

11 Simple Steps to a Spectacular Event

If you want to plan run an event, planning is key to success. This simple guide is designed to help you to think about all of the different aspects of event planning so that you can run a successful event on time, within budget and achieve your aims.

1. Organise a Team

Organising an event is not a one-person job. Whether paid staff or volunteers or a mixture, it will be extremely useful to gather together an Event Committee.

This will support ideas generation; pinpointing the right idea for the event; knowledge of subject matter and possible speakers/performers etc. It will also help distribute the work and ensure deadlines are met.

Your team will need to think about some of the following:

- Suitable date(s);
- venue booking and management;
- speakers;
- entertainment;
- publicity;
- sponsors and/or funding;
- volunteer management;
- how the day will run;
- payments
- etc.

2. Develop Event Goal and Objectives

Do you know why you are running the event? Because you want to or because you have a particular skills set may not be enough.

Think about why you want to run the event – perhaps it is a yearly event that celebrates an area or an estate or perhaps you are running a conference to further the aims of your organisation. No matter what type of event it is you will need to establish tangible a goal and objectives.

Why are you organising this event?

What do you hope to achieve?

Does it fit with your organisational aims and objectives?

3. Risk Assessment

Make sure you do a risk assessment for the event and work out how to mitigate each. Particular risks include the use of fireworks, bouncy castles, sports or other physical activities, large crowds, children running about, the availability of alcohol at the event or safety hazards at the venue (including outdoor events).

Do you need insurance and/or licenses?
Does your current insurance cover everything?
When you pick a venue and entertainment do they have the right insurance?
How many volunteers will you need?
Will you need to DBS check your volunteers?

Below is some further information on different types of insurance and licenses:

Public Liability Insurance

If you are running any public events, you are likely to need public liability insurance.

Public Liability Cover against claims by third parties - this is insurance that protects the organisation against claims involving illness, injury or death, or damage to property caused by the neglect of the organisation or someone working for it. This will be something that you need to account for in funding bids for events.

See guidance:

- <https://www.gov.uk/guidance/how-to-insure-your-charity>
- <https://insurance.aon.co.uk/business/insurance/not-for-profit/charity-insurance>
- [Money saving Expert ' Getting Insurance when Bankrupt'](#)
- <http://www.zurich.co.uk/en/charity-insurance/our-products/public-liability>
- <https://www.endsleigh.co.uk/business/charities/public-liability-for-charities/>
- https://www.unityinsuranceservices.co.uk/event_fund_raising.html

Volunteers and Insurance

When purchasing insurance to cover volunteers it is important to bear in mind that volunteers are in a unique position in your organisation. They are not employees and may not be automatically considered as a 'third party' for the purposes of Public Liability Insurance. Therefore, it is important that your insurers specifically refer to volunteers in insurance policies e.g. Employers Liability Insurance should cover employees and volunteers.

Insurance policies should cover all actions carried out by volunteers and should list all the venues in which these actions are carried out e.g. befrienders in people homes, trips to the swimming pool with a youth group etc. You may wish to consider holding an annual review with your insurance company to discuss activities that are planned for the coming year and to check whether existing policy cover is adequate.

If volunteers regularly take part in strenuous or potentially dangerous activities e.g. coaching sports or using specialised equipment, then be sure that these activities are covered in your policy.

If your organisation is arranging a one-off event e.g. a festival or a unique fundraising event, you can arrange one-off insurance cover specifically for this event. This cover should include employers as well as public liability.

For more information see:

- <https://knowhownonprofit.org/people/volunteers-and-your-organisation/insurance-and-volunteers>

Personal Accident Insurance

Provides payment in the event of injury or death regardless of whether or not the organisation is liable. This type of insurance can be extended to cover volunteers.

It is a voluntary benefit that your organisation might wish to offer rather than an essential insurance cover.

It is possible to select specific volunteer roles or certain volunteers to be covered by this type of insurance rather than insuring all volunteers.

Volunteer Drivers and Insurance

It is important that volunteers and organisations are aware of their responsibilities regarding insurance for volunteers who drive as part of their volunteer role. If the organisation owns the vehicles that volunteers use in the course of their volunteering, then it is the organisation's responsibility to arrange insurance cover and see evidence of the driver's credentials. If the volunteer uses his/her own vehicle then they must arrange insurance cover.

If volunteers are required to use their own cars during their volunteering the organisations should inform the volunteer that it is essential for them to let their insurance company know that they will be using their car during volunteering. This should be done in writing and the insurance company should send written clearance to the volunteer. In general, this should not involve an increase in premiums.

