

---

# The *Details* of Special Events: *How to be an Event Jedi...*

BY ALI VOGT

**A**s a special event consultant to nonprofits, I am often asked how I deal with the small details of up to eight special events for eight different clients at one time. I wave their compliments off with a shrug of the shoulder and a smile: “Oh, it’s no problem, it’s easy.” But upon delving deeper, I ask myself, “What quality do special events coordinators need to have to successfully deal with all the details?” After much research and extensive interviews I have narrowed this quality down to two words: Be Anal.

What do I mean? Friends laugh when I plan the logistics of a simple picnic down to 10-minute intervals. I put together an extensive list of who is bringing what. I envision what could go wrong and have a back-up plan if something does. Forgot the Frisbee? No problem, I have one in my bag. This “anal ness” runs even more rampant in my work life. If I need to make photocopies for a meeting, I do it myself in case the copy shop should make a mistake. If 300 donated bags aren’t received two days before they are needed for an event I’m on the phone with the Community Relations department at Macy’s to get bags donated. Get it? I’m compulsive about details and follow-through.

If this isn’t your natural mode of being—don’t fret. You can still be successful at event planning. Here are some tips to make up for being completely normal that will help you become an Event Jedi.

## **1. Envision what will happen during the event as if you were a guest.**

I find it helpful to envision myself as an event attendee and simply walk through the event in my mind. Where would I want to congregate? Where is the food most accessible? Where will bottlenecks occur? I also note if the event space is too crowded or, on the contrary, if it feels like an empty warehouse.

As a guest, can I avoid being stuck in a line at registration or getting food? Can I network and mingle with people (which is what people want to do when they go to events)? Can I see the stage from my chair or easily see and hear the entertainment or main attraction?

Talk through the flow with your co-workers, committee members, or friends. Get their opinions on what

would seem comfortable to them as a guest.

Now take these images and start strategizing. You have time now to revamp your plan, months before your guests would have to go hungry.

Next, envision what could go wrong. What is the worst thing that could happen? An attendee has a heart attack? A rainstorm comes through and douses your agency’s 20th anniversary picnic? Go through strategies in your mind of what you will do if something goes awry. When creating back-up plans, think through who and what your resources are. Is there a shelter near the location of your picnic? Be sure to reserve it. Even if you don’t use it, you will look like the supreme Event Jedi if it does sprinkle and you can move the whole party easily under cover, even though you had to spend \$100 extra in site fees.

Once you have made a mental picture of your event and its flow, envisioned what could go wrong, and determined your plan of action should something unexpected occur, you can now create your event timeline and your weekly “to do” list.

## **2. Get organized.**

Even though I am not the tidiest person, my anal qualities come through in how I organize myself. I have a huge calendar above my desk with all my event timelines combined, a Palm Pilot for my contacts, and a calendar that goes to all meetings with me. Get organized — it will help.

Creating an event timeline will help you know who is completing which tasks by when.

As you can see from this timeline I know that I am getting the brochure text to the designer on April 8th and I know that it will take me a week to create that text, so I start working on it by April 1. Who needs to review the text? The executive director, the graphics committee? I will then forward the text to everyone who needs to see it with enough time for them to review it and let me know their feedback prior to April 6th (two days before to my actual deadline). People rarely do things without a hard-and-fast deadline. Stick to that deadline, but give some wiggle room for yourself!

People often ask me what the “tried and true deadlines”

