



# EVENT PLANNING

A toolkit for  
community groups

Warrington  
VoluntaryAction



LOTTERY FUNDED



# WELCOME

Local events are a great way of bringing communities closer together. They can help to raise awareness of a place, or an issue, and can bring about a positive impact on the local community. You might organise an event to come together in celebration, a film night, a sports events, a community fundraising event or purely for entertainment such as a talent show.

This toolkit is a practical resource for anyone who is planning to organise an event. It will help to break all the work down in order to plan, design and run your event successfully.

This toolkit includes:

- ✓ Things to consider when planning your event
- ✓ Guidance on processes and procedures
- ✓ Guidelines in relation to current legislation





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Putting on an event can seem overwhelming; the following steps can help you achieve a successful event that everyone will remember.

## Step 1: Objectives

Every event should start off with a set of clear objectives. If it's not clear what you want to achieve from the event, it's worth asking why you are holding it! Clear objectives will also help you to plan an event which is properly targeted at the intended audience.

Discuss what you want your event to achieve – will it raise the profile of your group? Will it bring people together? Are you aiming to raise money or just to have fun?

Who are you hoping to attract to the event? Will there be activities for a range of different people?

## Step 2: Set the date and venue

- ✓ Planning the date is paramount; make sure it doesn't clash with anything else in the area or any religious or faith days.
- ✓ Give yourself enough time! Ideally, you should have 4-6 months to plan (depending on the nature of your event)
- ✓ Make sure any key speakers or guests are available on the date you want to hold your event.
- ✓ The type of event you are planning will help determine your venue. This could be in an outdoor public space or you could choose to book an indoor space. Whichever, venue you choose, you should ensure that it is accessible for all, easy to get to and is most suitable for your event.

## STEP 3: TEAM WORK

Most events are too much work for two or three people. The best events are organised by a good team, try to get a team of people together with different skills and expertise.

Having the right people will mean your event runs more smoothly.

You could think about asking other organisations to work alongside you... they may have the resources you need and share the workload.

## Step 4: Budget

No matter how big or small your event is you will need to plan a budget right at the beginning and try to stick to it.

You may have a great idea for an event, but you need to make sure it is financially viable.

You will need a budget to support your event clearly setting out costs and income, including any ticket sales, funding or corporate sponsorship you hope to achieve.



## Step 5: Marketing

The way you promote your event can make a huge difference to the number of people that attend and the impact the event can have.

There are various ways in which you can promote your event such as flyers/posters, local business advertising leaflets, using social media (Facebook, Twitter), ask other organisations to include you in their event communications. Use as many channels as you possibly can.

Try to get free publicity by using a press release.

## Step 6: Practicalities

All events need to be well planned if it is to be successful, safe and inclusive.

You will need to look at health and safety, risk assessment, legal responsibilities, insurances, accessibility, first aid, child protection, photography, transport, permissions and licenses.

It is a good idea to develop a checklist to ensure you have everything covered and you have considered every eventuality.

## Step 7: Working with Volunteers

Volunteers play a vital role in making an event a success and there are many opportunities for them to help. Event volunteering offers an opportunity to do a variety of tasks with a diverse group of people in different settings and create a great atmosphere. It is important to recruit the right volunteers and support them on their volunteering journey

## Step 8: Evaluate

A good evaluation will help you measure the impact of your event and build on your success. Talk with other members of the team to discuss what went well and badly on the day, and draw lessons for future event planning.

Make sure you have systems in place to gather together key information at the event, such as how many people attended, how people found about the event etc.

You will need to report back to funders on the performance indicators, ensure you have the information to be able to do this.

Make sure you send thank you letters to volunteers and helpers.

Good event planning means you know up front what you're trying to accomplish.

Clearly defined goals and objectives help keep you on target throughout the event planning process.

## Goals (the purpose of your event)

You will need to ask yourself what is the purpose of the event?

Is it to raise money for a particular purpose? Bring the community together? Encourage participation in something e.g. sport? Is it a celebration even? Is it for educational value?

