

# How to Plan an Event /Activity

Event and activity planning is one of the most important aspects of your leadership role. It is well-planned events and activities that interest and motivate members to stay involved and encourage non-members to become involved and join.

## Bottom Line:

As a Leader, the members and adults are counting on you to provide well-planned and quality events and activities while you are in-charge. You will be judged by your performance. As the old saying goes, “The buck stops here.”

## Planning:

Creating a plan has the obvious advantage of forcing you to think ahead about the task (event/activity) and the ways to accomplish it (the plan). The end goal is that the task is done successfully. Involving the members in the planning and execution of the task has the added bonus of giving every member a chance to influence the decisions and gain satisfaction from having helped decide on and carry out the event/activity.

## Process:

### 1 Consider the Event or Activity:

What is the assigned event/activity? Does everyone understand the task? Get agreement from everyone on the assignment.

Start the planning process by asking the famous questions:  
Who?, What?, When?, Where?, Why?, How?, and Cost?

Ask for input and opinions. Decide whether the group will accept the assignment as is, bargain for changes to the assignment, or refuse the assignment. Lead the group to a point where it shall **REACH A DECISION**. You cannot go any further in the planning until you reach these basic decisions.

### 2 Do Research and Consider the Resources:

You and the members of your group should familiarize yourselves with the history of the event/activity if it is one that has been done before. Contact others who have attended or planned the event/activity before. Ask questions about the positives and/or negatives and then take advantage of their insight.

Consider your resources for the event/activity. Is there potential for your group to put on such an event/activity (this includes not only the number of members, but the age appropriateness of the event/activity for the membership, and experience in putting on said tasks); past experience with such an event/activity; equipment and supplies; money; time availability; potential locations, adult and parent availability.

During the review of each item, **REACH A DECISION** on how to proceed in planning.

### **3 Consider Alternatives:**

Be flexible in your planning process. Expect the unexpected. Consider all the possible things that could go wrong (such as rain for an outdoor event, failure of DJ to show up for the dance, lack of support from the adults/parents). Have a “Plan B”. Think of alternatives to obstacles in planning the event/activity. Be ready to use them. Consider all possibilities and write them into your plan.

Lead the group to **REACH A DECISION**.

### **4 Set Goals and Create the Written Plan**

Once the group has considered, researched and evaluated the task, outlined resources, and planned alternatives (including “Plan B”), it is now time to decide how the group would like to have the event/activity occur. Set goals (attendance, publicity, profit, organization, and outcome). Consider how you might add or vary from the plan on a whim. Be flexible – expect the unexpected and adjust to meet the needs. Review carefully with the group before the group makes any changes.

Make sure that all involved **REACH A DECISION** and agree on the goals and plan.

## **Remember the Six P's**

**Prior Proper Preparation  
Prevents Poor Performance**

**Do you understand?  
Reach a Decision and push the GO Forward  
Button!**

# Planning Guide

## Basic Information Sheet

**Who – TARGET AUDIENCE:** \_\_\_\_\_  
*Who do you want this event to be for? What is the age of your audience? Does the event fit the expectation?*

**What – EVENT:** \_\_\_\_\_  
*Does it sound cool? Original idea? Is it a fancy name for an old event?*

**When – DATE & TIME:** \_\_\_\_\_  
*Check the calendar for competing events? Is the location available on said date and time? Does the date and time match the type of event? Are all of the essential personnel available on this date?*

**Where – LOCATION:** \_\_\_\_\_  
*Is your date and time available? Does the location benefit your event? Does it meet all of your needs for this event? Is the cost a factor? Don't forget about a Plan B...*

**Why – PURPOSE AND GOALS:** \_\_\_\_\_  
*Ask why are you doing this event? Does it have a purpose? Have you set goals? What is your expected outcome? Can this event meet those expectations? Have you worked through all of your options?*

**How – THE PLAN:** \_\_\_\_\_  
*This is where the rubber meets the road! The plan must be written. Have you listed each of the required tasks? Do you have a timeline and deadline for each task? Have you covered a Plan B for each major task? Does your plan lead to accomplishing your purpose and goals? Do you have each task assigned to a person who has committed to completing the task? Does your plan include the "day of" agenda? Have you included the follow up and evaluation of the event?*

**Cost – BUDGET:** \_\_\_\_\_  
*This must be a written budget. Expenses: Have you include all of your possible costs? How about if you need to trigger a Plan B? Now add all of your expenses together and divide by your expected number of attendance – that gives you a cost per person. Does the amount you are going to charge cover the cost per person plus profit? Income: Are there other avenues for an income stream?*





# Budget Worksheet

## Income Less Expenses: \_\_\_\_\_

*Subtract the expenses from the income. If the expenses exceed the income, place parentheses around the difference. { i.e. (\$221.00) }*

## Financial Goals of the Event: Is the Event meant to:

\_\_\_\_\_ Make a Profit    \_\_\_\_\_ Break Even    \_\_\_\_\_ Lose Money

If the goal is to make a profit, what is the desired profit? \_\_\_\_\_

If the Event will Lose Money, how much has been allotted to cover the loss? \_\_\_\_\_

## Does the Income less Expenses match the Financial Goals? \_\_\_\_\_

*If not, adjust the budget until the Income less Expenses matches the financial goals of this Event.*

## Determining the Break-Even Number:

To determine your break-even number for an Event, divide the total expenses by the registration fee/ticket price (*i.e. total expenses equal \$3000.00 and the registration fee is \$20.00; the break-even number is 150 registrants*).

**Total Expenses:** \_\_\_\_\_

**divided by Fee/Price:** \_\_\_\_\_

**equals Break-Even Number:** \_\_\_\_\_

## Establish the Ticket Price:

To determine your ticket price and to meet your Financial Goals, divide your total expenses by the number of people you expect to attend the Event (*i.e. total expenses equal \$3000.00, you have a goal of a \$500.00 profit, you expect 200 registrants; you need to charge \$17.50 per person registration fee*).

**Total Expenses:** \_\_\_\_\_

**plus Financial Goal:** \_\_\_\_\_

**divided by Expected Registrants:** \_\_\_\_\_

**Amount for Tickets:** \_\_\_\_\_

# Follow Through

All of the training and preparation that could possibly take place will never overcome a leader who does not have the will to follow through and take action on a plan.

You have to be committed to this Event from start to finish, never letting its success be overshadowed by other temptations and aversions.

Here are some tips to help you in completing a project.

**1. Take Action every day**

*Don't let a day slip by without doing something, even a small task, which will take you one step closer to completion.*

**2. Delegate Well**

*Make sure there are enough people helping out so that you do not become overburdened.*

**3. Evaluate your Progress Often**

*Periodically ask yourself, "How am I performing as the leader of this Event?" Ask others to evaluate your progress as well.*

**4. Consider the consequences on non-action.**

*If you are ever about to procrastinate or put off taking action ask yourself "will I get greater pleasure by putting off this action or will I get greater rewards by accomplishing the goals of this Event?" How do I want to be considered as a "Procrastinator" or as a "Winner!"?*

# Report

Your final task as the leader of an Event is to prepare an Event Report detailing the outcome and observations of the event. This serves several purposes. First, you are able to evaluate your performance and the overall effectiveness of the Event. Also, others who will follow you will be able to learn from your mistakes and successes.

Your Event Report should include, at minimum, the following:

- 1. Cover Sheet**  
*Listing the name of the event, the date, time and place, the name of the Event Leader, and the date of the report.*
- 2. Planning Overview**  
*A description of the planning process outlining the steps that were taken to make the event happen. This would include many items on your Task and Timeline, plus all meetings and contacts that led up to the Event.*
- 3. Event Evaluation**  
*An honest observation of the outcome of the Event.*
- 4. Recommendations and Suggestions**  
*Suggestions that you believe would be helpful to the next person who may lead the Event.*
- 5. Financial Record**  
*A statement of the actual income and expenses.*
- 6. Acknowledgements & Attachments**  
*List all the people who contributed to this Event. Plus include any contacts, receipts, certificates of insurance, etc. that were a result of the Event.*

## ACKNOWLEDGEMENTS

List all the individuals and/or groups that provided any assistance in the completion of this Event. Check off when you have mailed a Thank You card or letter to that individual or group.

_____	_____
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