



Event Toolkit

**A Reference Kit of Samples and
Templates to Assist
Event Planning and Management**

2011

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**EXTERNAL RELATIONS
EVENT ATTENDANCE REQUEST**

To: Dr. David H. Turpin, President & Vice-Chancellor
University of Victoria

From:

Re: Request for your attendance.

EVENT _____

HOST/SPONSOR _____

DATE & TIME _____

LOCATION _____

REASON FOR EVENT _____

PRESIDENT'S ATTENDANCE RANKING: _____

1. President's attendance critical for the event- will reschedule if not available
2. President's attendance would be appreciated and it will add to the event
3. Courtesy invitation – President welcome if he wishes to attend

PRESIDENT'S RESPONSIBILITIES AT EVENT: _____

EVENT FORMAT (sit down dinner, reception, speeches, entertainment, etc):

OTHER COMMENTS/CONSIDERATIONS: _____

INVITATION EXTENDED TO THE FOLLOWING UVIC PEOPLE:

EXECUTIVE COUNCIL MEMBERS: _____

BOARD OF GOVERNORS: _____

DEANS' COUNCIL: _____

OTHER VIPS INVITED (eg. MLAs, Senior Bureaucrats, Foundation Board Members,
Mayors/Elected Representatives, Community Groups, etc): _____

PRESIDENT'S RESPONSE

- Yes I will attend.
- I would like a speech written for me.
- I would like talking points, but not a whole speech.
- I would like background information on attendees.
- I will _____ will not _____ be bringing a guest.
- No, I cannot attend and would suggest inviting _____ in my place.

cc: Shirley Lyon, External Relations
Martin Segger, Community Relations (if any elected representatives or
community groups are invited)

Attachments:
(please check off what is attached)

- Invitation
- Briefing Notes
- Biographical information
- Donor History

SAMPLE EVENT WORKPLANS

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Appendix 2.1 (A) Sample Event Workplan – Awards Event

AREA	TASK	WHO	ACTION / DEADLINE	DONE (✓)	COMMENTS
Administration	Development of timeline.				
Administration	Ongoing updates of workplan.				
Administration	Recruitment of Event Chairs				
Administration	Create Meeting Schedule for Committee until Event.				
Administration	Review Agenda & Minutes prior to circulation to Committee.				
Administration	Send out notification of Committee Mtgs.; prepare Agenda & circulate Minutes.				
Administration	Develop Budget.				
Administration	Set up Budget Code for event				
Administration	Identify reports required from the system and complete “dry run” to ensure all reports are possible. Ensure Admin Staff are fully trained on reports and information required to populate reports.				
Administration	Create Evaluation for Guests & Sponsors.				
Administration	Forward thank you letters: <ul style="list-style-type: none"> • volunteers • host(s) • award recipients • sponsors 				
Administration	Event Debrief.				
Program	Finalize selection of recipients.				
Program	Confirm with CH Television the ability to create videos of recipients.				
Program	Discuss with CH Television the availability of Hosts for Event.				
Program	Contact assigned Producer at CH to discuss vision for videos.				
Program	Work with CH Television to design & schedule Recipient interviews.				
Program	Develop interview questions for videos.				
Program	Finalize bios of recipients for Program, Website and Script.				
Program	Discuss content and flow of event program (i.e.: how many presentations will be done & how they will fit into overall program). Decisions will impact the style & format of the videos.				
Program	Confirm travel/accommodation plans all recipients.				
Program	Determine Entertainment options.				
Program	Order Awards/Gifts & Citations for recipients/inductees.				
Program	Determine Speakers (Board; Staff; etc.) & liaise with all speakers to discuss speaking opportunity at event. Prepare speaking notes as required.				

Appendix 2.1 (A) Sample Event Workplan – Awards Event

AREA	TASK	WHO	ACTION / DEADLINE	DONE (✓)	COMMENTS
Program	Determine photography needs for event and submit RFP for services.				
Program	Screen video interviews and request changes as required.				
Program	Develop information package, outlining Program, their role at event, seating arrangements, etc. & fwd to special guests; recipients; etc.				
Program	Write Script for Hosts. Circulate draft for input & approval.				
Program	Contact Hosts to discuss event and provide overview of Program/Script.				
Promotion	Purchase advertisement in Torch Magazine to promote event.				
Promotion	Prepare communications plan for promoting event & ticket sales. Consider the creation of articles specific to the award recipients and their municipality or their industry to ensure full community coverage.				
Promotion	Consider accessing industry specific newsletters and distribution channels (i.e.: member email lists) to forward articles on recipients and promotion about ticket sales.				
Promotion	Determine collateral communications materials required (i.e.: invitation; ticket; advertisements; sponsorship package; program; etc.).				
Promotion	Work with UVic Graphics to create all materials required based on previous years design and layout.				
Promotion	Update Website. Include website address in all promotional material.				
Promotion	Determine details around mailout of invitations (i.e.: number to be mailed; mailhouse to be used; timing of mailing)				
Promotion	Prepare a Request for Proposal for Photography				
Promotion	Finalize promotional material (i.e.: invitation, ticket, advertisements).				
Promotion	Prepare database for mailouts.				
Promotion	Mail out invitations.				
Promotion	Identify Media Spokesperson (Chairs) and prepare speaking notes.				
Promotion	Arrange for Media interviews with Chairs to promote event.				
Promotion	Determine Media requirement on-site for interviews/photo opportunities – book space as required.				
Raffle	Determine type of fundraising Raffle to be done at event.				
Raffle	Recruit Committee to secure prizes for Raffle.				
Raffle	Secure Raffle License.				

