

## **Backwards Planning - Monterey County 4-H events**

### **What is Backwards Planning?**

Backwards planning is an effective time management tool that will help you create a set of instructions and a production timeline for your committee. By planning backwards, it is easier to confirm that every component, down to the smallest detail, has been accomplished.

### **How Do I Start Backwards Planning?**

With backwards planning, you begin by defining the end result of a complex task (e.g., holding a BBQ). Then, working backwards to the beginning, you record every simple task required to achieve the end result on the Event Planning Calendar. Consequently, you develop a realistic timeline and a set of detailed instructions for success.

### **Steps to Successful Backwards Planning:**

Make a list of everything that needs to be completed. The list should include:

Printed materials	Publicity Materials
Refreshments	Facility Reservations
Equipment Rentals	Permits
Sign up sheets for volunteers	Budget
Jobs to fill	Shopping
Dates: planning meetings and event	Priorities list by committee
Information given to Club Officers	Information give to Club Leaders
Goal of event or activity	Wrap up plans

Assign due dates to these tasks. For example, if a room reservation or insurance use agreement form requires 3 weeks for approval, and must be completed and approved 1 week prior to your event, you will need to assign a due date that is at least 4 weeks before your event.

Using an event planning calendar, start with the last task on your list to be completed before the event. Enter it under the appropriate date on the calendar and consider any smaller components of the task that need to be completed as well.

If there are components of this task, work backwards with them and plot them on the calendar. For example, if your task is handing out flyers to promote your event, you will first need to make enough copies of the flyer for distribution. So, "Take Flyer to Copy Center" would be a prior task that you need to record on your planning calendar. To accomplish that task, you would first need to determine the design and text of the flyer, and so on.

Proceed with the next task to be completed until all tasks are listed on the event planning calendar.

#### 4-H Event Guide

Use this guide to determine what will need to do in order to have a successful committee/event at the first planning meeting. Please remember that some of these items may not apply to your committee/event.

##### MAKE EARLY PLANS

*Start your planning 2-3 months in advance*

<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Determine event goals		
	Project a target audience		
	Receive approval for fundraising (if necessary)		
	Reserve a facility/venue that fits your event's needs (moveable chairs, A/V equipment, stage, capacity)		
	Ensure adequate volunteers to plan and carry-out event		
	Determine publicity materials		
	Select possible dates		
	Meet with 4-H YDP staff to ensure that all the proper forms are filled out prior to your event (insurance use agreements, room reservations)		

**SECURE FUNDING**

*It's difficult to raise funds, so start early. Remember that you cannot commit funds before you have them*

<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Prepare a detailed and realistic budget that projects all anticipated income and expenses related to the event.		
	Check deadlines for identified funding sources.		
	Work with funding organizations (Council) to ensure that you are using the given money appropriately.		

**MAKE ARRANGEMENTS**

*Use these checklists to arrange for all needs well in advance. Try to delegate tasks to members so that your committee works as a whole to ensure success.*

Equipment Needs			
<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Venue		
	Lectern		
	Stage/Platform		
	Trash Cans		
	Cash Box		
	Parking Permits		
	Tables		
	Chairs		
	Head Table		
	Coat Rack		
	Barricades		
	Fire Extinguisher		
	Electrical Outlets		
	Portable Toilets		
	Tent/Tarp		
	Food/Beverage Service (catering)		
	LCD Projector		
	Microphone/Speaker		

	DVD Player		
	Sound System (Cd/Music player)		
	Laptop		
	Camera		
	Screen		

<b>Supply Needs</b>			
<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Maps (for directions)		
	Directional Signs		
	Posters		
	Cash Box/Change		
	Trash Bags		
	Name Tags		
	Tickets		
	Markers		
	Printed Programs		
	Flipcharts		
	Paper		
	Pins/Tacks		
	Stapler		
	Staples		

	Pens		
	Pencils		
	Tape		
	Decorations		
	Tablecloths/Linens		
	Food		
	Beverage Containers		
	Plates		
	Water		
	Napkins		
	Food Utensils		

<b>Event Arrangements</b>			
<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Disability access		
	Catering and/or Concessions (food permits?)		
	Recycling		
	Event Insurance		
	Security		
	Clean-up		
	Parking and Transportation		

**PUBLICIZING YOUR EVENT**

*Develop your target audience, budget and detailed publicity plan early to ensure your event is successful! Make sure to share with your Club Leader **prior** to using media.*

<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Flyer/Poster		
	Website		
	Email county members thru county offices		
	Press release to the		
	Banners out in the community (Permit may be Required)		
	Special invitations		
	Announcements in meetings, etc.		
	Distribution Plan		

**COMPLETING THE PROCESS**

<i>Completion Date</i>	<i>Task</i>	<i>By Who</i>	<i>Notes</i>
	Obtain feedback on the event		
	Pay all bills		
	Develop transition binder for your successor with timeline, estimated and actual budgets, sample publicity, program, receipts and all correspondence		
	Send thank you notes		
	Promptly negotiate and document any areas of concern		
	Complete evaluation form		

**END OF EVENT REPORT FOR 4-H EVENTS**INPUTS: (resources)

Club in Charge: \_\_\_\_\_

Adult Chairs: \_\_\_\_\_

Youth Chairs: \_\_\_\_\_

Name of event: \_\_\_\_\_ Date \_\_\_\_\_

Time \_\_\_\_\_ Location \_\_\_\_\_

Money budgeted \_\_\_\_\_ Actual money spent (with receipts) \_\_\_\_\_

Fees charged \_\_\_\_\_ *Add a separate additional page listing all itemization*

Donations \_\_\_\_\_ \$ amount \_\_\_\_\_ for what \_\_\_\_\_

From whom? \_\_\_\_\_ have they been thanked? \_\_\_\_\_

*Add a separate additional page listing all donations*OUTPUTS: (results)

Chairman's name \_\_\_\_\_ Club \_\_\_\_\_

Number of members in attendance \_\_\_\_\_ number of volunteers in attendance \_\_\_\_\_

Was this a chaperoned event? If so, number of chaperones \_\_\_\_\_ Ratio \_\_\_\_\_

List or attach additional support materials that identify the following:

Budget

Menus

Items made

Schedule

Scholarships Offered

Names and contacts of special guests

Special staff (Nurses, lifeguards, cooks, etc.)

OUTCOMES: (Impacts)

Identify the "so what" or measureable changes in clientele around the following outcome areas:

Learning Outcomes (awareness, knowledge, attitudes, skills, opinions, aspirations, motivations)

Action Outcomes (behavior, practice, decision making, policies, social action)

Condition Outcomes (social, economic, civic, environmental)