## Objectives (what you need to do to make it happen)

Your objectives should detail what is going to be done, who is going to do it and what the outcomes will be.

Doing this at the beginning will help you to explain your event to others, for example potential funders, and will help to focus everyone involved.

**TOP  
TIP**

**If you're not sure how to define your objectives, think about using the SMART principle to create objectives that are:**

**S**PECIFIC  
**M**EASUREABLE  
**A**CHIEVABLE  
**R**EALISTIC  
**T**IME-BASED





# 3

## Timing your event

An event that is organised on the right date and time can attract more visitors and have far more impact. You need to set the date as far in advance as possible and book a venue.

What do I need to consider when choosing a date for my event?

### What is going on in your local area

You will need to think and enquire about what is going on in your local area. You do not want to clash with any other events that are going on, as this may have an impact on numbers (and you do not wish to upset other organisations). However, if there is another event you may consider working in partnership with them on a joint event.

### Important holidays AND Awareness days

Make sure you are aware of any statutory or religious holidays.

There are many awareness days and weeks throughout the year that you could link your event to. It may help you think of a theme for your event. Take a look at [www.awarenessdays.co.uk](http://www.awarenessdays.co.uk)

### Make sure you have enough time

Successful events are not planned overnight! It can take months to organise a great event. It is important to ensure you give yourself enough planning time, ideally you should have 4 – 6 months planning time, depending on the size of the event.

### Weather

Although we can never guarantee the weather it is worth taking into consideration the probable weather conditions of your preferred time. Will the weather affect your event and is there a contingency plan available.

### Other

Enquire to see if there are any road works or buildings works in close vicinity that may affect your event.

**TOP  
TIP**

**Once you have agreed on a date for your event, inform all relevant people immediately!**

The type of event you are holding will help to determine your venue. For example you are likely to hold a fun run outside whereas an awards evening will need an indoor venue. The location of your event can be key to its success and the numbers that attend.

Before you decide on a venue you will need to decide the type of event you are holding, your budget and how many people you are expecting to attend.

You can choose from....

### Outdoor Space

Outdoor public spaces can be great for your event and can help to attract a wider audience. However, you will need to consider what you will do if the weather turns out to be really bad. Don't forget you will need to get permission from the person who owns the land to hold the event.

### Indoor Venues

This can be a much safer option and tends to have all the facilities you will need, however it will potentially cost more and you will need to publicise your event more to get people to come.

Checklist when booking a venue –

- Hire costs (including any costs for setting up the day before and clearing up afterwards/ damage)
- Venue access – on the day/before and after
- Facilities – toilets/accessibility
- Venue contacts
- Full terms and conditions

You should get all this information in writing wherever possible. Keep a copy of any signed agreement.

### Accessible for all venue

Easy access to a venue is essential for a successful community event. You should do what you can to ensure that disabled people can take part in your event. For example, if possible, choose a venue which is accessible for wheelchair users, and provide a British Sign Language interpreter for speeches and performances.



Working with a team of people will make life easier. Most events are too much work for two or three people. The best events are organised by a good team, try to get a team of people together with different skills and expertise. The size of the team will vary depending on the scale of the event.

By sharing out the work you make sure that it's done thoroughly. One person can't do it all but the Event Organiser has to be able to co-ordinate the work of the different committee members or sub-committees. These are the areas your group should cover; it may be that one person does more than one of these roles but try not to overload anyone.

### Event Organiser

Overall control, the person to whom all report.

### Event Safety Co-ordinator

Health and Safety of everybody involved.

### Programme and content

Activities and organisations.

### Budget

Accounting, income and expenditure in all areas.

### Promotion

Awareness, publicity, media, etc.

### Personnel and staffing

Personnel, duties, volunteers, etc.

### Administration

Programmes, printing, box office, legal, insurance, etc.

### Technical


Resources, equipment, preparation of these, etc.

### Services

Parking, cloakrooms, information, first aid, toilets

### Catering and social

Facilities, outside caterers, crèche



HAVING THE RIGHT  
PEOPLE WILL MEAN  
YOUR EVENT RUNS  
MORE SMOOTHLY!