Appendix 2.1 (A) Sample Event Workplan – Awards Event

AREA	TASK	WHO	ACTION / DEADLINE	DONE (✓)	COMMENTS
Raffle	Order materials for raffle (i.e.: tickets; balloons; etc.)				
Sponsorship	Finalize sponsorship levels and recognition.				
Sponsorship	Contact all past sponsors to confirm involvement in previous event or similar events.				
Sponsorship	Confirm the amount of TC coverage that will be provided to the Event. Discuss how this is to be used and who will be the contact person for disbursement.				
Sponsorship	Meet with CH Television Radio partner to discuss opportunities for partnership.				
Sponsorship	Identify Sponsor prospects.				
Sponsorship	Schedule meetings with sponsor prospects & finalize Agreements.				
Sponsorship	Secure all sponsor logos for invitations, signage, program, etc.				
Sponsorship	Prepare Sponsor Event kit outlining itinerary; role at event; seating arrangements; exposure opportunities for sponsor; etc.				
Sponsorship	Confirm Sponsor recognition at event/in program/in script as per Sponsorship Agreements.				
Sponsorship	Have Sponsor signage created.				
Ticketing	Confirm ticket price based on budget.				
Ticketing	Review existing database for invitations and request input from Committee as to additions as well as other opportunities to promote tickets sales through University events.				
Ticketing	Determine policy for complimentary tickets.				
Ticketing	Create a Ticket Sales Committee to identify prospects & follow-up.				
Ticketing	Provide training for Admin Staff regarding online ticketing process and inter-departmental ticket/table purchases.				
Ticketing	Determine ticket sales strategy.				
Ticketing	Request list of ticket sales prospects from recipients. Create a specific letter of invitation for these individuals highlighting the recipient.				
Ticketing	Receive & process ticket purchases. Forward confirmation of ticket purchase.				
Ticketing	Create opportunities with Media Partners for ticket sales promo.				
Ticketing	Confirm number of purchased tickets required for each recipient.				
Ticketing	Design seating plan for guests, sponsors, recipients & inductees.				
Ticketing	Arrange mailout of tickets to guests and details on table seating.				
Ticketing	Finalize seating arrangements for Guests & Sponsors.				

Appendix 2.1 (A) Sample Event Workplan – Awards Event

AREA	TASK	WHO	ACTION / DEADLINE	DONE (✓)	COMMENTS
Ticketing	Prepare easel signs with table seating – 4 signs will be required.				
Ticketing	Prepare packing list for Registration Desk at event.				
Ticketing	Compile Guest Lists: <ul style="list-style-type: none"> • alpha sort • paid/unpaid • Sponsors & Guests 				
Venue Mgmt.	Place reservation at Victoria Conference Centre.				
Venue Mgmt.	Confirm booking of space				
Venue Mgmt.	Submit certificate of insurance to venue.				
Venue Mgmt.	Submit deposit payment for venue.				
Venue Mgmt.	Discuss the option of a pre-event reception for Recipients & Sponsors to allow for photo opportunities & any media interviews. Book additional space at venue as required.				
Venue Mgmt.	Preliminary site visit to review: <ul style="list-style-type: none"> • venue layout • staging / table seating / reception area • décor required • signage required • event logistics • food and beverage (including non-alcoholic options) 				
Venue Mgmt.	Request changeroom/hospitality room for volunteers & committee prior to and following event.				
Venue Mgmt.	Establish décor plan for interior with suppliers and present to Committee.				
Venue Mgmt.	Determine av & lighting requirements & request quote for services.				
Venue Mgmt.	Determine options for menu for reception & dinner & present to Committee.				
Venue Mgmt.	Develop floor plan with proper attention to traffic flow, table numbering, site line, music and sound systems, etc.				
Venue Mgmt.	Discuss with venue the timing of the meal service and incorporate allotment of time into overall program for the evening.				
Venue Mgmt.	Meet with AV Contractors to confirm & finalize overall requirements for event.				
Venue Mgmt.	Finalize décor plan and supplier order.				
Venue Mgmt.	Determine signage requirements.				

Appendix 2.1 (A) Sample Event Workplan – Awards Event

AREA	TASK	WHO	ACTION / DEADLINE	DONE (✓)	COMMENTS
Venue Mgmt.	Prepare signage copy. Forward to signmaker and/or produce in-house.				
Venue Mgmt.	Coordinate transportation for all awards/gifts/etc.				
Venue Mgmt.	Final site visit to review event rollout, logistics and food & beverage.				
Venue Mgmt.	Prepare complete event rollout for day (move in, event plan, tear down). Distribute.				
Venue Mgmt.	Confirm final numbers for catering.				
Venue Mgmt.	Site Logistics Management – Event Day <ul style="list-style-type: none"> • move in • décor • site management (event) • tear down 				
Volunteers	Confirm costs, if any, that will be provided for volunteers (i.e.: parking; transportation; meal; honourarium; etc.)				
Volunteers	Determine volunteer requirement (i.e.: duties; shifts; etc) and create volunteer shift schedule.				
Volunteers	Confirm # of University volunteers available.				
Volunteers	Confirm volunteer apparel.				
Volunteers	Contact volunteers & provide overview of role. Request apparel sizing if required.				
Volunteers	Schedule a pre-event orientation session for all volunteers.				
Volunteers	On-site training/orientation for volunteers.				

