



THE SUMMIT STREAM STARTER KIT

Six guides to get your next event or project started

Checklists and templates from Sarah Cowles, founder of Summit Stream Solutions, an Orlando event and project management studio.

Event Management

- The 12-Week Event Planning Countdown
- Gala Run-of-Show Template

Project Management

- Project Kickoff Checklist
- Event Budget Starter

Systems & Operations

- Sponsor & Vendor Tracker Starter
- The Donor Follow-Up Playbook

Questions or want help putting these to work? Email sarah@summitstreamsolutions.com.

Event Management

Plan, run and follow up on events of any size.

The 12-Week Event Planning Countdown

Weeks 12–9: Foundation

- Set the goal: dollars raised, guests, or awareness. Write it down.
- Lock the date, venue and a working budget with a 10% contingency line.
- Name one decision-maker and one point person for vendors.
- Start the sponsor list and send the first asks.

Weeks 8–5: Build

- Book catering, AV, rentals, photographer and entertainment. Get every quote in writing.
- Send save-the-dates and open registration or ticketing.
- Draft the program: speakers, awards, auction, appeal.
- Create one shared tracker for tasks, owners and due dates.

Weeks 4–2: Confirm

- Confirm every vendor: arrival times, contacts, load-in details.
- Finalize the run-of-show, seating chart and volunteer roles.
- Collect sponsor logos and recognition details. Proof everything twice.
- Send reminder emails to guests with parking and timing.

Event week

- Final headcount to the caterer. Print name tags, signage and the run-of-show.
- Walk the venue with the venue manager. Pack an emergency kit.
- Brief volunteers in a 15-minute huddle before doors open.

After

- Thank donors and sponsors within 48 hours.
- Reconcile the budget and pay vendors.
- Hold a 30-minute debrief: what to keep, change and drop next year.

Gala Run-of-Show Template

Time	What happens	Owner
2:00 pm	Vendor load-in, AV setup, tables and décor	Event lead
4:30 pm	AV check, mic test, slideshow run-through	AV + emcee
5:15 pm	Volunteer huddle and station assignments	Volunteer lead
6:00 pm	Doors open, check-in, cocktail hour, silent auction opens	Check-in team
7:00 pm	Guests seated, welcome from emcee	Emcee

Time	What happens	Owner
7:10 pm	Dinner service begins	Catering
7:45 pm	Mission moment: video or speaker	Program lead
8:05 pm	Live appeal or paddle raise	Auctioneer
8:30 pm	Silent auction closes, dessert served	Auction team
8:45 pm	Sponsor thanks and awards	Emcee
9:00 pm	Dancing and auction checkout	Auction team
10:00 pm	Event ends, teardown begins	Event lead

Tip: give every line one owner by name, and print the run-of-show for every vendor and volunteer lead.

Project Management

Start projects aligned and keep the money on track.

Project Kickoff Checklist

- 1 What does done look like? Write one sentence.
- 2 Who makes the final decisions?
- 3 Who is on the team, and what does each person own?
- 4 What is the deadline, and what are the milestones before it?
- 5 What is the budget, including time?
- 6 What could go wrong, and what is the backup plan?
- 7 Where will tasks live? Pick one tracker.
- 8 How often will the team check in, and in what format?
- 9 Who needs updates outside the team, and how often?
- 10 How will you know it worked? Pick one or two measures.

Event Budget Starter

Categories to budget

- **Venue:** rental, security, cleaning, insurance.
- **Food and beverage:** per-person catering, bar, service charges and gratuity.
- **Production:** AV, lighting, staging, entertainment.
- **Décor and rentals:** linens, florals, furniture, signage.
- **Marketing:** invitations, printing, postage, ads.
- **People:** photographer, emcee, auctioneer, staff.
- **Fees:** ticketing, payment processing, permits.
- **Contingency:** 10% of the total for the unexpected.

Tips

- Ask every vendor for an all-in quote, including tax and service charges.
- Track estimated, contracted and actual cost side by side.
- Get sponsors to underwrite specific line items, like the bar or the flowers.

Systems & Operations

Simple systems that keep sponsors, vendors and donors coming back.

Sponsor & Vendor Tracker Starter

Columns to include

- **Name and contact:** one person, one email, one phone.
- **Type:** sponsor tier, or vendor category (catering, AV, rentals).
- **Status:** Asked, In talks, Confirmed, Paid, Thanked.
- **Amount:** sponsorship or contract value.
- **Deliverables:** logo, tickets, signage, or what the vendor provides.
- **Due dates:** deposit, final payment, materials.
- **Next step and owner:** one action, one name.
- **Notes:** preferences, past history, special requests.

Habits that make it work

- Update it after every call or email, not at the end of the week.
- Sort by next due date each Monday.
- Keep one tracker everyone uses, not a copy per person.

The Donor Follow-Up Playbook

- 1 **Within 48 hours:** a personal thank-you email or call. Mention the amount raised and one specific moment from the night.
- 2 **Within 1 week:** a formal thank-you letter with the tax receipt. Hand-sign it.
- 3 **Within 30 days:** an impact update. Show what the money is already doing, with a photo or short story.
- 4 **Within 90 days:** an invitation to something small: a tour, a volunteer day or a coffee.
- 5 **Before next year's ask:** a recap of the year and a save-the-date. Never let the first contact in a year be a request for money.

Tip: log every touch in your tracker so the next person knows the whole history.