Journey of a Group:

Planning an event - A checklist

Overview

Whether you're hosting a fundraising event, awareness campaign, or community gathering, effective event planning is essential for success. This factsheet will walk you through the key steps to ensure your event runs smoothly and achieves its objectives. Not all aspects will be relevant to your event but it is a good guide for most types of event.

The planning committee

Formation: Gather a committed group of people to support the planning of the event.
Support needs: Identify the type of support you'll need from your committee. E.g. list all the tasks.
Communication: Will you have meetings (face to face or online), use email, messaging etc.

Define your purpose and goals

Purpose: Clarify the primary aim of the event. Raising funds, building community relationships, promoting a cause, celebrating achievements?
Goals: Set clear, measurable objectives (e.g., raise £500, attract 100 attendees, recruit new volunteers).

Know your audience

Demographics: Consider the age, interests, and background of your target audience. Tailor your event to their preferences and needs.
Accessibility: Ensure the event is inclusive, considering any special needs (e.g., wheelchair access, translation services, dietary requirements).

Tip: Involve your audience in planning where possible to ensure your event resonates with them.

Budget and resources

Budgeting: List all potential costs. Be thorough, realistic and plan for unexpected expenses. Will you need any licences or permissions for your activities?

Potential costs

Venue hire	Publicity	Equipment hire
Decorations	Entertainers	Prizes
Refreshments	Transport	Volunteer expenses
First aid equipment	First aid provision	Marketing
Insurance	Licences and permissions	

Funding: Consider how you will cover the costs. Will you seek sponsors, apply for grants, or charge attendees?

Potential incoxme

Entry fee	Raffles	Selling refreshments
Voluntary donations	Sponsorship	Concession fees
Stalls	Money-making sideshows	

Resources: Identify volunteers, staff, or contractors you may need. Ensure you have enough support to deliver the event successfully.

Tip: Aim to create a contingency budget for unexpected costs.

Venue and date

Venue Selection: Choose a venue that aligns with your event's purpose. Ensure it's easily accessible, appropriate for your audience, and has the required facilities.

Date and Time: Consider timing (day of the week, time of day) and avoid clashes with major local events. Allow enough time for promotion and preparation.

Tip: If you're considering outdoor venues, always have a backup indoor option in case of bad weather.

Event format and program

Agenda: Create a clear schedule of activities, including breaks, speeches, entertainment, and networking opportunities. Stick to time to keep the event flowing.

Speakers and Entertainment: Confirm any speakers, facilitators, performers, or other participants well in advance. Ensure they align with the event's goals and audience expectations.

Tip: Be sure to include time for Q&A or audience interaction to engage attendees.

Health, safety and risk management

Risk Assessment: Identify potential risks (e.g., weather, crowd control, health emergencies) and plan for them.
Health and Safety: Make sure you have adequate insurance and meet legal requirements, including fire safety, first aid provision, and any specific health and safety regulations.
Accessibility: Make sure your event is safe and accessible to all, including those with physical or sensory impairments.

Tip: Have a designated safety officer to manage any emergencies during the event.

Marketing and promotion

Marketing Plan: Develop a strategy that includes social media, flyers, posters, email newsletters, local media, and word of mouth.
Branding: Ensure your messaging aligns with your organisation's brand and mission. Keep it clear, concise, and engaging.
Engage Your Network: Encourage supporters, volunteers, and community partners to promote the event via their networks.

Tip: Start promoting early and use countdowns and reminders as the event date approaches.

Registration and ticketing

Ticketing: Will you charge for tickets, or will it be a free event? Will you use platforms like Eventbrite or Google Forms for easy registration management.

Capacity: Know your venue's capacity and plan accordingly. Don't overbook or under-book.

Tip: Early-bird/group discounts can boost ticket sales and garner interest.

Event logistics

Equipment and Supplies: List everything you need (AV equipment, signage, supplies, catering, transport). Ensure all items are booked or ordered in advance. Bolton Council may be able to provide you with [event infrastructure items.](#)

Staffing and Volunteers: Assign roles (e.g., registration desk, event coordinator, tech support). Brief them about their responsibilities.

Refreshments: Plan food and drink options, taking into account dietary restrictions, quantity, and logistics.

Tip: Have a checklist to ensure nothing is forgotten on the day.

Follow up and evaluation

Feedback: After the event, send out surveys or ask attendees for feedback. What worked well? What could be improved? Use this for future event planning. This will help you to measure impact.

Thank You Notes: Show appreciation to attendees, volunteers, speakers, sponsors, and donors. This helps build long-term relationships.

Report Back: If fundraising was a goal, report back to your supporters on how much was raised and how the funds will be used. This will help to keep your stakeholders engaged.

Tip: Capture photos or videos during the event for future promotion and to share with your community.

Successful event planning involves careful thought and organisation, but with the right approach, you can create an impactful and enjoyable experience for all involved. Use this factsheet as a guide and remember that every event is an opportunity to strengthen your community, raise awareness for your cause, and build lasting relationships.

Further Sources:

Your event – Bolton Council
Organising a voluntary event: a 'can do' guide - GOV.UK
Planning A Charity Event Checklist
Charities and risk management (CC26) - GOV.UK
Charity fundraising: a guide to trustee duties (CC20) - GOV.UK
Code of Fundraising Practice | Fundraising Regulator

This factsheet is for guidance only. For any further information, guidance and support, please contact Bolton CVS on: 01204 546010 or e-mail: info@boltoncvs.org.uk