An event budget is a great way to map out all the areas of income and expenditure. The budget will ensure that the event is viable to organise and execute.

You will need a budget to support your event clearly setting out costs and income, including any ticket sales, funding or sponsorship you hope to achieve.

Start with an outline budget using indicative costs and your proposed sources of finance, and firm up the detail once you start to get income information and quotes from suppliers.

To help you manage your event's finances, it's a good idea to keep a 'live budget' on an excel spreadsheet on your computer.

## Costs

You will need to consider all the costs so you don't end up with any surprises!

Below is a list of just some of things you will have to think about;

- ✓ the venue
- ✓ publicity and marketing
- ✓ hire of equipment
- ✓ decorations (balloons etc.)
- ✓ entertainers/speakers
- ✓ prizes, refreshments, face paints, art materials
- ✓ transport
- ✓ phone bills, postage and other admin
- ✓ insurance
- ✓ first aid equipment and volunteers
- ✓ fees for licences and permissions
- ✓ returnable deposits

## Income

You will need to consider how you are going to cover your costs. This could be through grants, corporate sponsorship, sales and other monies made on the day.

It's a good idea to keep a contingency fund of about 5% in case of unforeseen costs.

## Financial Responsibility

You might also want to think about how you make decisions about spending. As with any plan, financial responsibility must be clearly allocated, including who is liable in case things don't go so well. Set out responsibilities clearly in contracts with suppliers, funders and sponsors.



There are a number of different ways you can raise income for your event such as corporate sponsorship, fundraising and getting what you can for free!

### Corporate Sponsorship

Sponsorship is a two-way agreement between a charity and a business. The charity gets help with the expenses of the event and in return the company gets publicity, low-cost marketing, and good will. Organisations may not give you direct cash, be prepared to let them know what else would be useful. For example, volunteers, tables, food or drinks.

Being prepared is key to gaining successful sponsorship. Below is a list of things you will need to think about before you approach a potential sponsor or sponsors.

### Think about your audience

Think very carefully about the audience your event will reach and make a list. Will it be children? young people? the elderly? families? Also think about the entertainment you will have at the event, stalls and vendors?

Once you have a list of possibly audiences, make a list of potential businesses with the same audience. For example if your audience is families consider restaurants, car insurance firms, book shops etc. This match of audiences will be those organisations you will target for sponsorship.

### Phone, write, email or visit a potential sponsor?

Most businesses receive lots of letters of charities asking for freebies or sponsorship. If you do write a letter, ensure it is personalised and definitely follow up with a phone call. Do consider cold calling but be prepared with “your pitch”! You must know your organisation well, what your event is for and what it is you want. Also, research the organisation, try to find out what their agenda is and whether they have a corporate social responsibility policy. Consider asking them to visit your group.

### Create realistic benefits

An organisation is highly likely to want something in return for their sponsorship, it is not a one-way agreement. Consider including their name on your webpage, newsletter and all event media. Prolonging the impact of the sponsorship beyond the event by continued media coverage and secondary events.

## Make use of existing contacts

Identify contacts and organisations that you or your colleagues have connections with. Try and ask people you know!

### TOP TIP

Budgeting for your event is the best way of avoiding any nasty surprises and keeping a track of your spending. See our supporting template for an easy budget sheet.

## Freebies

Everyone loves a freebie and there are so many of them out there to hand.

Call upon peoples goodwill, you can always offer them something in return at your event. Always remember your most valuable asset is people's time and skills.

Contact other local community groups and ask to borrow resources, also check out [www.warrintonva.org.uk](http://www.warrintonva.org.uk) for a link to a supply of shared resources for community groups.

## Funding from grants

There may well be an opportunity to apply for funding for your community event. As with corporate sponsorship, applying for funding will mean you need to be prepared. Your budget will be the key to your success, make sure it is as accurate as possible.

