



The Nonprofit Imagineers EVENT PLANNING CHECKLIST

Imagineers create exciting and impactful events and programs by incorporating as many Imagineering techniques as possible. Whether creating a large event or a small recurring program, utilize this checklist to ensure you are creating the best possible experience. If you can incorporate one or two of these, that's great! If you can check all the boxes, even better!

Answer these questions in your head, as a group, or create a copy of this document for each event and type or write your answers below each question.

Early Planning

☐ Determine your Creative Intent

Remember - creative intent is like a mini mission statement, and doesn't tell you what to do, but rather, what the goal is of the event.

☐ Brainstorm Creative Ideas

Whether this is the first time you've done anything like this, or a recurring program that's on autopilot, spend a few minutes Blue Skying new ideas that might be fun to work into the event. Ideas might impact the program itself, marketing, the physical space where the event will be held, or items that will be given out, such as handouts or promotional materials.

☐ Solve Problems

Are there any problems you foresee? Space or time limitations? Personnel? Marketing? Funding? Get the list of problems out on the table early so that you can solve them as you design your program.

☐ Involve Your Cast

Be sure everyone is on the same page and knows the relevant details about the program so that they can communicate them to your community members. Also, ask your cast (which might be staff, volunteers, board members, or committed community members) for their opinions. You don't need to do everything they suggest, but new ideas come from those with different experiences and expertise.

Marketing & Communications

☐ **Build Your Story**

Do you have an annual theme or story? If you do, how does this event fit within that story? Is it part of a specific “chapter” of your year? Does it complement a fundraiser or something else that you might be marketing around the same time? Decide how to work this event into that story, and above all, be sure that it doesn’t conflict with any other story elements that you or a member of your team might be working on. If you don’t have an annual theme or story, you can still double check that your program doesn’t conflict with another.

☐ **Determine Your Hero’s Journey**

Remember - all good stories have a hero, guide, and challenge. What “challenge” is presented for your hero (the attendee) to address? The challenge might be related to learning something new, raising funds, meeting new people, or helping those in need, among many other possibilities. This probably goes hand in hand with your creative intent that you determined above. How will you, the guide, help your hero meet the challenge during this program? This should inform your publicity and help turn a basic flier into a call to action.

☐ **Design the Preshow**

The story of your event or program begins at the point of first contact - when your attendee (the hero) first learns about the program. Take a moment to determine when the preshow begins, and then brainstorm each of the preshow elements, including the first invitation, the steps associated with RSVPing, subsequent communications, etc. Keep in mind, some of these might be things you’ve never thought about or have done before. Just because you’ve never sent a personal follow up email a few days before the event, that doesn’t mean you can’t add it to your preshow.

Once you determine what your preshow should include, create a plan for each of those elements. Write the text for the confirmation email. Create a plan so that you can follow through with all of your bluesky dreams. Think about how each email invitation and reminder to the community will progress the story rather than being simple duplicates of each other. The more you can plan now, the easier it will be to implement later.

☐ **Design Your Postshow**

It might be tough to develop a postshow right now, and it might change based on how the event itself goes, but brainstorm ideas for how you will close the story loop after the event. Will you send an email? Make a phone call to thank attendees? Send a picture and a note in the mail? Start to come up with a plan right now, and develop it further as the program nears. Sometimes the program itself can change as you come up with new creative ideas for your postshow!

Design the space

If your event is entirely virtual, this section might be a little bit less useful, but I challenge you to consider these anyway and try to come up with virtual methods to Imagineer!

☐ **Pick a weenie**

As you recall, a weenie is a visual that draws attention and provides visual stimulation. Even if you have a small program, religious service, or class, think about visuals that give a little “wow” factor to the space inside the room or in the areas leading up to it. What can you add that no one would have expected? What kind of signage can you create that doesn’t advertise anything, and is just there to make people feel good?

☐ **Do a little environmental storytelling**

How can you use the space to tell the story? This might be something you include on your campus prior to the event to get people excited to attend, or it might be something you add to the hallway as people walk into the event itself, setting the mood for the program.

☐ **Add a Hidden Mickey**

Is there anything clever that you can add to the marketing, communications, space, or program itself that is totally unnecessary, and might not be noticed by all, but gives a little extra flair? Have fun with it! If you’re not smiling during this process, you’re doing it wrong!

Wrapping it up

☐ **Was it a success?**

Remember - success means different things to different people. Just because your turnout was low, that doesn’t mean it wasn’t a success in other ways. Determine how your event was successful and how you might have come up short. Remind people about the ways you succeeded thanks to Nonprofit Imagineering.

☐ **Always Be Plussing**

If your event recurs weekly, monthly, or yearly, make notes about what you could have done better. Figure out how to plus as much as possible. If this event recurs regularly, plus every time!

Share your feedback!

Is something missing? Find a spelling error? Did you just pull off the greatest event ever? I’d love to hear from you! Email me at ben@thenonprofitimagineers.com. Seriously!