# Timeline

ACTIVITY	PERSON RESPONSIBLE	FEBRUARY	MARCH	APRIL	MAY	JUNE
<b>Brochure</b>						
Copy developed	Coord.		March 23			
Copy proofed—session descriptions and timing, get confirmation from all faculty	Coord./Chairs/ Faculty		March 23–April 4			
Copy to Designer	Coord.			April 8		
Layout proofed	Coord., Chairs			X		
Designer to Printer	Designer			April 22		
Blueline proofed	Coord.			April 24		
Receive from printer	Printer			April 30		
Lists/invite to mail house	Printer				May 1	
Drop Date	Mailhouse				May 3	
<b>Program and Passport</b>						
Design options submitted	Designer	X		X		
Design options finalized	Marketing Chair			X		
Ad reservation deadline	Coord.			April 27		
Deadline for faculty info – bio, title	Coord.			April 27		
Faculty changes, committee member names – for program	Coord., Faculty			April 27		
Copy developed	Coord.			X		
Copy proofed	Coord.			X		
Copy to Designer	Coord.				May 22	
Layout proofed	Coord.				X	
Design to printer	Designer					June 12
Blueline proofed	Coord.					X
Shipped from printer	Printer					June 26
<b>Fax/E-mail blasts</b>						
Fax Blast	Coord.				May 20	June 10
E-mail Blast	Coord.				May 6	June 3, 17
<b>Registration Bags</b>						
Registration bags designed	Coord.				May 15	
Registration bags delivered	Coord.					June 26

are for sponsorships, invitations, and other printed materials. If I was planning a fundraising dinner for October 2, this would be my ideal timeline:

- Send sponsor packets, letters out . . . . . April – June
- Deadline to receive sponsor logos for the invitation (This deadline is mentioned in all the sponsor benefits and letter. Their names/ company logos will be listed in a sponsor insert that can be designed at the last minute.) . . . . . July 25
- Invitation text drafted . . . . . July 1
- Send text for review to committee, executive director (with a deadline of July 9th) . . . . . July 3
- Send invitation text to graphic designer . . . . . July 11
- Send draft one of invitation to committee, executive director for review . . . . . July 25
- Send draft two of invitation to committee, executive director for review . . . . . July 30
- Invitation to printer . . . . . August 1

- Invitation to mail house . . . . . August 15
- Invitation in the mail (for first-class mailing) (six weeks prior to the event) . . . . . August 21

This process will be repeated three times for a single event: for the save-the-date notice (which should be mailed 12 weeks prior to your event), the invitation, and the event program.

Timelines can be organized by type of task or date. Whatever works for you is fine, but do create an event timeline.

Review your timeline weekly. Print the timeline out and post it on your wall so you see it every day. Or write your timeline out on large wall calendars that you can hang above your desk. Write the deadlines in your personal calendar. Constantly know where you stand so deadlines don't sneak up on you.

Each week I write a weekly to-do list, based on my timeline. Which client needs what by when? Is the item urgent? Highlight it so you know to do it first. When you are done with a task, cross it off with your Light Saber. At the end of each week, review your list to ensure that

# National Philanthropy Day 2002

## JOB DESCRIPTIONS FOR CHAIR

*NPD will be produced under the leadership of a chair and a vice-chair for the event in collaboration with event producers, supported by Steering Committee, a volunteer leadership committee, an awards committee, the Chapter's VP for Corporate and Foundation underwriting, the Chapter Board, and the chapter administrator.*

### **Chair responsibilities, with the assistance of the Event Producers:**

- Put together NPD Steering Committee from chapter members, colleagues, etc. to assist with event tasks.
- Assign responsibilities. Decide calendars of activities and deadlines.
- Put together the volunteer leadership committee.
- Organize meeting with SFBT and chapter underwriting chair. Early arrangement with the SFBT.
- Invite Honorary Chair. Oversee all communications with them, ending with final thanks.
- Organizing meeting with volunteer leadership committee.
- Recruit the awards committee leadership and members and ensure that the awards committee has a sound nomination and awards process.
- Working with the Chapter underwriting chair, look for lead (awards) sponsors @ \$10,000, \$5,000 (Sponsor Chair has primary responsibility).
- Write letters inviting host committee (table sponsors) to list in invitation (Sponsor Chair has primary responsibility).
- Manage solicitation of table sponsors (Sponsor Chair has primary responsibility).
- Confirm A/V content for the program: Presentation of video, slides content (Recognition of Honorees/Program Chair has primary responsibility).
- Invite Master of Ceremonies.
- Confirm choices for vendors: graphics, A/V, photography, etc. (Event Producers have primary responsibility).
- Set program content, sequence, and timing (Recognition of Honorees/Program Chair primary responsibility).
- Select menu and attend menu tasting (Event Producers have primary responsibility).
- Make welcoming remarks at event.
- Thank you notes as appropriate (Event Producers have primary responsibility).

everything is done. What do you need to focus on when you return to work on Monday? Rewrite your list with Monday's priorities highlighted. When Monday arrives and you are once again donning your Jedi robes, you can settle right in and know what you need to do.