Appendix 2.1 (B) Sample Event Workplan – Building Opening/Naming

Building Opening/Naming Date Location

TIMELINE

AREA	TASK	WHO	DUE	DONE (√)
Administration	Confirm availability of Chair & President for event			
Administration	Prepare Guest List			
Administration	Create Invitation			
Administration	Prepare Budget			
Administration	Mail out of Invitations			
Administration	Create Program			
Administration	Thank you letters to volunteers			
Communications	Confirm who will be the Media contact			
Communications	Prepare Media Release & circulate for approval			
Communications	Determine space for Media at event			
Communications	Confirm a media feed with AV Supplier			
Communications	Distribute Media Release			
Communications	Follow-up with Media regarding attendance at event			
Communications	Greet Media at event and provide assistance required			
Décor	Book popup display through UComm			
Décor	Book pop up display through Education			
Décor	Confirm how materials will be displayed & space required			

Appendix 2.1 (B) Sample Event Workplan – Building Opening/Naming

AREA	TASK	WHO	DUE	DONE (√)
Décor	Contact Décor Supplier to discuss options			
Décor	Order signage (welcome; directional)			
Décor	Mount citation onto poster board for display			
Program	Confirm Photographer			
Program	Determine order of proceedings for event			
Program	Confirm that Chair will serve as Emcee			
Program	Confirm participation of musicians (play while guests are arriving; play during reception; piano & singer during Program)			
Program	Finalize travel plans & accommodation requirements for special guests			
Program	Identify Host for special guests to assist with transportation to/from events & general logistics			
Program	Discuss order of proceedings with President & Chair			
Program	Write script for Emcee			
Program	Prepare speaking notes for Chancellor			
Program	Prepare Photo Shoot List			
Program	Assist Photographer on site to capture all photos			
Venue	Venue tour to determine best location for ceremony			
Venue	Venue tour with Facilities Management to discuss signage placement			
Venue	Venue tour with Equipment Supplier to discuss setup and equipment required (i.e.: Tents; Tables; Chairs; Staging)			
Venue	Venue tour with Audio Visual Supplier to discuss setup and equipment required			
Venue	Contact Grounds (Tony James) to			

Appendix 2.1 (B) Sample Event Workplan – Building Opening/Naming

AREA	TASK	WHO	DUE	DONE (√)
	confirm use of space and cleanup required			
Venue	Contact Buildings (Colin Butterfield) to confirm cleanup required inside MacLaurin			
Venue	Reserve lecturn			
Venue	Contact Parking (Gordon Dash) to confirm space required			
Venue	Meet with Food Services to discuss catering requirements			
Volunteers	Determine number of volunteers required			
Volunteers	Create a volunteer schedule of tasks and shifts			
Volunteers	Recruit volunteers			
Volunteers	Meet volunteers on site and direct to positions			

Appendix 2.1 (B) Sample Event Workplan – Building Opening/Naming CHECKLIST

CHECKLIST FOR BUILDING OPENING OR NAMING CEREMONY

Preliminary:

- Contact University Ceremonies & Events Office to discuss scope of event and any assistance their office can provide _____
- Confirm date and time _____
- Arrange and/or book venue(s) _____
- Confirm principals for event _____
- Complete & submit an Event Attendance Request Form for the President _____

Invitation:

- Prepare draft of invitation _____
- Send invitation to Graphics/Printing _____
- Mail invitations 3/4 weeks prior to function _____
- Map to be included with invitation _____
- Confirm with Jim Soles, ED Govt Relations if any government officials will be invited _____

Guests:

- Prepare guest list _____
- Prepare guest list for acceptances/regrets _____
- Make note of any special arrangements for greeting, etc. _____

Security:

- Contact Gordon Dash for special permit pkg _____
- Contact Ken Marrison to inform of event on campus _____

Facilities Management:

- Contact Dino Valeri – recognition plaques (need 6 wks notice) _____
- Contact Tony James – grounds cleaning _____
- Contact Colin Butterfield – indoor facility cleaning _____

Appendix 2.1 (B) Sample Event Workplan – Building Opening/Naming CHECKLIST

Food Services:

Contact Daphne Andrews, Food services _____

Publicity:

Contact Patty Pitts, UVic Communications _____

Signage:

Arrange for signs & easels directing to event _____

Book pop-up banners through the Ceremonies & Events _____

Office, if necessary _____

Photographs:

Contact Photo Services _____

Sound/Lighting:

Contact UVic Auditorium Technical Director or Uvic AV
Services re: soundsystem _____

Staging for Ceremony:

Stage; Lectern; Tent; Chair _____

Book Display Unit through UVic Communications _____

Order of Proceedings:

Confirm Emcee for event & prepare script _____

Confirm with President and other principals _____

Printed Program:

Photos, Bios, Architect Acknowledgements, Order of Proceeding _____

Appendix 2.1 (C) Sample Event Workplan – Conference

Conference Title
Date
Location

AREA	TASK	WHO	START DATE	DEADLINE	DONE (✓)	COMMENTS
Administration	Meet with Organizing Committee to finalize event activities and schedule.					
Administration	Meet with Webmaster to determine web links.					
Administration	Finalize total event budget.					
Administration	Develop Meeting Schedule for Organizing Committee.					
Administration	Develop project management database to capture all attendees, sponsors, exhibitors, volunteers and program speakers.					
Administration	Record, process and reconcile all revenues including exhibitor and registrant conference fees.					
Administration	Provide ongoing monthly activity status reports to Committee.					
Administration	Preparation of Final Report outlining project activities, recommendations for improvement and complete financial reconciliation.					
Conference Program	Finalize all topics and identify appropriate Speakers for sessions.					
Conference Program	Recruit Keynote Speaker for Plenary Session.					
Conference Program	Finalize write-ups of sessions and speakers bios/photos, if required, for Brochure/Registration Package.					
Conference Program	Finalize Conference Program (i.e.: schedule of sessions; breaks; room assignments; etc.).					
Conference Program	Prepare and fwd. Speaker Confirmation package including Speakers Agreement; A/V req., expense forms, other information as required.					
Conference Program	Compile A/V requirements and include in overall Tender for A/V support for Conference.					
Conference Program	Identify & confirm Workshop Facilitators/Moderators.					
Conference Program	Edit write-ups & Workshop Titles for purpose of Brochure material.					
Conference Program	Ongoing contact with Speakers, as required.					
Conference Program	Determine Speakers Gifts.					

Appendix 2.1 (C) Sample Event Workplan – Conference

AREA	TASK	WHO	START DATE	DEADLINE	DONE (✓)	COMMENTS
Conference Program	Order Speakers Gifts.					
Conference Program	Schedule Conference Calls with Speakers & Workshop Facilitators/Moderators.					
Conference Program	Develop Speakers Welcome kit for distribution at Registration.					
Exhibitors	Collate Exhibitor 'spec' package.					
Exhibitors	Secure listing of potential exhibitors.					
Exhibitors	Receive Exhibitor registrations. Enter into database.					
Exhibitors	Distribute exhibitor solicitation package.					
Exhibitors	Follow up with phone calls to potential exhibitors.					
Exhibitors	Develop Exhibitor Kit.					
Exhibitors	Distribute Exhibitor Kits as registrations received.					
Exhibitors	Develop a strategy for Exhibitor's Guest Passes.					
Exhibitors	Deadline for return of exhibitor information.					
Promotion/Marketing	Confirm Logo.					
Promotion/Marketing	Prepare electronic file of logo for colour and black/white use.					
Promotion/Marketing	Fwd Letter of Agreement with Artist confirming use of logo and request for limited edition prints for speaker & sponsors gifts.					
Promotion/Marketing	Determine web page applications for conference materials.					
Promotion/Marketing	Discuss with Committee type of conference materials required (i.e.: Brochure; Registration Form; Exhibitor Packages; Letterhead; Fax Cover Sheets; Memo Paper; Conference Kits; Name tags; etc.).					
Promotion/Marketing	Identification & selection of Graphic Designer/Printer for design/layout & production of brochure and other materials.					
Promotion/Marketing	Compilation of Conference information and forward all data to Designer for insertion into Brochure.					
Promotion/Marketing	Confirm Photography Contest details and include in Registration package.					
Promotion/Marketing	Collate databases for distribution of conference announcement; materials etc. in hard copy and/or electronic.					

Appendix 2.1 (C) Sample Event Workplan – Conference

AREA	TASK	WHO	START DATE	DEADLINE	DONE (✓)	COMMENTS
Promotion/Marketing	Review 1 st Draft of Brochure at Committee Mtg.					
Promotion/Marketing	Meet with Designer to review changes for Brochure and request final Draft.					
Promotion/Marketing	Review Final Draft of Brochure.					
Promotion/Marketing	Oversee production & delivery of Brochures.					
Promotion/Marketing	Determine process/systems for conference communication & enquiries.					
Promotion/Marketing	Create Press Releases for Sponsorship acquisition announcements.					
Promotion/Marketing	Research options for merchandising & place order.					
Promotion/Marketing	Present options to Committee for decision.					
Promotion/Marketing	Arrange for booth(s) at conference to sell merchandise.					
Registration	Determine Conference Secretariat and mailing address.					
Registration	Develop Confirmation Package for registrants including conference information, hotel/city brochures, travel options, etc.					
Registration	Function as Conference Secretariat and mailing address. Receive and process registrations. Forward confirmation and conference package.					
Registration	Set up and provide on-site Registration services.					
Registration	Develop and collate Conference Kit in conjunction with Organizing Committee and Conference Speakers.					
Registration	Develop and collate Spousal/Accompanying Person Registration Kit.					
Social	Develop a Spousal/Accompanying Person Tour Program including a minimum of 3 options (Greater Vancouver, Whistler, Vancouver Island).					
Social	Determine entertainment for Thurs and Fri evenings.					
Social	Develop program for Thursday evening Reception.					
Social	Develop program for Wednesday evening Social for the Chiefs.					
Social	Determine Friday night program (i.e. dinner cruise, formal dinner).					
Sponsorship	Finalize Sponsorship Program, identifying sponsorship levels; fees; and recognition.					
Sponsorship	Identify prospects for sponsorship.					

Appendix 2.1 (C) Sample Event Workplan – Conference

AREA	TASK	WHO	START DATE	DEADLINE	DONE (✓)	COMMENTS
Sponsorship	Create Sponsorship Proposal packages for prospects.					
Sponsorship	Present Sponsorship Proposals.					
Sponsorship	Create Sponsorship Agreements.					
Sponsorship	Package Sponsors Recognition packages (i.e.: artwork; plaque; merchandise; certificate; etc.).					
Sponsorship	Fwd registration/accommodation/logistics package to sponsors to confirm any special requests for travel; accommodation; meals; etc.					
Sponsorship	Ongoing contact with Sponsors and monthly updates re new acquisitions etc.					
Sponsorship	Determine hospitality options for sponsors at event & make necessary arrangements.					
Sponsorship	Fwd letter of welcome; itinerary for conference & sponsor hospitality opportunities.					
Sponsorship	Create Sponsorship Welcome Kits for distribution at event (name tags; tickets; itineraries; conference program; etc.).					
Sponsorship	Ensure fulfillment of Sponsorship Agreement by both sponsor and Conference Committee.					
Sponsorship	Prepare Thank you letters for signing by Conference Chair.					
Venue	Develop preliminary site plan for exhibitors.					
Venue	On-site meeting with hotel/venue to review all space (meetings; exhibit; reception/social function) and hotel services (food/beverage; security; audio-visual).					
Venue	Secure bids re audio visual and exhibit suppliers.					
Venue	Coordinate all audio/visual requirements for all phases of conference and events.					
Venue	Develop and coordinate décor & theme.					
Venue	Provide and distribute confirmation package for all exhibitors confirming move-in, move-out & site logistics.					
Venue	Coordinate all food & beverage requirements (including special diet needs) with hotel for all conference programming and supplemental social activities.					
Venue	Secure bids re signage.					
Venue	Determine all signage requirements.					