## Charging attendees

Depending on your organisation, the event you are hosting, how you are set up/constituted and who is likely to attend, you can charge for attendance. Think about if your potential attendees are likely to be able to afford it. Is it worth the money you are charging? Can you offer a subsidised cost? Charging for an event can put a 'value' on it for the attendees and people are more likely to attend something they have paid for.





## Promoting your event effectively

You will need to start promoting your event as early as possible so you can reach your target audience successfully. It is important to reach as diverse an audience as possible, think about how and where you promote your event.

Don't forget that not everyone has access to computers or the internet, so use as many channels as possible whether it is by word of mouth, coverage in the local media or social media.

### Local Media

Local media can be a very effective to get information out to the public. Consider contacting local papers, radio and community papers. Local media may even be able to send a reporter and photographer to attend on the day of your event.

The template press release below will help you when preparing to contact local media. Make sure you have a named contact for press releases. When writing a press release remember the 5 W's; Who? What? Where? When, Why?

### Posters

Posters can be a good means of communicating key information about your event and attracting attention. They should be carefully designed to feature vital information such as event name, date, time and venue along with information on tickets, contact and sponsor details without overloading with text and images. You may also want to include other information such as entertainers, activities, style/type of event.

### Flyers

With a similar design to posters but being smaller in size (normally A5 or A6) and often being double sided they can be distributed in a range of places. For example you can ask to leave them at local leisure facilities, retailers and even doctor's surgery's, or post through letter boxes helping to get the message to the relevant people.

## Social Media

Social media such as Facebook or Twitter can be ideal to engage large numbers of people and communicate your event to your target audience quickly. It is a low cost form of promoting your event whilst having the ability to incorporate photographs, videos and music. Social media can be helpful not just in promoting your event before it happens but also during and after the event.

Using social media may mean setting up a brand new page for your event or using existing Facebook or Twitter pages linked to your group. You can encourage people to share your event which can be a great source of free publicity. You can also tap into other relevant pages to help create a buzz about your event.

## Event Website

Event websites can provide up-to-date information about your event, any competitions, sponsors and can link to your social media sites such as Facebook and Twitter. Websites can be relatively simple and cheap to produce.



**The below structure isn't just useful for writing a release for communication, it's a helpful checklist for posters and all promotion.**

Communications Release Structure	
For release- insert date	
Headl ine	Write something catchy about your event
<b>5 W'S</b>	This is where you tell people the details of your event
<i>Where</i>	Tell people where your event will be held
<i>Who</i>	Let people know who will be hosting the event
<i>When</i>	Don't forget to include the date of the event
<i>What</i>	Explain what the event will be, for example a fun day and describe some of the activities available
<i>Why</i>	Tell people why you are holding the event
Quote	It can help to include a quote either from yourself or someone else about the event.
Ends	
Notes to editors	
Contact detail s	Include your contact details again For more information or to support our event please contact (include contact number/website, facebook page or twitter)
Further Information	Provide more details about your group





# PROTECTION

It is your duty as the event organiser to ensure that employees, volunteers and event attendees are safe at your event.

You will need to plan, monitor and evaluate the event and also plan for incidents and emergencies.

**Remember Health and Safety does not need to be complicated!**

## Legal Responsibilities

As an organisation you need to be aware of your responsibilities when organising an event. As a voluntary organisation you have a 'duty of care' not to harm or endanger anyone as a result of your activity.

**Duty of care** – this is the legal obligations towards your customers (e.g. event attendees)

Make sure there is a clear understanding who will be responsible for safety matters.

## Risk Assessment

The first step will be to complete a thorough risk assessment. This will need to be done in the planning process of your event and will help you to identify risks and how you can minimise them.

The risk assessment should identify risks related to every area your event including the type of event you are holding, the type and size of your audience, the location, time of your event, equipment, participants, emergency points and safety information.

Your risk assessment need only include what you could reasonably be expected to know – you are not expected to anticipate unforeseeable risks. Remember, no activity is completely free from risk, and doing a risk assessment is not about making your activities risk free.

Be sure to review your risk assessment regularly to ensure that the actions being taken to minimise risk are working and then update if necessary.