While my weekly "to do" list is not the cleanest or prettiest document, it is an effective tool for me and that is the most important tip. Create an organizational system that works for you. The system could be Stephen Covey organizers, Palm Pilots, or some other organizer. Personally, I have to write everything down to remember it, so writing a list is my preferred system.

Create specific folders or assign parts of a binder for different parts of your event. Then be sure to use them! I generally have folders in these areas for each of my events:

- **Site:** hotel contract, audio-visual costs
- **Caterer:** bids from caterers, cost breakdowns
- **Materials:** invite, save-the-date, program

- **Marketing/PR:** Web site, press releases, etc.
- **Committee:** meeting notes and committee correspondence
- **Next year's event:** all feedback that you receive to help plan for next year's event
- **Budget:** receipts for items that I purchased
- **Sponsors:** sponsor levels, timelines and letters from sponsors

I also have a "tickler file" for each month of the year. If a committee member e-mails me and says "We should do this in January" or "Remind me of this after the event," I will print out the e-mail and put it in the January Folder or the folder for the month that follows the event. The first of every month I look through the folder. This then "tickles" my memory.

### **3. Create job descriptions.**

Job descriptions are essential to any event. As an anal event planner, I write job descriptions for the committee chairs, coordinator, committee members, and even the day-of volunteers. People are much more effective and willing to complete tasks when they know all the

elements of that task or job. As you can see from the job description at left for chair, the job is clearly laid out.

As the event coordinator, you will be much more effective if you know who will be completing which task. You can then focus on completing your responsibilities.

Be sure to give your day-of volunteers their job descriptions prior to the event. On the day of the event, it's impossible for me to walk each volunteer through his or her responsibilities. E-mailing them their job description prior to the event is essential.

When volunteers arrive, your volunteer coordinator can hand them their job description, remind them of their responsibilities, and get them to their correct location. They are then educated and ready to help you pull off the event. My biggest pet peeve when I am an event volunteer is to arrive and be told that they have nothing for me to do. Find something for all your volunteers to do. Normally, on the day of the event, I start a task and then hand it off to a volunteer, showing them what I am doing. Then I start the

next task on my list and in turn, hand that one off to the next volunteer.

What do you do if chairs/committee members or volunteers don't follow through on their job responsibilities? Reference your organizational chart. If a committee member is not fulfilling their commitment, have their peer, the event chair, check in with them. If your committee chair seems to have flown the coop, enlist the support of the agency's executive director or board chair. Has your entire committee gone on vacation? Re-evaluate whether or not you should be hosting this event. Are your day-of volunteers not being as gracious to your guests as they could be? Reassign them to another task, telling them that you've noticed that their skills would be much better utilized helping with the centerpieces.

#### 4. Get ready for countdown: The two days before the event

By now you've gone through months of preparation (I suggest at least ten months if this is a large-scale event, two to three months for a house party). You feel the Jedi force flowing freely through you and you are completing the tasks on your to-do list at warp speed.

Here are some tips to help you:

- **Create a minute-by-minute breakdown of the event.** I call this the play-by-play. Include who is responsible for which part of the event. For instance, what time is the caterer coming and who will be showing them where the kitchen is? This play-by-play breakdown of the event is easily distributable to event volunteers, other staff members, and your event chair(s).

- **Delegate all the activities so that there is nothing for you to do the day of the event.** Your job is to troubleshoot and you need to be free of responsibilities to do so capably.