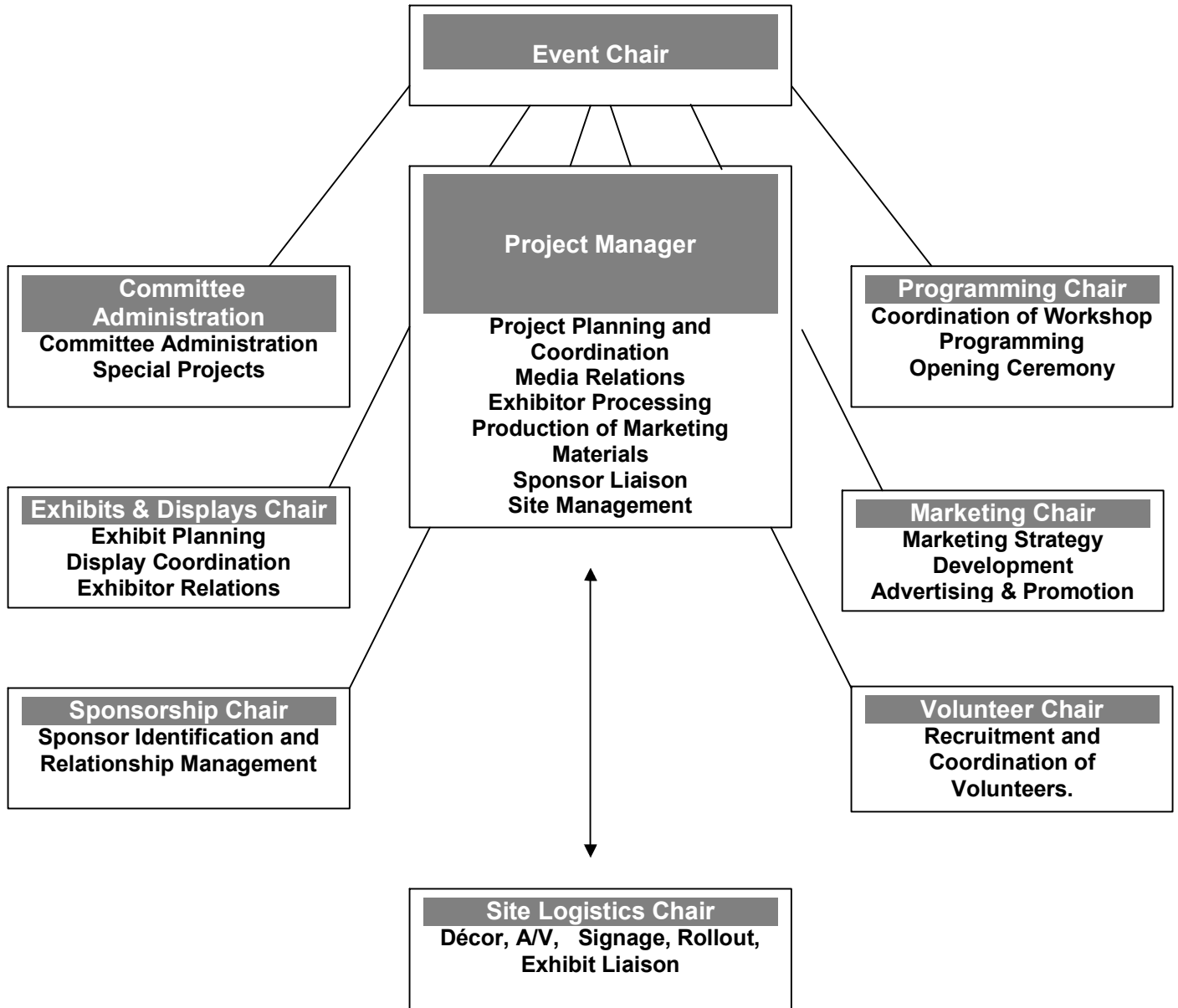
Appendix 2.1 (C) Sample Event Workplan – Conference

AREA	TASK	WHO	START DATE	DEADLINE	DONE (✓)	COMMENTS
Venue	Place final order for signage.					
Venue	Coordinate and manage volunteer staffing of Hospitality Desk at Registration Area.					
Venue	Finalize food & beverage quantities with hotel.					
Venue	Coordinate move in and set up of exhibitor area.					
Venue	On-site venue management.					
Venue	Tear down and coordination of move-out.					
Volunteers	Determine policy & “perks” for volunteers (i.e.: access to sessions; meals; special event access; transportation expenses; identification apparel; etc.).					
Volunteers	Identify Volunteer duties & create schedule.					
Volunteers	Recruit & assign volunteers as per duties & schedule.					
Volunteers	Prepare letter of welcome for volunteers from Conference Chair.					
Volunteers	Ongoing contact with volunteers.					
Volunteers	Arrange for a Volunteer Hospitality/Mtg. room at venue.					
Volunteers	Prepare and implement training/orientation for volunteers.					
Volunteers	Prepare Thank you letters/Certificates/etc. for all volunteers for signing by Conference Chair.					