The Health and Safety Executive has put together some helpful information on the legal and safety implications of running an event. Visit [the Health And Safety Executive](#) for further details.

## First Aid

Although there is no legal requirement for first aid at events, it is good practise to provide some level of provision. Ideally every event should have at least 2 first aiders.

Talk to local professional first aid group such as the Red Cross or St John Ambulance.

All first-aiders should be easily contactable during the event by radios or mobile phones.

Preferably make first aid stations visible and well signposted.

## Insurance

In organising an event your group has 'public liability', meaning that if something were to happen such as an injury to somebody or damaged property you could be responsible.

Hence, it is a good idea to have Public Liability Insurance for your event. This will cover you for any of these incidents that may occur. You need to make sure that your insurance covers all of the activities at your event. It is a good idea to do this early on in the planning stage.

You may also want to consider 'Equipment and Property Cover' and 'Cancellation and Abandonment Insurance'.

## Access

Your event should be as inclusive and accessible as possible in order to engage all members of the community. It's important not to forget that access issues are not just about people with physical impairments: there are many other factors which you should consider. Some people have sensory impairments, experience mental distress (e.g. claustrophobia or anxiety) or have learning difficulties and their access needs must also be considered.

Think about whether the venue and facilities are accessible, can you get there by public transport, has it got adequate car and bicycle parking, is it easy to find?

When thinking about your event being accessible for all it is also worth considering catering.

Food and drink are a good way of bringing people together and making people feel welcome. Food plays a key role in many belief systems, so it is important to ask people about their specific dietary requirements or allergies.





## Licences and Legisl ations

You may need to register or apply for a licence for your event, try to do this as early as possible, some license can take months.

### Fil m screenings

If you are holding a film night outside your own home or the cinema, you will need a screening licence to ensure that you are not breaching any copyrights.

There are different licences that you can get, depending on whether you are planning a one-off screening of a film, or a number of film nights throughout the year. You can apply for a license through [Filmbank](#) or [MPLC](#)

### Music

If you play music at a public event (or to promote your organisation to the public) you may need a music licence to show that you have permission from the owners of that music. You can find further information on entertainment licenses from [GOV.UK](#)

### Festival s, street parties, and publ ic meetings

Your local authority or police may have local byelaws, which require you to inform them if you are holding a public meeting or event, or if you want to obtain a 'public entertainments licence'. If you are unsure of anything, it is important that you get in touch with their licensing department as they will be able to advise you. It is a good idea to check with them in any case, as there may be things you are unaware of; for instance, the police may impose certain conditions for safety reasons if they feel it is necessary.



## Raffles, bingo or roulette

It is important to check that your raffle or fundraising activity abides by the following rules:

- ✓ Must be run for charitable, sporting or cultural purposes
- ✓ Proceeds must not be used for private gain
- ✓ No more than a specified amount of money can be spent on purchasing prizes
- ✓ No money prizes can be awarded
- ✓ Tickets can only be sold during the course of the event or entertainment and on the premises in which the event is being held

If your activity may be considered as gambling and does not fall within the above boundaries, then you will need to register it with the Gaming Board for Great Britain.

## Food and alcohol

If you are preparing or selling food at your event, you must make sure that you comply with food hygiene laws. If you are using an outside caterer, it may simply be a case of checking they comply. There is plenty of guidance available on the Food Standards Agency website. If you are serving or selling alcohol at your event, then local licensing laws must be applied. You may need a Temporary Event Notice (TEN). You can contact the council to apply for a TEN. You must do this at least 10 working days before your event. You must send a copy of the TEN to the police at least 10 working days before the event.





Volunteers are key to a successful event and you should start to plan for volunteers early in the event process. Volunteers will lighten the load, help spread the word about your event and bring in a handful of essential skills. One of the first things you will need to consider early on is how many volunteers you need and the volunteer roles needed to help your event.

### How many volunteers do you need?

Each event is different however sound planning can help to assess the number of volunteers you need. Think about your event from start to finish and break it down into sections and tasks, for example, marketing, setting up, registration. Ask yourself how many volunteers are needed for each section? Can the volunteers do more than one section? Consider having a team leader for volunteers who can help co-ordinate volunteers on the day.