- **Once you have created your play-by-play, walk through it with fellow staff members or other valuable members of your event team.** Download all the information about the event into their capable hands. They need to be just as knowledgeable as you on the day of the event. This prevents you from having to answer every question at the event. You will be far too busy to do so.

- **Compile the final draft of your event registration list the evening before your event.** I have found putting this on an Excel spreadsheet to work extremely well. You can sort it by attendee's last name or by the attendee's table name.

- **Be sure to put together a box of event supplies.** I call this the "Event Box" and it usually contains the following:

- Different types of tape: masking, Scotch, duct, and double-sided poster
- Pens for registration
- Larger markers
- Arrow signs to direct traffic
- A stack of blank paper (just trust me)

- Envelopes: manila and size 10
- Scissors: at least two pairs
- Stapler
- String
- Your Rolodex
- Cell phone
- Two-way radios (If the location of the event is large, radios save time by alleviating the need to sprint across large event venues. If you are having an event at a hotel, order an extra radio for your banquet staff representative. Don't forget the batteries/chargers for the radios.)
- Multiple copies of any registration lists: if you have different types of registration lists, photocopy them on different colored paper. These should always be single sided.
- Table tent signs, if needed
- Extra name tags, if applicable
- Copies of your play-by-play

Be sure to tell your event team about the event box and what is in it.

- **Now take a deep breath and call every vendor, individual, or company that is bringing an essential item to your event.** Confirm that they will be there at the arranged time bringing the arranged item. Afraid you are coming off as being anal? Don't worry; this is merely the way of an Event Jedi.

#### 5. Day of the event.

Give yourself plenty of time.

Always lay your nametags out by last name alphabetically, laid out left to right, top to bottom, on at least three registration tables. If you have assigned your guests to sit at a specific table, write it on the back of their nametag. Have guests find their own nametags. Having one or two volunteers sorting through all of the nametags will create a huge bottleneck.

Remember that there is an invisible curtain between you and your guests. Whatever chaos is actually occurring behind the scenes should not be visible to them in any way. If you must, bust out the ol' Jedi Mind Trick: "Everything is fine."

The perfect example of this "invisible curtain" comes from a dinner I organized years ago. I was standing in the back of the room listening to the heartbreaking testimony of children describing how this specific agency had enriched their lives. I leaned against a table that had votive candles sitting on it. Within seconds my long scarf that I had so casually thrown over my shoulder burst into flame. After thinking "Stop, drop and roll," I quickly patted it out and quietly removed myself from the room to make sure all was okay — and I was. Unfortunately, the worst was

---

yet to come. The silent fire alarms had detected the fire and had called the fire department. The entire squad came screaming to a stop right in front of my venue and came charging up the stairs. I met them saying “It’s okay, I was on fire, but it’s out now.” I showed the fire fighters my charred scarf as proof and then described the situation. Thankfully, they left a lot more quietly than they had arrived.

Did my guests know that I had been on fire and the fire department had paid us a visit? Not for a second. What did I learn? Not to wear long scarves at events and to stay calm in the midst of an emergency.

Always remember that you are the anxiety gauge for the event. As the leader, you need to remain calm, in control, and ready to deal with any problem.

## **6. The last tip: You are human.**

As an anal individual, I have a hard time remembering that I am human. Despite how much I hate to admit it, I am not perfect. I will forget things. You will forget things. Your committee members and volunteers will forget things. This is what makes events so much...um...fun because there will be forgotten items or incidents that you did not expect when you envisioned the event months ago. The rush of successfully dealing with those unexpected occurrences, like catching on fire, is exactly why I love event planning.

Good luck and may the event Force be with you. **GF**

---

ALI VOGT IS A NONPROFIT EVENT PRODUCER AND CONSULTANT IN THE SAN FRANCISCO BAY AREA. YOU CAN REACH HER AT 510/527-1918 OR AT ALIVOGT@NOTHINGBUTNET.NET.