Event Name Budget

		OPTIMUM BUDGET - 200 Delegates		
REVENUE		Unit Amt	Qty	Ext
Sponsorship				
	Presenting Sponsors	5,000	2	10,000
	Workshop Sponsors	1,000	11	11,000
Delegates				
	Conference Fee	225	200	45,000
TOTAL REVENUE				\$66,000
EXPENSES				
Marketing				
	Graphic Design			3,000
	Printing			5,000
	Advertising - Print			3,000
	Web Development & Servicing			3,000
	Poster Distribution			300
	Early Bird Draw Gift			250
Food & Beverage				
		PreTax/Grat	Inclusive	
	Opening Reception	10	12	
	Lunch	28	34	
	Breaks x 2	7	9	
	Closing Reception	21	26	
	Volunteers/Staff			300
			225	18,225
Speakers - Handouts				
	Keynote Speaker		1	6,000
	Speaker Travel			3,000
	Workshop Speakers	9	500	4,500
	Speaker Gifts			500
Venue				
	Site Rental			5,000
	Décor			1,500
	Signage			500
	Audio Visual			2,500
Site Management				
	Registration Equipment			1,000
	Delegate Kits		5 225	1,125
	Speaker Handouts		5 225	1,125
	Volunteer Mgmt			150
Administration				
	Phone			300
	Postage			500
	Courier			100
TOTAL EXPENSES				\$60,875
NET PROFIT/LOSS				\$5,125

Event Committee Organizational Chart



Welcome to The Business Conference

There are over 40,000 men and women in business in the Greater Victoria community. Their efforts and leadership in business, government, education and not-for-profit community organizations contribute significantly to the economic and social sustainability of our community.

The Business Conference is committed to the personal and professional development of these business people in our community. The conference has been designed to further enhance specific skill levels across private, public and not-for-profit sectors while also providing networking and personal growth opportunities. Within the conference design, it was the intent to further incorporate social and interactive opportunities to maximize networking.

A business-specific trade show accompanies the conference to provide a compact opportunity to find out more about current suppliers, services and programming relative to success in the business world.

The Business Conference ... at a Glance ...

Date:	October 31, 2010 (In celebration of Small Business Week)
Hours:	8:00 a.m. – 6:00 p.m.
Location:	University of Victoria
Type of Event:	Dynamic one-day professional and personal development conference and business-specific public trade show targeted to the business community
Purpose:	To enhance the professional skills of the business community To provide networking and personal growth opportunities To provide trade show opportunities and information relative to contemporary products and services specific to business professionals
Offerings:	Keynote Presentations – Opening & Closing Nine 1½ Hour Skill-Based Hands-on Workshops Formal Sit-down Lunch with Motivational Keynote Speaker Panel Presentation – Trends and Change Management 'Open Mic' Forum and Dialogue
Attendees:	Anticipate 200 – 250 Conference Delegates
Exhibitors:	40 – 50 Business Specific Exhibitors

The Sponsorship Invitation

While several cash and in-kind opportunities have been identified, we have been deliberate in limiting the number of partnerships to ensure that each of our sponsors receives the maximum amount of exposure and profile for their investment.

A listing of the available sponsorship opportunities and benefits are outlined on the following pages. We have been very sensitive to create partnership opportunities that maximize opportunities to best link individual sponsors with an appropriate event identity to maximize return on investment.

Partnership with *The Business Conference* will provide numerous direct and indirect benefits:

- Broad exposure to the Greater Victoria community through an aggressive promotion and advertising campaign including flyers, posters, direct media advertising and web marketing.
- Direct exposure and trade show marketing opportunities to over 200 targeted delegates.
- An opportunity to publicly profile your corporate and organizational commitment to personal and professional development of staff and managers within your company or association.
- An opportunity to evidence your position within the local business community.
- An opportunity to strategically network!

Title Sponsor
\$5,000 Cash
One Exclusive Opportunity

Pre-Event:

- Full partner recognition with event
- Logo inclusion on event letterhead
- Logo inclusion in newspaper advertisements
- Logo inclusion on all electronic promotions
- Logo inclusion in all media releases
- Logo inclusion on all promotional materials (i.e.: brochures, posters, tickets)
- On-air promotion through radio and television advertisements
- Link to event website

During Event:

- Prominent logo placement on all Conference materials
- Double Exhibit Booth (Prime location)
- Prominent signage on-site
- Speaking opportunity at Conference Opening
- Opportunity to offer promotional material to conference delegates
- **3** Conference Passes

Post Event:

- Logo recognition in all post-event correspondence and thank-you's
- Complete contact listing for all conference delegates and exhibitors

Appendix 3.1 – Sample Sponsorship Package

Event Partners

\$2,500 Cash

**Two Exclusive Opportunities for Property Sponsorship of:
Luncheon & Keynote Presentation
Exhibit Hall**

Pre-Event:

- Identity with one specific Conference property (i.e. Keynote Presentation or Exhibit Hall)
- Logo inclusion in newspaper advertisements
- Logo inclusion on all electronic promotions
- Logo inclusion in all media releases
- Logo inclusion on all promotional materials (i.e.: brochures; posters, tickets)
- On-air promotion through radio and television advertisements
- Link to event website

During Event:

- Prominent logo placement on all Conference materials
- Single Exhibit Booth (Prime location)
- Prominent signage on-site
- Speaking opportunity (Introduction of keynote – or podium opportunity at trade show opening)
- Opportunity to offer promotional material to conference delegates
- **2** Conference Passes

Post Event:

- Logo recognition in all post-event correspondence and thank-you's
- Complete contact listing for all conference delegates and exhibitors

Event Friends

\$1,000 Cash or In-Kind Sponsorship

**Opportunities for Property Sponsorship of:
Individual Workshop (9 Opportunities)
Nutrition Breaks (2 Opportunities)**

Pre-Event:

- Name inclusion in newspaper advertisements
- Name inclusion in all media releases
- Name inclusion on brochures and posters

During Event:

- Name recognition in Conference Kits
- Table top signage at workshop or nutrition break
- Opportunity to introduce speaker (workshop sponsors only)
- **1** Conference Pass

Post Event:

- Complete contact listing for all conference delegates and exhibitors

Appendix 4.1 – Speakers Agreement Template

SPEAKER CONFIRMATION

A. CONTACT INFORMATION

Speaker: Name
Company: Company
Address: Address **Phone:** xxx-xxx-xxx
City, Prov, PC **Fax:** xxx-xxx-xxx
Email:

B. PRESENTATION INFO

Date: Date
Presentation: Topic or type (i.e. panel, keynote)
Presentation Time: Start and end time **Room:** Room location
Arrival Time: Time to arrive at venue **Set Up:** Type of set up
Arrival Contact: Site Manager or contact **Capacity:** # of expected attendees

C. SPEAKER REQUIREMENTS (Please check off specific presentation requirements.)

- Wireless Mic
 - Lavelier Mic
 - PC Computer
 - LCD Projector
 - Overhead Projector
 - Additional Requirements (if any):
-

D. HANDOUTS

- I will not be providing handouts
 - I will be using handouts. I will bring my own.
 - I will be using handouts. I require photocopies made by the University.
(Note: Please ensure materials are received 1 week prior to the event. They can be emailed to name@emailaddress.com.)
-

E. FEES AND EXPENSES - TRAVEL AND ACCOMMODATION

Fees: \$000.00
Travel: Mode of approved transportation or indicate "N/A"
Accommodations: Hotel, date, confirmation number (if applicable) or indicate "N/A"

Signed: _____ **Date:** _____

Please complete this Speakers Agreement and fax back to xxx-xxxx with a

brief bio that can be used for introductory purposes.

School of Business Trade Fair
MARKETING & COMMUNICATIONS PLAN

1. PROJECT OVERVIEW:

Event Purpose	<ul style="list-style-type: none"> An educational trade fair designed to showcase business services in the community and the education/development programming through University of Victoria.
Positioning & Key Messaging	<p>The University of Victoria Trade Fair is:</p> <ul style="list-style-type: none"> a compact one day event to answer a wide variety of business related questions; a one-stop shopping point for business products and services; an opportunity to learn more about business programs and executive development initiatives; a networking opportunity.
Logistics & Scheduling	<p>April 1st 10:00 a.m. – 4:00 p.m.</p>
Potential Sponsors	<p>Community minded business organizations seeking overall profile – i.e. banks, business associations. MEDIA SPONSORS (Proposed):</p> <ul style="list-style-type: none"> CFAX 1070 CH TV Times Colonist <p>IN-KIND SPONSORS In-kind opportunities re event goods and/or services.</p>
Target Markets & Stakeholders	<p>Primary Target Markets:</p> <ul style="list-style-type: none"> Private Sector Businesses General Public Business Associations Educational Institutions <p>Stakeholders:</p> <ul style="list-style-type: none"> University Community Corporate and Community Sponsors Media Partners
Packaging & Pricing Strategies	<ul style="list-style-type: none"> Exhibitors – Price TBD Attendees – No Charge

Appendix 5.1 – Sample Marketing Plan

2. MARKETING & PROMOTION:

Marketing Tools	<p>DIRECT ADVERTISING</p> <ul style="list-style-type: none"> • posters • brochure • newspaper advertising (paid & sponsored) • radio/television ads 	Feb
	<p>MEDIA PROMOTION</p> <ul style="list-style-type: none"> • media sponsor promotion • media interviews • PSA's & Calendar of Events 	March
	<p>GENERAL PROMOTION</p> <ul style="list-style-type: none"> • personalized letter of invitation • University web site • email bulletin – list serves • email footers – sponsors, committee members • newsletters (community-wide) • partnership tools with sponsors • promotion through service clubs and business associations 	Jan, Feb, March
	<p>DIRECT SELLING</p> <ul style="list-style-type: none"> • School of Business • Students • Chambers of Commerce 	Feb, March

EXAMPLE:

Time	Activity	Location	Who
10:00	➤ Volunteers arrive and start site set up.	Reception Desk	Volunteers Site Manager
10:30	➤ Suppliers arrive to set up décor and audio visual.	Stage Area	Supplier Name Supplier Name
12:00	➤ Food arrives from caterer.	Reception Area	Caterers Name Name
12:30	➤ Meet speakers at front entrance.	Front Entrance	Site Manager
12:45	➤ All volunteers in place.	Various	All
12:50	➤ Guest arrival.	Front Entrance	

TEMPLATE:

