and heart?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have the staff expertise to execute the event?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have active and highly motivated volunteers to help execute the event?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have good access to funding sources (sponsors, ticket patrons, corporate teams)?	<input type="checkbox"/>	<input type="checkbox"/>
Is there competition for special events (another gala, golf tournament, run, walk)?	<input type="checkbox"/>	<input type="checkbox"/>
Is this special event in line with the mission and funding priorities of the organization?	<input type="checkbox"/>	<input type="checkbox"/>
Have you had success in previous special events, and have they been cost effective?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a positive image in the community?	<input type="checkbox"/>	<input type="checkbox"/>
Is your organization well known in the community?	<input type="checkbox"/>	<input type="checkbox"/>

Special Events Tasks and Assignments Checklist

Conducting a top-notch special event doesn't just happen. It takes lots of planning, coordination, and attention to details. It takes committed staff and volunteers each completing tasks, meeting deadlines, and staying on budget. Below is a sample list of tasks to think about when planning a special event. Identify who is responsible to complete those assignments, the deadline to be completed, and what was budgeted for facilities, marketing, prizes, etc. One way to identify deadlines is to decide on the special event date and work backwards to when items need to be completed.

Name of Event:

Chairperson:

Date(s):

Location/Facility:

Activity	Date to be Completed	Person Responsible	Budgeted Amount	Notes/Completed
Create Timeline and Budget				
Identify sponsors, sponsor requirements				
Prepare master staff/volunteer assignment list				
Recruit Committee:				
Define job descriptions (and organizational chart, if the volunteer structure is complex)				
Recruit chair				
Identify key volunteers				
Identify staff liaisons				
Location & Equipment:				
Plan facility selection, sign contract, gather hotel or other menus, floor plans, AV pricing				
Tables/chairs needs				

Electrical/Microphone/other AV, extension cords, determine own equipment, facility's equipment				
Stage/podium				
Heating/cooling				
Finalize AV list, room set-ups, final meal guarantees				
Housekeeping:				
Floors/Bathrooms				
Trash cans				
Invitations:				
Guest List				
Printing				
Mailing				
RSVP Cards/Reservations				
Publicity:				
Flyers/Posters				
Mailings				
Radio/TV/Newspapers				
Tickets:				
Printing				
Distribution				
Sales				
Logistics:				
Host/Hostess				
Parking				
Security				
Insurance/Permits				
Food Service:				
Menu approved				
Wait staff				

Special diet needs checked				
Entertainment:				
Initial contact				
Contract signed				
Programs/Decorations:				
Program compiled				
Program printed				
Write script for key personnel, obtain approval, edits, make copies				
Decorations planned				
Prepare equipment list, equipment transportation decisions				
Decorations in place				
VIP needs				
Identify VIPs and who will greet, sit with, transport, introduce, etc.				
Additional Responsibilities:				
Set up signs directing to event				
Assign parking volunteers				
Send out volunteer job assignments, times, and have a volunteer check-in at event				

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