

8 Steps to Plan a Successful Event

Use this 8-step questionnaire to establish a planning process for major Chapter events. The Chapter Leader, Board, and Event Committee can use this tool to ensure the fundamental information is discussed and established.

Step 1: Establish the *Why*

Consider: What is the purpose of the event? What is the desired objective? (Keep this goal in mind as you proceed through the rest of the steps)

Step 2: Establish the *What*

Consider: What kind of event will this be? Does it take place on one day or over several days? How many speakers would you like to have? What level of engagement would you like participants to have?

Step 3: Identify *Who*

Consider: Who is the target audience? What is the desired number of attendees? How will you contact members of the community to participate?

Step 4: Identify *Where*

Consider: What are potential locations for this event? What are the requirements of the space? Will you need overnight accommodations for attendees? Will you require catering? How many meals will you serve?

Step 5: Articulate *How*

Consider: What is the budget and the needed resources? How will the event be paid for? Identify potential sources for sponsorship. Identify the major costs: venue rental, meals, transportation, A/V, printed materials, etc. Are there resources you can get for free?

Step 6: Distinguish *Roles and Responsibilities*

Consider: Chapter roles and responsibilities. Who will be taking lead on the event? Will there be an event committee formed? What are the accountabilities for those involved from the Chapter? Will you require paid or volunteer support?

Step 7: Articulate *Support Requests*

What are your support requests for CCI? What tools or resources will you need to be successful?

Step 8: Establish *Next Actions*

What are the next actions that need to be taken to move the planning process forward? Who will own these next actions?