Organisations should assist their volunteers by providing them with a letter, which they can forward to their insurance company. The letter should: - Explain that they are a volunteer with your organisation - State if they are using their car to carry passengers while volunteering. - Ask for written confirmation that their insurance policy covers any passenger or third-party claim, which might arise out of the use of the vehicle for this purpose. NB. Some organisations also provide contingent motor liability insurance which protects the organisation if there is a problem with the volunteer's insurance

As with any insurance, it is best to shop around and talk to different insurers about what they offer and what they will cover etc. See our fact sheet '[What you need to know about insurance as a VCO](#)'

Holding events outdoors

If you want to hold an outdoor event it is worth looking on the local councils' website to find out more about use of public space and event licenses. For example, you may need a [Temporary Event Notice](#) and which needs to be approved by the police and the council.

You can find more information on Southwark Council's website: <http://www.southwark.gov.uk/events-culture-and-heritage/planning-an-event/planning-a-community-event>

4. Set a Date

The date might already be pre-set for a reoccurring event, but if this is a new event, be sure to consider the following before firming up your date:

- Give yourself enough time! Ideally, you should have 4-6 months to plan (depending on the nature of your event)
- Be aware of statutory and religious holidays – will these effect turnout (positively or negatively)?

- Depending on the event, do you need to avoid school holiday time periods (e.g., winter, spring and summer holidays)
- Check dates with key participants – e.g., speakers, presenters, VIP guests, etc.
- Check if there are any relevant days or weeks related to your event for example Volunteers Week; Trustees Week; Small Charities Week; International Women’s Day; Black History Month; Mental Health Awareness Day etc. It may be useful to link your event to a national event.

5. Create a Master Plan

The team you pull together should then start to create a master plan – what needs doing and by when? It should encompass every aspect of the event, including:

- Venue, logistics & catering management (contracts, permits, insurance, etc.)
- Speakers/presenters (identifying, confirming, logistics & management)
- Activities/entertainment
- Publicity/promotion (online & off-line, e.g., web page & online promotion; events calendars; printed programs; media relations; signage; social media, etc.)
- Registration (online sign-up, payment and tracking; on-site sign-in, etc.)
- Sponsor/partner/funder management
- Volunteer management
- On the day logistics
- Etc.

Decide who in the group will take the lead on each item and give them a priority order.

6. Administrative Processes

Once you have established everything you need to do and by when, how are you going to keep track of everything?

It is a good idea to create a simple way of tracking everything. Perhaps an Excel spreadsheet with a timeline, indicate when each item should be completed by and who should be leading on it; another tab can be the overall budget; another tab for all key contacts (name; email; phone number); and so on, ensuring you can track every aspect.

[Eventbrite](#) is a useful and free tool you can use to keep track of registration.

You can find a longer list of useful tools at the end of this fact sheet.

7. Establish a Budget

Your budget should incorporate estimates for all the key items identified on your Master Plan.

Don’t forget to include any travel or accommodation costs for speakers/presenters unless this is already included in their charges. If speakers provide their services for free, budgeting for a thank you gift such as a box of chocolates and/or flowers is a nice touch.

If you don’t already know how much things cost try an online search to get an estimate of costs, phone around a few caterers and so on so that these can all be added to your budget with a level of accuracy.

8. Identify Ways to Cover Your Costs

Events can be expensive: it may be that you intend to cover the cost by charging for tickets, however, often this would put the tickets at too high a price. Therefore, even when charging an entry fee or ticket, you are going to need to know how all the costs involved will be covered. This can be done in several ways:

- Charge for tickets/entry
- Invest some money from previous fundraising events into it i.e. you may have done some raffles or sponsored events throughout the year that go towards your one big event.
- Seeking corporate sponsors to fund a portion of the event. This can range from national organisations that might want to sponsor a dinner, offer a door prize or a key silent auction item, to local businesses that might be able to provide goods or services, such as flowers for the tables, gift bag items, etc.
- Partnering with other community organisations who might be able to offer a venue and/or assistance with organising or staffing an event
- Apply for appropriate grant funding: remember you will need to plan this in very early, as funders will have deadlines.
- Run a Crowdfunding campaign for the event: you will need to show your planning and perhaps offer something to anyone giving over say £100 towards the event

9. Brand Your Event

It will be important to have a timely and compelling theme that helps your event stand out from the rest. There are a lot of events and activities going on all trying to grab people's attention so why should they come to yours instead?

Think about some branding you have seen and remember: Save the Children's [Christmas Jumper campaign](#); [Movember](#); Community Southwark's [Trustee Speed Matching](#) and so on.

You may want the theme to fit in with your organisations branding or you may want it to look very different. You will also need to think about a name since it can be a key attention-getter, especially in online media

- **Brainstorm names:** When you are brainstorming the event name, think about:
 - how is your event different from other events in your sector?
 - what are you hoping to convey through this event?
- **Create a Tagline:** Once you've come up with a name, also try to craft a tagline – a short, memorable branding slogan that describes the event.
- **Create a hashtag:** useful for social media both for advertising and on the day a # can help others pass on the information
- **Design a Logo:** This step is optional as you may wish to use your organisations branding or an estate for example already has branding you want to use. However, a logo can be an effective branding tool – offering immediate recognition of your event in all your publicity and promo items (e.g. T-shirts, water bottles, bags, pens etc.) – so it is useful to think of how you will use whatever you have or come up with something specific to the event.

10. Create a Publicity Plan

It won't matter how great your speakers are or how fancy the venue if no-one knows about your event. So, from the very beginning think about how you will tell people about your event.

Think about the audience you are trying to reach, if you the intended audience are people who are unlikely to be on social media then only advertising through \Facebook is not going to reach the right people.

Some simple steps to take are:

- An initial notice on your website and/or social media pages
- Put an article about the event in your next newsletter
- Email Save the Dates to your contact list
- Create posters and/or leaflets to send out

Remember to use your branding and include any sponsors logos on your publicity.

Don't forget about the after-event thank you's, sponsor acknowledgements and articles about the event's key messages or fundraising success.

11. Monitoring and Evaluation

Your plan should include details of how you will measure the success of the event: Have you achieved what you set out to?

You will need a mixture of measures and indicators, for example the number registrations, the number of actual attendees; total amount of donations or ticket sales; the number of volunteers and what they thought about the event.

Get creative when it comes to outcomes – unless it is a conference it is difficult to get people to fill in evaluation forms at events so try other methods such as speech bubbles that people can write what they liked about the event on and pin on a board; suggestion boxes; ask for quick video testimonies; use Instagram and other social media to capture pictures of people holding up a chalk board with short descriptions of how the event made them feel etc.

Most funders will require this information as part of their agreement with you.

When planning your event, you should ensure that you understand outputs and outcomes:

Outputs are easily measurable such as how many people attended your event, how many of them were women, young people, from BAME communities, and so on depending on the aim of your event.

Outcomes are about describing the changes, benefits, learning or other effects that happen as a result of the event, for example increased.

Support

If you would like any support with governance or any other issues facing your organisation, please contact the Development Team at Community Southwark: development@communitysouthwark.org or 020 7358 7020.

Appendices

Appendix I Useful Organisational Tools

Notebooks / Journals / Clipping

- [Evernote](#) – Remember anything.
- [Catch](#) – App for capturing, discovering and sharing.
- [Springpad](#) – Really, really smart notebooks.
- [Diigo](#) – Web highlighter, bookmarking and annotation tool.
- [Springnote](#) – Online notebook based on a wiki.
- [Awesome Note](#) – Combine notes with to-dos in one app.
- [Marro.ws](#) – Clipping tool for intellectual people.
- [Xinote](#) – Take notes in the cloud.
- [Pear Note](#) – Records keystrokes, audio, video and slides (Mac).
- [LifeTopix](#) – A personal organization app.
- [Bento](#) – Personal database for Mac, iPhone and iPad.
- [Mémoires](#) – Simple and secure diary (Mac).
- [Jottinx](#) – Simple and clean online note taking.
- [reQall](#) – Remember what's important to you here and now.
- [Yojimbo](#) – Effortless, reliable information manager (Mac).
- [Together](#) – Keep your stuff together, find it again easily (Mac).
- [Memonic](#) – A collaborative online notebook.
- [Simplenote](#) – Keep notes, lists, ideas and more.
- [TheBrain](#) – Mindmapping, brainstorming and GTD software.
- [Shovebox](#) – Capture notes, web archives and more for Mac.
- [RedNotebook](#) – A modern journal.
- [Mindspace](#) – Encrypted notes and file storage (coming soon).
- [Notability](#) – Unleash your note taking ability.
- [Notebooks](#) – An iOS app for taking notes.
- [Note Taker HD](#) – Take notes with a stylus on your iPad.

