

# Member Engagement EVENT PLANNING GUIDE

engage@catholicunited.org  
1-800-568-6670



Catholic United  
**Financial**



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## Sample Event Checklist

What to consider before an event:

- Select a Primary Event Organizer from your Event Team as the main contact person.
- Select the event date and room/venue. To avoid potential conflicts, consult the parish calendar.
- Set up a timeline for planning the event, including tasks and persons responsible.
- Prepare schedule for the day of the event:
- Prepare a budget:
  - Identify who will pay for the event
  - Determine break-even amount if applicable
  - Consider and estimate possible costs
- Venue/Location
- Food/Catering: number and type of meals
- Speakers: honoraria/gifts
- Travel and Lodging
- Consider possible income
- Registration fees/stipends
- Work with the Publicity Lead to determine advertising/publicity needs.
- Work with the Volunteer Lead to determine volunteer needs.
- Determine handout needs
  - Name Tags
  - Folders
  - Printed program
  - Pads/pens
  - Gifts
  - Other
- Registration – Events
  - Set registration procedures
  - Set a realistic cancellation date based on the number of registrations received
  - Set up registration database
  - Determine notification process
- Determine technology requirements
  - Sound/microphones
  - Video/audio recording
  - Lighting
  - Computer technology
- Event Logistics - Events
  - Setup – tables and chairs, technology
  - Registration Desk staffing
  - Place cards
  - Speaker Gifts
- Cleanup

# Sample Event Planning Timeline

## 3 Months Out

- Create a committee to help with the planning and participate on the event day
- Design a theme or brand feel for the event
- Nail down exact total budget amount (then deduct 10% to use as actual amount)
- Set the date- Checking all calendars (parish, school, national, special guests, etc.)
- Send out save the date information if applicable
- Secure a location
- Invite and confirm with speakers/hosts if applicable

## 2 Months Out

- Compile a guest list
- Contact and book food caterers
- Develop a program for event (be sure to schedule breaks between speakers, etc.)
- Establish who/what is the entertainment if applicable
- Develop PR/invitations medium

## 4 Weeks Out

- Send out/post invitations, making sure all the appropriate information is included
- Develop menu with catering company (be sure to note any special needs, dietary etc.)
- Establish who will capture the event (Coordinate with Publicity Lead)

## 3 Weeks Out

- Organize promotional/marketing activities (Coordinate with Publicity Lead)
- Establish your events staffing needs (Coordinate with Volunteer Lead)
- Plan for traveling needs of guest (parking, drivers, etc) if applicable
- Establish what AV needs there are (make sure you ask your speaker what they will need)

## 2 Weeks Out

- Confirm: RSVP list, catering/drink menu and any additional vendors
- Pay deposits
- Call any guest that have not confirmed their acceptance/decline of invitation

## 1 Week Out

- Brief staff and ensure everyone knows what their job will be day of event
- Confirm all arrangements again
- Make sure event (if appropriate) is well advertised (posters, flyers, etc.)
- Pre-pay parking or any charges guests might incur

## Day of Event

- Give yourself plenty of time to set-up
- Check all AV inputs and chair arrangement
- Meet caterers and ensure there are the proper accessories (cups, forks, etc.)
- Serve as host
- Clean up

## Post Event (within one week)

- Make sure all invoices are turned in and paid by the Administrative Coordinator
- Complete budget chart
- Fill out Post-Event Evaluation (cc those necessary)

## Sample Event Evaluation

Name of Event:

Date/Time of Event:

Location of Event:

Description:

1. Did the event fulfill the purpose that was intended?
2. Did the event meet your goals? What went well? Why or why not?
3. Did the date and time work well? What suggestions would you make for holding this event in the future?
4. Did the location work well? What would have worked better?
5. What parts of the publicity plan worked the best? Was it timely? What would you change for future events?
6. Was the budget accurate? Would you recommend cutting or adding items for the future?
7. Did you utilize outside vendors (food/entertainment/speakers)? Who were they and would you use them again? Why or why not?
8. In what ways did the Catholic United Volunteer Team work well together? In what ways could you have better included/utilized members? Did everyone follow through with their assigned responsibilities?

9. Additional Comments: