

Project Management

Tools for Running a Successful Event

Leadership Training: Learn Today, Lead Tomorrow



Project Management: Tools for Running a Successful Event

You might not realize it, but you are currently managing multiple projects at once. School assignments, sports teams, extracurriculars and budgeting your weekly allowance all require you to use your project management skills. It's important to understand that each project, task or event you work on will be different, but this module is designed to help you plan a successful event, whether it's your first or your tenth!

Adapted from the Project Management Institute, the five phases of the project management cycle are: **initiate**, **plan**, **budget**, **mobilize** and **reflect**. Following this cycle will help you reduce risks, cut costs and contribute to the success of your event.

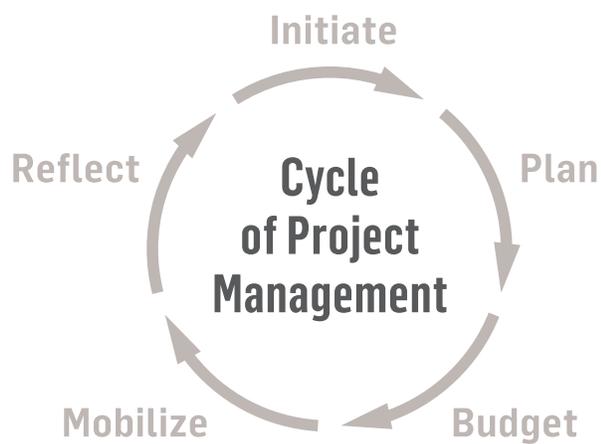


Table of Contents

Why does this matter? 4

Learn why project management skills are essential for success now and in the future.

Activity #1

Project Initiation and Planning 6

Passion + Issue = Change! In this section, discover what your purpose is for running the event and how you can have the greatest impact.

Activity #2

The Art of Budgeting for an Event 11

Time to consider your costs! In this section, learn how to create a budget that will ensure you have, or can generate, enough money to cover all the expenses for your event.

Activity #3

Build Your Dream Event-Planning Team 15

Now it's time to mobilize! In this section, learn how to create a network of mentors, supporters and volunteers to help you execute a successful event.

Activity #4

Reflect and Establish Your Legacy 19

Reflection is an important part of the process. In the final section, discover how taking time to reflect on your event can help you and your team plan for the future and consider what the legacy of your event might be.

Why does this matter?

The Value of Project Management

- A survey by consulting giant McKinsey & Co. found that nearly 60 percent of senior executives said building strong project management skills is one of their top priorities.
- Project Management practices have become more important since the recession began in 2007—in an economic crisis it's important to use strategies that help reduce risks and cut costs.

Source: The Project Management Institute www.pmi.org

In this module you will build:



A focused skill set

Learn how to develop project management skills through a cycle of initiating, planning, budgeting, mobilizing and reflecting.



Knowledge and understanding

Explore the "why" behind these skills, how they can be applied now and in the future.



Attitudes/habits of mind

Develop an understanding of how to organize yourself and work with others to execute a project or event successfully.



Innovative thinking and acting

Learn how to put your project management skills into action to contribute to positive social change.

Did you know?

Project management skills can be used for more than just planning events. They are transferrable skills that can be applied in the workplace and everyday life.

2018 Conference Board of Canada's Employability Skills

"Manage Information" and "Use Numbers" are listed among the top three fundamental skills needed for further development. These are all essential to the project management cycle:

- Locate, gather and organize information using appropriate technology and information systems
- Access, analyze and apply knowledge and skills from various disciplines (e.g., the arts, languages, science, technology, mathematics, social sciences and the humanities)
- Decide what needs to be measured or calculated
- Observe and record data using appropriate methods, tools and technology
- Make estimates and verify calculations

In addition, teamwork skills: participate in projects and tasks

- Plan, design or carry out a project or task from start to finish with well-defined objectives and outcomes
- Develop a plan, seek feedback, test, revise and implement
- Work to agreed-upon quality standards and specifications
- Select and use appropriate tools and technology for a task or project
- Adapt to changing requirements and information
- Continuously monitor the success of a project or task and identify ways to improve

Source: <https://sustainabledevelopment.un.org/?menu=1300>

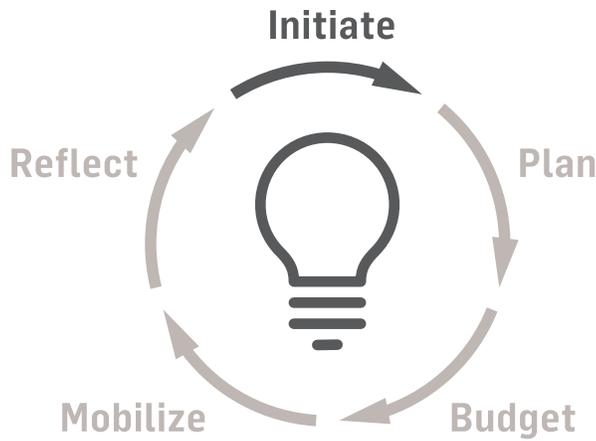
A special thank you to KPMG in Canada for supporting the next generation of young leaders.

KPMG is passionate about empowering youth with the leadership skills they need to be successful and take action. By providing tools and resources for young people to develop the key skills needed for their success in school and in their community, KPMG and WE are helping to create lifelong learners and the leaders of tomorrow.



Activity #1:

Project Initiation and Planning



Key Terms

Event: A planned public or social occasion

Fundraiser: An event held to generate financial or material support for a charity or other enterprise

Impact: A significant or major effect

Issue: An important topic or problem

Stakeholder: One who is involved in or affected by a course of action

Before you start planning and executing your event, it's important to identify what type of event you will be running, why you want to run it and what impact you hope the event will have in your community. This is called the **Initiation Phase**.

The first step is to determine why you want to run the event. Use the following questions to explore your "why".

• Is it to fundraise for a cause? If yes, what will you fundraise for?

• Is it to raise awareness for a cause? If yes, what cause?

• Is it to support a campaign? If yes, what campaign?

• Is there another reason? If so, describe:

To better support your decision-making, determine who you hope will benefit from this event. These people are called **stakeholders**.

- _____
- _____
- _____

Do you already have some ideas for the type of event you would like to run? List them below:

- _____
- _____
- _____

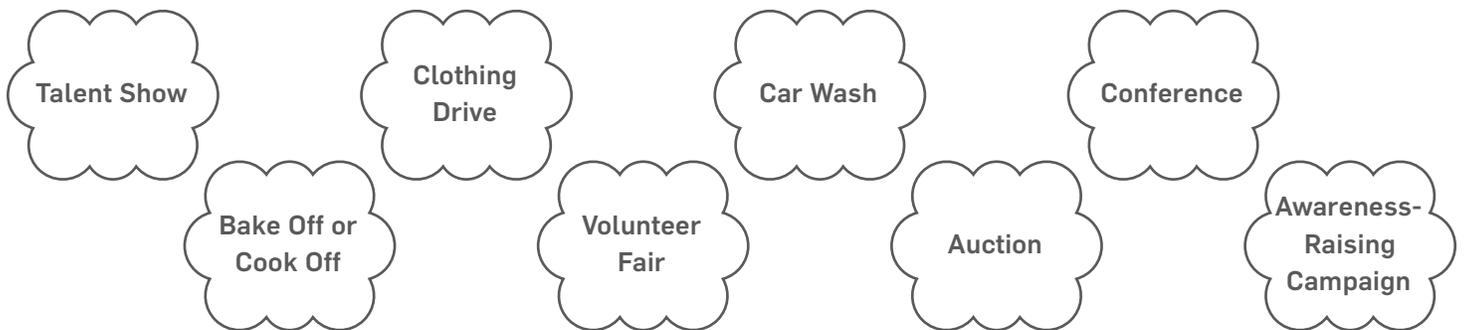
To help you determine how you can best use your talents and skills to run a successful event and have the greatest impact, use this simple yet powerful formula of social change: **Passion + Issue = Change**.

Try this!

Use the chart below to brainstorm how you can combine your passion with the issue you care most about to host an event that will contribute to positive change.

Passion + Issue = Change		
Passion	Issue	Change
How do you enjoy spending your time?	What issue are you most passionate about?	How will you make your impact?
<i>E.g., Dancing</i>	<i>E.g., Food security</i>	<i>E.g., Host a dance to raise money for the food bank in your local community.</i>

Still need more inspiration? Here are some ideas for great events:



Great! Once you've determined the type of event you're going to run, why you are going to run it and who/what it will impact, you will need to choose your date and location. Use the chart below to stay organized:

Type of Event	Your Why	Who Will It Impact?	Date	Location
<i>E.g., Dance Fundraiser</i>	<i>E.g., I want to raise money and awareness for the food bank in my community.</i>	<i>E.g., People in my community who access the food bank.</i>	<i>E.g., February 14th</i>	<i>E.g., School gymnasium</i>

Before you proceed to the next phase, take some time to do a **SWOT analysis** to identify any potential risks and minimize any problems you may experience when running your event.

Try this!

SWOT Analysis	
<p>Strengths What do you do well? What skills or knowledge do you already have?</p>	<p>Weaknesses What do you need to improve? What will you need help with?</p>
<p>Opportunities What are your goals?</p>	<p>Threats What obstacles or barriers will you face?</p>

Now it's time to start planning the details of your event. Identifying clear goals and creating a schedule will help you to stay organized. This is called the **Planning Phase**.



First, it's important to identify the goal or goals of your event. Look back to your reasons for running the event for inspiration when defining your goals. To make sure you are setting yourself up for success, make sure to set goals that are SMART: Specific, Measurable, Attainable, Relevant and Time-bound. Consider the following questions when setting your goals:

Specific:

What do you want to do?

Measurable:

How will you know when you've achieved your goal?

Attainable:

Are you able to achieve this goal?

Relevant:

Is the goal appropriate for the context?

Time-bound:

When do you need to accomplish this goal?

Here is an example of a SMART and a non-SMART goal. Take time to consider the differences between them using the information above:

Non-SMART Goal: To make sure no one in my community experiences hunger.

SMART Goal: To raise \$500 to donate to my local food bank by the end of February 2019.

Goal(s) for My Event	
• _____	
• _____	

Another important step in the planning process is to decide how you will measure the success of your event. For each goal you outlined above, determine what criteria you will use to measure your success:

Passion + Issue = Change	
Goal	Success Criteria
• _____	• _____
	• _____
	• _____
• _____	• _____
	• _____
	• _____

The next step to the planning phase is to create a schedule for the time leading up to your event. Begin from the date of your event and work backwards. It can help to divide your timeline into sections or chunks to determine what needs to be done now and what can be done later.

Planning My Event	
Section/Chunk #1 <i>E.g., three months in advance</i>	
Task	Date
<i>E.g., Book the venue</i>	

Section/Chunk #2 <i>E.g., one month in advance</i>	
Task	Date
<i>E.g., Advertise the event at school and on social media</i>	
Section/Chunk #3 <i>E.g., two weeks in advance</i>	
Task	Date
<i>E.g., Sell tickets to the event</i>	
Host My Event!	

Return to your Planning My Event schedule and add two or three moments to review your success criteria and make sure you're on track to reach your goal. It's also important to frequently refer to your SWOT analysis to troubleshoot any possible obstacles or barriers.

Now it's time to implement your plan and start executing your event! Use this checklist below to guide you through the process and make sure that you are putting everything that you have learned into practice.

Event Implementation Checklist

Preparation

- Identify event type and purpose
- Conduct a SWOT analysis
- Set SMART Goals and define success criteria
- Create a schedule
- _____

Budget

- Identify costs
- Create event budget

Team

- Recruit team members and volunteers
- Contact speaker or performer (if applicable)
- _____

Venue and Equipment

- Organize/rent venue
- Organize food/beverages
- Organize/rent tables/chairs
- Organize/rent av equipment
- _____

Communication

- Create flyers, posters, radio advertisements, etc.
- Design website (if applicable)
- Buy stickers, T-shirts, name tags, etc.
- _____

Decorations

- Flowers
- Balloons
- Lighting
- _____

Miscellaneous (anything not included in the list above)

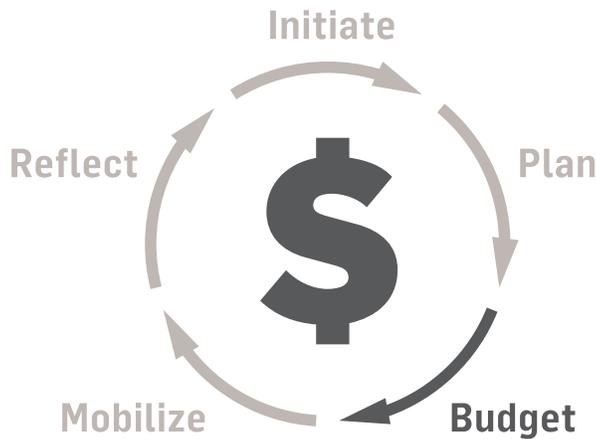
- Buy stationery supplies
- _____
- _____
- _____

Activity #2:

The Art of Budgeting for an Event



Watch **Leadership Training Project Management Video #1** before you begin this activity.



Key Terms

Budget: An estimate of expected income and expense for a given period in the future.

Donation: A gift given to a charity, such as money or goods.

Emergency fund or “rainy day” fund: Money set aside for emergencies or unexpected expenses.

Expense: Cost or charge.

In-kind contribution: Things that are donated or loaned to you to help run your event and meet your budget.

Income: Money received during a specific period as wages, interest, etc.

Quote: An estimated price for goods or services.

Now that you have a plan in action for your event, the next step is to build a budget. A budget is a financial plan that estimates how much money you will need to spend to run your event and determines how much money you will need to save.

What Do You Need to Run Your Event?

Consider this: Before starting to build your budget, you need to determine the resources you will need to run your event. A good budget needs to be as specific as possible, including resources, quantities and costs.

Try this!

Use the Budget Planning Checklist below to determine what resources you will need to run your event that may have costs associated with them.

Budget Planning Checklist

Venue and Equipment Costs

- Venue rental
- Food/Beverages
- Table(s) and chair(s) rental
- AV equipment
- _____

Communications Costs

- Advertising/Promotion (e.g., flyers, posters, radio advertisements, etc.)
- Website design and development
- Logos, stickers, T-shirts
- Name tags
- _____

Team Costs

- Food and transportation allowances
- Training
- Speaker or performer fees
- _____

Decoration Costs

- Flowers
- Balloons
- Lighting
- _____

Miscellaneous (anything not included in the list above)

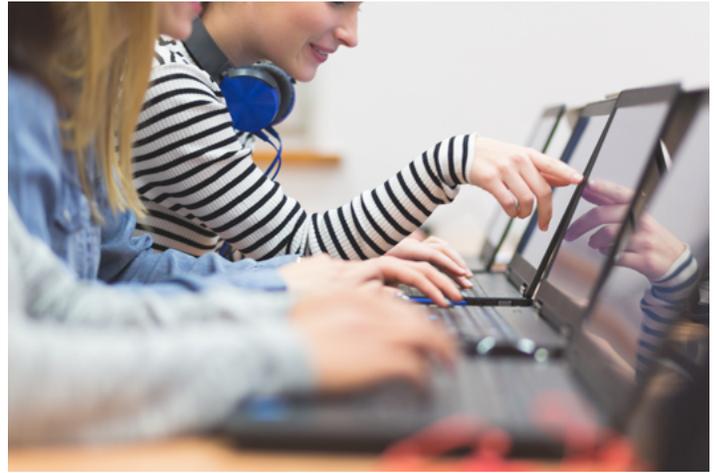
- Stationery supplies
- _____
- _____
- _____

Consider Your Costs

In order to accurately estimate the costs for your event, you can research store prices online, ask people who have more experience or try looking at budgets of similar projects. Also, keep in mind that it is important to know what unit you will be using to estimate your costs—are your costs per hour, per event, per person? Try to be consistent and specific as you begin to track your expenses.

Try this!

Now that you have identified your resources, use the Tracking Event Expenses form below to start tracking your expenses.



Tracking Event Expenses				
Item	Description	Quantity Needed	Estimated Cost	Actual Cost
<i>E.g., Table rental</i>	<i>Rectangle 8' x 30"</i>	4	<i>\$11.50/table + tax</i>	<i>\$51.98</i>
Total:				

If you are considering running this event as a fundraiser for a cause or charity that is important to you, determine what your fundraising goal will be and make sure to include it as part of your expenses!

Fundraising Goal \$ _____

Where Will Your Money Come From?

Once you have identified the resources you will need to run your event it's time to consider the income you have or plan to earn to cover your expenses. Income refers to the money you receive over a specific period from wages or other sources.

1. List your current source(s) of income (e.g., personal savings, wages from a part-time job).

2. How else could you generate income for your event (e.g., hosting a bake sale, selling tickets to your event, asking for donations)?

Don't forget that you may be able to reach out to your friends and family to help cover or waive your costs through in-kind contributions. For example, you could connect with your school principal and arrange to host your event at the school's gymnasium at no cost! In Activity #3 you will learn how to mobilize those around you and explore where in-kind contributions can help you save money.

Sources of Income				
Item/Source	Description	Estimated Income	Actual Income	Notes
<i>E.g., Ticket sales</i>	<i>\$5.00/ticket</i>	<i>\$150.00</i>	<i>\$150.00</i>	<i>Estimated income based on 30 participants at the event.</i>
Total:				

To make sure your event is a success, it's important to have a balanced budget. This means you should have, or be able to earn, enough income to cover all your expenses. Check out the tips below to help you make sure you keep your budget balanced.

Six Tips to Keep in Mind for Developing Your Event Budget

1. Start preparing your budget from the start

Do not procrastinate when creating your budget. It may seem like a big task, but we've broken it down step-by-step to make it easy for you! It's an important first step in your event-planning journey and sets you up for success.

2. Don't guess!

It is recommended that you get at least two or more **quotes** for each item in your budget to make sure you are making an accurate estimate and getting value for your money.

3. Prepare for a "rainy day"

It is normal for your budget to change once you start executing your event, which is why it's important that you include a fund for a "rainy day" expense. Think about the absolute worst things that could happen and plan accordingly. TIP: Only use your rainy day fund for emergencies. Don't use it to splurge on something else.

4. Don't forget in-kind contributions

Identify the things that can be given, loaned or exchanged to help you run your event, such as the free use of a venue (e.g., school gymnasium).

5. Double-check everything

Get someone on your team or someone you trust to review your budget and ensure that you didn't miss anything.

6. Monitor your budget

It's crucial to monitor and adapt your budget as needed. Make sure you have enough money for all the identified tasks. With that said, every time you make a purchase or receive income, keep a record of it.

Reflection:

Is your budget realistic? Explain:

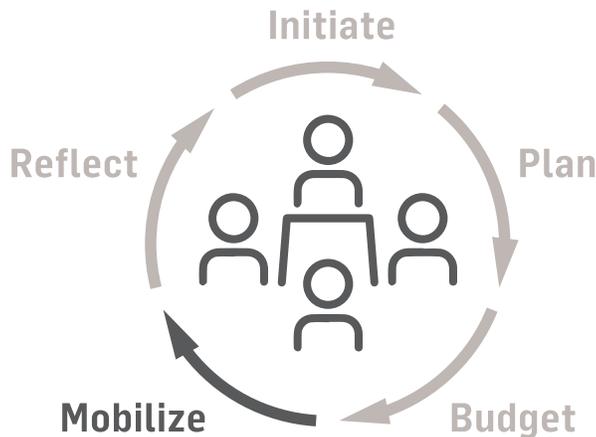
Do you foresee any hidden expenses? Explain:

Activity #3:

Build Your Dream Event-Planning Team



Watch [Leadership Training Project Management Video #2](#) before you begin this activity.



Key Terms

Mentor: A trusted counselor or guide.