### Roles

You will need to establish the role and purpose of volunteers. If you don't already have one it can help to write out a volunteer policy as well as volunteer role descriptions. Role descriptions will help volunteers understand the purpose of the role, why they should volunteer, the aim of the event, how long they will be volunteering for and any training that will be offered.

### Advertising for Volunteers

It is important to advertise for volunteers through a variety of channels and to a diverse audience.

A good place to start is by advertising your volunteering opportunities through inVOLve at Warrington Voluntary Action. You can also access a pool of volunteers here that have already expressed an interest in volunteering. Other ways of finding volunteers is through social media, word of mouth, talking to groups and networks.

### Training

All volunteers should attend a training session that will assist them and help them prepare for their volunteering roles.

The support and training that a volunteer receives must be appropriate both to the role they carry out and to their individual needs. It should ideally include information on the event, training on any particular activities and details of where and when to meet on the day. Some people may need extra support or additional training in order to complete the tasks they have been set. Do not prejudge what support is needed – ask them!

## Looking after volunteers on the day

- ✓ Bring a detailed event schedule with tasks and timings from your arrival to when you leave.
- ✓ Make sure a named volunteer has been allocated to each task on the schedule, with a named person in reserve.
- ✓ Have all the details of your volunteers to hand and keep them safe, so you know who to expect and when, know if anyone didn't make it, and so you can thank them later!
- ✓ You will need to brief your volunteers when they arrive, welcome volunteers, show them the venue, let them know how to contact you and discuss health and safety.
- ✓ At the end of the day don't forget to thank the volunteers and ask them about how they feel the event went, this will be valuable feedback.
- ✓ Make sure volunteer expense forms are handed out.

## A few common problems and how you can overcome them!

**No Shows** – It is likely that some volunteers may not show up on the day; however you can try to reduce this by:

- ✓ Ensuring you have a good relationship with volunteers, make them feel a part of the team!
- ✓ Contact every volunteer a few days before the event to confirm attendance.

**Volunteers not getting on** – Take time to support all volunteers and be sympathetic. If there is a personality clash between volunteers be prepared to change volunteer roles.

**Overworked** – Be sure that all volunteers get a break on the day and if some jobs are boring, make sure volunteers move around to different roles.... Volunteers need to feel valued!



Having worked hard to plan and deliver your event, the final stage will be evaluating your event to measure the impact your event has made and how you can build upon its successes for future events. Sponsors or funders will also expect you to report back to them on key outcomes of your event.

Evaluation starts at the planning stage, look back at your aims and objectives and see if you have met those targets. You need to think about what you want to evaluate for example attendance, how people found out about the event, did they enjoy the event. Make sure the method of evaluation you choose enables you to gather this data in a clear and concise way.

### Feedback forms

Why not ask people to fill in a feedback form at the end? The event will be fresh in their mind, so you should get accurate responses. You could even have a prize draw for completed forms to encourage more people to complete them.

### Interviews

If you have the time on the day of your event talking to attendees can be a key source of qualitative information. However this can be time consuming and you need to ensure there is no interviewer bias.

### Observations

Photographs and video footage can be great to capture an event.

### Keep Your Audience Engaged

Immediately after your event connect back with your audience by sharing memories, upload pictures to a photo album Facebook and share it with your guests. It will remind them of the highlights of the event and they'll be looking forward to next year's event.

### Thank you!

Make sure you follow up your event with thank you letters to volunteers, staff, participants and stakeholders for their support. A thank you can go a long way and they may be willing to help out again.



**TOP  
TIP**

**Remember, an event that doesn't quite go to plan shouldn't be viewed as a failure, but rather as an opportunity to learn and grow your future events!**



# Warrington VoluntaryAction

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[WWW.WARRINGTONVA.ORG.UK](http://WWW.WARRINGTONVA.ORG.UK)

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With thanks: this course has utilised  
information and research from the  
following organisations and groups.