To-Do Lists / Task Management

- [Workflowy](#) – Easy, powerful and non-overwhelming list maker.
- [Taskforce](#) – Converts emails into tasks.
- [Coolender](#) – A whole new planning experience (Web/Android/iOS).
- [Pagico](#) – PIM + GTD + CRM.
- [Any.DO](#) – Make things happen with friends. Android/iPhone/Web.
- [Conqu](#) – Powerful multi-platform task management.
- [Things](#) – Awesome to-do list for Mac/iPhone/iPad.
- [Wunderlist](#) – Organize and share lists. Use them anywhere.
- [Omnifocus](#) – Professional-grade task management (Mac/iOS).
- [Flow](#) – Get things done with anyone.
- [Taskos](#) – To-do for Android with speech-to-text.
- [Tuex Duex](#) – A simple, designy, free web-based to-do app.
- [TaskPaper](#) – Ultra-simple to-do list for Mac and iPhone.
- [SimpleTask](#) – No-frills to do list for Mac and iPhone.
- [Dropkick](#) – Simple, elegant to-do for Mac/iOS.
- [Todo](#) – Task manager for iPhone/iPod.
- [Remember The Milk](#) – Online to-do list and task management.

- [Astrid](#) – Personal organization and group collaboration.
- [Todoist](#) – Personal task manager.
- [Tasskr](#) – Dead-simple web-based task manager.
- [Dooity](#) – Light and simple web-based list manager.
- [TaskMate](#) – The to-do list made simple again (Mac).
- [bTodo](#) – Online to-do and task management for you or a team.
- [Todo Brew](#) – Free to-do app for iPhone/iPad.
- [Sandglaz](#) – Personal and team online to-dos.

Mind Mapping / Vision Boarding

- [Mindiply](#) – various tools including Neonce, an online group mind mapping unlike any other: idea collation, curation, sharing and inspiration in an anonymous format.
- [MindMeister](#) – Online and mobile mind mapping (Web/iOS/Android).
- [Gliffy](#) – Online diagram and flowchart software.
- [Poplet](#) – Idea collection, curation, sharing and inspiration.
- [MindNode](#) – Easy mind mapping for iOS or Mac.
- [Idea Sketch](#) – Visualize, create, share ideas.
- [Mindomo](#) – Online brainstorming and mind mapping.
- [Corkulous](#) – iOS app for collecting, organizing and sharing ideas.
- [SpiderScribe](#) – Online mind mapping and brainstorming.
- [Maptini](#) – iPad app for collaboratively building mind maps.
- [iThoughts](#) – Mindmapping app for iPhone/iPad.
- [iBlueSky](#) – Mind mapping for iPhone/iPod.
- [Mindo](#) – Mind mapping for iPad.
- [iMindMap](#) – Mind mapping for Mac/iPhone/iPod.
- [TheBrain](#) – Mind mapping for Mac/PC/Linux.
- [MindHD](#) – Mind mapping and diagramming for iPad/iPhone.

People & Project Management / Team Collaboration

- [Rule](#) – Rule your work, enjoy your life.
- [Huddle](#) – Enterprise collaboration software used by HTC and KIA.
- [Thymer](#) – Easy project management for people who hate project management.
- [Basecamp](#) – The leading, most well-known project management software.
- [Skylight](#) – All-in-one productivity tool for projects, billing, tasks, files, invoicing.
- [Projecturf](#) – Manage projects, people and tasks.
- [Wiggio](#) – Collaboration software used by over 100,000 groups.
- [Wrike](#) – Fast, easy, enjoyable project collaboration.
- [Teambox](#) – Team productivity software used by Lego, Samsung, and Groupon.
- [Asana](#) – A shared task list for your team.
- [Checkvist](#) – Manage complex tasks together.
- [Nirvana](#) – Getting things done web 2.0 style.
- [AtTask](#) – Team collaboration software used by Adobe, HBO, NASA.
- [WorkMate](#) – Simple, agile project management.
- [Ganttter](#) – Web-based project scheduling made easy.
- [Mindjet](#) – Turn ideas into action.
- [LiquidPlanner](#) – Collaboration software used by Citrix, Yahoo and Honeywell.
- [Clarizen](#) – Collaboration software used by NBC Universal and Frito Lay.
- [GoPlan](#) – Flexible, reliable, secure project management.
- [5pm](#) – Project management, tasks, team collaboration and time tracking.

- [HiTask](#) – Team task management, virtual offices, collaboration.
- [Upvise](#) – The mobile cloud for smart businesses.
- [Nozbe](#) – Web-based time and project management for teams.
- [GroupTable](#) – Manage, store, share, plan, track.
- [Pelotonics](#) – Group collaboration software.

Miscellaneous / Other

- [Pageonce](#) – Automatically track and pay money and bills in one app.
- [1Password](#) – Account and password management (Mac/iOS).
- [Grocify](#) – Shopping list for groups.
- [Livescribe Smartpens](#) – Record digital notes on real paper.
- [Dragon Dictation](#) – Speech to text software for Mac/PC/iOS.