Mentee: A person who is advised, trained or counseled by a mentor.

Supporter: A person who is actively interested in and approves of a person, organization or initiative.

Volunteer: A person who freely offers to take part in an enterprise or undertake a task.

Now that you have a plan for your event and you've finalized your budget, the next step on your project management journey is to mobilize and build a network of people. You've heard the saying "two heads are better than one," so don't think you have to do this on your own. In other words, it's time to practice your communication skills and build your dream event-planning team!

A good place to start is finding a **mentor**—someone who will share their knowledge and experience, and give you guidance on how to successfully run your event.

Here are five steps to finding the right mentor for you:

1. Do a self-assessment:

Use the organizer below to determine your strengths and what skills you need to develop in order to successfully execute your event. This will support you in finding the right mentor for the skill or skills you wish to develop.

My Strengths
• E.g., I have strong organizational skills.
•
•
•
•
•
•

Skills I Need to Develop
• E.g., I need to develop my ability to multitask.
•
•
•
•
•
•

2. Identify potential mentors:

Consider the people you spend time with and identify folks that have the skills you listed in the "Skills I Need to Develop" section. They could be a colleague or your boss (from your part-time or volunteer job), a teacher, a teammate, a classmate, a friend or a family member. It's common to think that your mentor needs to be older than you, but you just need a mentor who has a skill you want to learn.

Try this!

List the skills you want to develop and then create a list of potential mentors you know who have these skills.

Skills I Need to Develop	Potential Mentors
<i>E.g., Public speaking skills</i>	<i>E.g., Mrs. Allan (English teacher)</i>

3. Make the “ask”:

When you're ready to reach out to your potential mentors, you can contact them by phone, email or in person. Remember to be clear about what you're asking—let them know you're organizing an event and that you want them to be your mentor!

Consider using the template below when you make your request:

Dear [Insert Name],

I am hosting an event on [Insert Date] for [Insert Theme/Type of Event]. I have identified that I need support with developing the following skill: [List Skill]. I admire your expertise in [List Skill]—can you please be my mentor and guide me in acquiring this skill?

I look forward to hearing from you.

Sincerely,

[Insert your Name]

4. Schedule a meeting and set goals:

Once you have found your mentor(s), schedule a meeting and use the chart below to define your short and long-term goals.

Short-Term Goals (Next 3 months)	Long-Term Goals (Next 6–12 months)
<ul style="list-style-type: none">•••	<ul style="list-style-type: none">•••



The first meeting with your mentor(s) is a great time to review your goals. While you might face some obstacles as you work toward your personal goals, you can set yourself up for success by setting goals that are SMART: Specific, Measurable, Attainable, Relevant and Time-bound. It's a memory device used by athletes, business executives, health professionals and many others. Consider the following questions when setting your goals:

Specific:

What do you want to do?

Measurable:

How will you know when you've achieved your goal?

Attainable:

Are you able to achieve this goal?

Relevant:

Is the goal appropriate for the context?

Time-bound:

When do you need to accomplish this goal?

5. Evaluate your mentorship relationship:

As you work toward your goal(s), you and your mentor should set aside times to analyze your relationship, identify what you've achieved and discuss the goals you are still working toward.

Try this!

What progress has been made toward your goal(s)?

Has the original timeline shifted? Yes or No (circle one). Why or why not?

What challenges are you currently experiencing? What is your plan for addressing them?

What are your objectives for next mentoring session?

Now that you have your mentor(s), the next step is to build your team!

Here are five steps to building your team and setting it up for success:

1. Choose the right people:

Make an announcement in your classes, tell your friends or host an information session to let people know you're seeking volunteers to support your event. Make sure to let them know what your expectations are.

How many hours a week do they need to meet with the team? _____

2. Host your first meeting and try a team-building activity:

The first meeting should focus on uncovering the knowledge and skills everyone brings to the team, in order to assign them the right role.

Try this!

i. On a board or a large piece of paper, draw the following symbols and explain to your team what each of them mean:

 Identify subjects you are knowledgeable about (music, math, fundraising, etc.)	 Identify things that you are passionate about (social justice, family, art, etc.)	 Identify your skills (building, cooking, cleaning, drawing, etc.).
--	---	--

ii. Ask each team member to think of three things they can contribute to the event with their Heads, Hearts and Hands.

iii. Pass around sticky notes, have each team member write down their contributions and stick them on a board or paper.

iv. Review the chart as a team and determine any gaps.

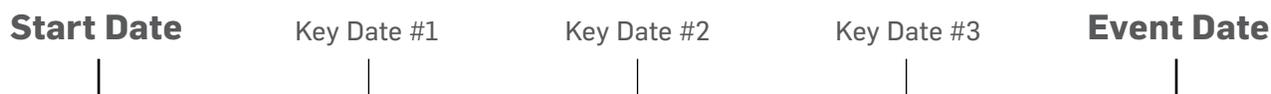
3. Define roles and assign them:

Now that you know your team members' strengths, you can determine who is going to be responsible for each role:

Name	Roles	Deadline	Notes
<i>E.g., Jane</i>	<i>Treasurer</i>	<i>Ongoing</i>	<i>Jane will be responsible for tracking our budget.</i>

4. Make a timeline with your team:

It is important that the entire team is aware of the key event dates and deadlines. Return to your Planning My Event schedule from Activity #1 and determine the deadlines by creating a timeline:



Don't forget to include the following items in your timeline:

- Weekly team meetings
- Book and confirm your venue
- Book and confirm your speakers or special guests (if applicable)
- Create posters, announcements or other advertisements
- Create and send out invitations

5. Continue building a relationship with your team and have fun!

Not every meeting has to be about business. Make sure that you leave time to have some fun!

The last step in mobilizing your event team is to build your list of **supporters**. These will be the people who can provide you with in-kind contributions, donations or services. In Activity #2: The Art of Budgeting for an Event you identified a list of resources that you will need to run your event. From that list, consider who may be able to offer them to you in-kind.

Try this!

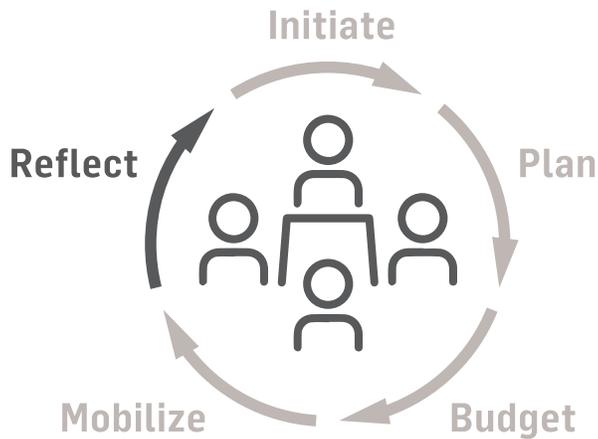
Item	Category	Supporter	Contacted	Notes
<i>E.g., Gym</i>	<i>Venue</i>	<i>Principal</i>	<i>In-person</i>	<i>The gym can be used as a venue as long as the event is on a school night between 3:30 p.m. and 7:00 p.m.</i>

Activity #4:

Reflect and Establish Your Legacy



Watch [Leadership Training Project Management Video #3](#) before you begin this activity.



Try this!

Your Post-Program Checklist

- Send thank-you notes or emails to:
 - Your team members
 - Your supporters
 - Your donors
 - Your guests
- Host a post-event meeting/celebration with your team to discuss the successes and challenges of your event
- Review your budget and finalize any outstanding payments or invoices
- Ask attendees to share photos from your event with you and post them on social media

Congratulations, you just hosted your first event! Is “When do we run the next event?” the first thing you think of when you look at your team? Well then, you’ve caught the event-throwing bug! Before you start planning the next one, it’s important you take the time to reflect on the impact of your event, consider what the legacy of your event might be and work through the Post-Program Checklist.

Once you officially wrap up the event, take some time to reflect. This will help you in continuing to develop your skills and to consider what you want the legacy of your event to be.



Try this!

First, bring your team together and encourage them to use the following questions to reflect individually on the event. If your team members feel comfortable, take time to share responses.

List three successes of the event:

- _____
- _____
- _____

List three things you could have done to improve the event:

- _____
- _____
- _____

List three things that surprised you the most while planning this event:

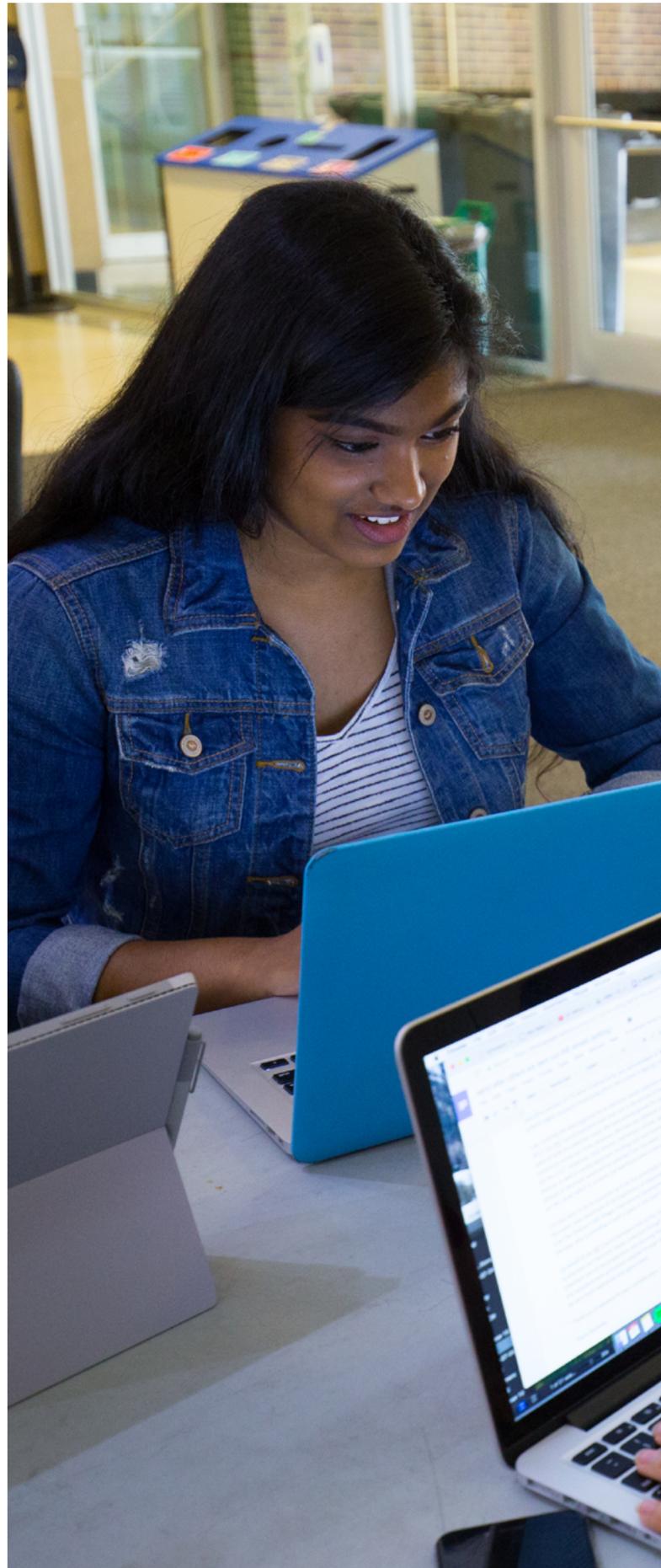
- _____
- _____
- _____

List three ways you contributed to the team:

- _____
- _____
- _____

Then, facilitate a team discussion using the following activity:

- i. Write the following questions on a board or a piece of chart paper.
 - What does leaving a legacy mean to you?
 - Who or what do you want to impact with your next event?
 - How do you want to contribute to change in your local and global community?
- ii. Give each team member three sticky notes and ask them to record their answers and post them under each question.
- iii. Review each team member's answers and discuss the possibilities for future events!







WE.org
@WEmovement