



Protect America's Climbing

HOSTING SUCCESSFUL EVENTS

A high-level take home resource

*This is just an introduction to the world of events. Please, do not hesitate to contact Heather for more information at heather@accessfund.org.

Event Planning Timeline Template (Applicable to all tiers)

→ 8-12 MONTHS OUT (PREPARE!)

- *Identify your event goals for the year/season*
 - How many plug and play, engaging, and fundraising events can you commit to?
 - What are your organizational key messages/causes for the year?
 - Consider and prepare your dollar (and time!) budget accordingly.

- *Name your dates (for engagements and activations) in coordination with prospective venues.*
 - Set your dates and times for engaging events.
 - Set your date or dates for your activations (fundraising) events.
 - Ask yourself - do I need special event permits for my venue location?

- *Create a MASTER SHEET (for engagements and activations).*
 - For whomever is running the event beast, I highly suggest creating an excel or google sheet that holds all event information, such the event timeline, marketing calendar, partner prospects, to-do's, supply list, expenses vs. revenue, etc.
 - Set your date or dates for your activations (fundraising) events.

→ 4-8 MONTHS OUT (EXPLORE!)

- *Create a short list of community influencers in your area that can serve as an events/planning committee and volunteers.*
 - Who do you know is psyched, organized, and ready to help? Find and invite them to serve on a voluntary events committee...the work should NOT just fall on you and your board.
 - Ensure this committee is diverse and represents your community's background and expertise.
 - Now that your event calendar is penciled in, consider making a shout out for organizational volunteers for the year/season.

- *Create a short list of special guests/speakers/potential event partners (cash and in-kind).*
 - This is crucial to begin early...and do not wait to start making asks!
 - Regarding cash/in-kind support, streamline your communications/asks by creating a simple, but branded sponsorship packet for easy dissemination.

- *Continually seek out opportunities to "plug in".*
 - Keep on the lookout for opportunities to promote your brand in person.
 - This isn't just for the 4-8 month timeframe...you should always be seeking these opportunities out as appropriate for your team/volunteer force.

→ 3-4 MONTHS OUT (SECURE!)

- *Solidify any contract services that you may need.*
 - Contract services include:
 - Bands, catering, av/tech, ticketing platforms
 - Are you bringing alcohol in for your event?
 - Make asks well in advance to get this donated!
 - Research the liquor licensing stipulations at your venue and in your state. You may need to apply for a license!

- *Secure your special guests / speakers.*
 - Keep on the lookout for opportunities to promote your brand in person.
 - This isn't just for the 4-8 month timeframe...you should always be seeking these opportunities out as appropriate for your team/volunteer force.

- *Continue to secure cash and in-kind support.*
 - This is an ongoing process!
 - Be sure to track your cash and in-kind support in an organized manner for donation letters following the event (if you hold nonprofit status).

- *Create your targeted marketing/promotional plan.*
 - Work with your team and planning committee to put together an event-appropriate marketing plan.
 - Consider the digital and paper platforms you want to utilize to make people aware of the event.
 - Vet and decide on the ticketing/RSVP platform that works best for your organization and the event.

→ 3-2 MONTHS OUT (CONFIRM, TELL THE WORLD!)

- *Double, triple check your dates, event details*
 - Ensure your contract services and venue are confirmed.

- Begin promotions!!!!
 - Create social/imagery/print assets that are branded to your organization and event.
 - Draft and publish a press release.
 - Update your website, calendars, and social media accounts to include the event.
 - Share the announcement with your community partners (and encourage them to share!).
 - Follow your marketing calendar as appropriate and adjust as needed.

→ 2-1 MONTHS OUT (PLAN SOME MORE!)

- *Consider creating the following in detail.*
 - Supply lists, run of show, volunteer cheat sheets, silent auction bid sheets, signage, displays.....
- *Determine your delegation plan.*
 - Define event role with team, committee members, and volunteers.
- *Continue promotions - the final push!*
 - Ramp up your marketing efforts as needed.
 - Showcase event highlights, exciting elements, and tease surprises.

→ 2-1 WEEKS OUT (GET ORGANIZED!)

- *Organize your supplies, in-kind, and day-of assets.*
- *Send last attendee reminders regarding crucial event information.*
 - Such as parking, attire, event timing, etc.
- *Do one last check of venue/contract services details.*

→ MAKE IT HAPPEN!

- *Give yourself ample time for set up -- who likes to be rushed?!*
- *Ensure your volunteers and delegated hands have everything they need to be successful.*
- *Monitor the attendee experience - is check in welcoming, smooth, and efficient? Are attendees getting the food and beverage easily? Is there a bottleneck to clear up in the crowd?*
- *Check in with volunteers and delegated hands OFTEN. Making sure they have a good experience, as well, will make them want to come back!*
- *Smell the smoke? Don't let event fires burn long - address issues with logistics or attendees as soon as possible.*
- *Stay until it's done - do not leave your volunteers or delegated hands on their own. Stay until the last attendee leaves and thank all applicable partners/services at the event.*
- *Stay calm and have fun!*

→ EVENT FOLLOW UP (Complete within 1 week of event)

- *Give yourself a darn solid pat on the back - you did it!*

- *Send all of the appropriate thank you's (personal emails or handwritten notes are the best) - this includes attendees, volunteers, your delegated hands, event partners, and contract services.*
- *Consider sending an event survey to attendees for larger events.*
- *Reconcile event revenue and expenses.*
- *Clean up/organize your supplies for next time (don't put this one off, it is the worst!).*
- *Complete an event analysis with your planning team. What went well, what didn't? What did it cost vs. what we brought in as revenue? What would we do differently?*

Event Platforms

Below is a short list of event platforms to consider, all of which I personally have utilized and have had great success with.

- Eventbrite
- Handbid
- GiveSmart
- Odoo Community Edition
- Brown Paper Tickets

Thank you for joining us today! Again, this is a high level preview into the world of events. Do not hesitate to reach out to Heather at heather@accessfund.org with any questions you may have.