Event Name
Location
Date
Time

Time	Activity	Location	Who

Audio Visual	Atlas Audio Video Unlimited 821 Fort Street Victoria, BC V8W 1H6	P. (250) 385-2712 F. (250) 385-3387 www.avu.ca
	Sharps Audio Visual #12-1950 Government Street Victoria, BC V8T 4N8	P. (250) 385-3541 F. (250) 385-3540 www.sharpsav.com
Caterers	Cheryl's Gourmet Pantry 2007 Cadboro Bay Victoria, BC V8R 5J4	P. (250) 595-3212 F. (250) 595-1294 www.cherylsgourmetpantry.com
	Cooks Day Off 1883 Fort Street Victoria, BC V8R 1K1	P. (250) 598-3228 F. (250) 598-3248
	Feys & Hobbs Catered Arts 1-845 Viewfield Road Victoria, BC V9A 4V2	P. (250) 380-0390 F. (250) 380-0398 www.feysandhobbs.com
	Food for Thought Caterers 5-1002 Goldstream Avenue Victoria, BC V9B 2Y5	P. (250) 478-2721 F. (250) 474-0378 www.foodforthoughtcatering.net
	Decorate Victoria - Huff n Puff 1A-460 Tennyson Place Victoria, BC V8Z 6S8	P. (250) 382-4833 F. (250) 385-4839
Decor	Illusions & Themes 661 Alpha Street Victoria, BC V8Z 1B5	P. (250) 995-1645
	Display and Tents	
	Commonwealth Special Events #3-1002 Goldstream Avenue Victoria, BC V9B 2Y5	P. (250) 391-0902 F. (250) 391-0922 www.commonwealthspecialevents.ca
	Island Professional Displays Ltd. 544 Hillside Ave. Victoria, BC V8T 1Y9	P. (250) 385-3541 F. (250) 385-3540 www.islanddisplays.com

Event Rentals	Gala-Van #1-460 Tennyson Place Victoria, BC V8Z 6S8	P. (250) 383-5431 F. (250) 383-5331 www.gala-van.com
	Joe the Bartender 560 David Street Victoria, BC V8T 2C8	P. (250) 382-2315 F. (250) 382-3517
	Pedersens Party Rentals 206 Mary Street Victoria, BC V9A 3V9	P. (250) 383-7783 F. (250) 383-1081 www.pedersens.com
Florists	Brown's the Florist 757 Fort Street Victoria, BC V8W 1G9	P. (250) 388-5545 F. (250) 3883511 www.brownsflorist.com
	Cadboro Bay Florists 1380 Harrop Road Victoria, BC V8P 2S4	P. (250) 477-2262 F. (250) 477-2305 www.members.shaw.ca/ cadborobayflorist
	Jennings Florist 2508 Estevan Avenue, Victoria, BC V8W 1C1	P. (250) 477-9538 F. (250) 477-3444 www.jenningsflorists.com
Lighting	Pacific Audio Works 3119 Steele Street Victoria, BC V8Z 3N7	P. (250) 380-7291 F. (250) 380-7292
Signage	Digital Direct Printing Ltd. 564 Hillside Avenue Victoria, BC V8T 1Y9	P. (250) 388-7082 F. (250) 360-1375 www.digitaldirectprinting.com
	GraphicFX Signworks 601 Alpha Street Victoria, BC V8Z1B5	P. (250) 382-7446 F. (250) 382-7448 www.382sign.com
	Island Blue Print 905 Fort Street Victoria, BC V8V 3K3	P. (250) 385-9786 F. (250) 385-1377 www.islandblue.com
	Speedpro Signs Plus 2626 Douglas Street Victoria, BC V8T 4M1	P. (250) 388-7770 F. (250) 388-3101 www.speedpro.com

Appendix 8.1 – Sample Volunteer Schedule

Event Name
Location
Date - Time

AREA	TIMING	REQUIRED	VOLUNTEERS
Set Up	10:00 – 12:30	4	1. 2. 3. 4.
Greeters	12:30 – 1:30	3	1. 2. 3.
Coat Check	12:30 – 1:30	2	1. 2.
Reception Area	2:00 – 3:00	4	1. 2. 3. 4.
Staging Area	1:00 – 2:30	1	1.
Photography	12:30 – 3:00	1	1.
Clean Up	3:00 – 4:00	4	1. 2. 3. 4.

Event Contact: Name
 Cell Phone Number

Appendix 8.2 – Sample Volunteer Position Description

JOB TITLE	Greeters		
LOCATION	Main Entrance	TEAM LEADER Supervisor Name	
# REQUIRED	3	TIME REQ'D	9:30 – 1:30
	3		1:30 – 5:30

OBJECTIVES	<ul style="list-style-type: none"> • Ensure all attendees are welcomed upon arrival, receive an Event Program and given directional information, if necessary.
JOB ACTIVITIES	<ul style="list-style-type: none"> • Smile and welcome attendees to event “Welcome to the University of Victoria. We hope you enjoy your visit. May I offer you an Event Program?” • Distribute Event Programs to guests. • Welcome media and direct them to Event Manager. • Welcome workshop presenters and direct them to the Speakers Lounge.
SKILLS REQUIRED	<ul style="list-style-type: none"> • Enjoys working with public • Good customer service skills • Ability to stand on feet for extended periods of time
DRESS CODE	<ul style="list-style-type: none"> • Black bottom; white top • Vests provided upon arrival

How did you hear about the conference? (Check all applicable.)

- Brochure
- Website
- Posters
- Radio
- Television
- Newspaper
- Word of Mouth
- E-Blast
- Other (Please specify) _____

Why did you attend?

- Workshops
- Displays and Exhibits
- Keynote Speakers
- Social
- Networking
- Professional Development

What did you find most beneficial for you?

(Please rank in order, 1 being most beneficial)

- _____ Keynote Speakers
- _____ Networking Opportunities
- _____ Workshops
- _____ Displays and Exhibits
- _____ Afternoon Panel
- _____ Professional Development

Did the event meet your expectations?

- Yes No

Should the event be continued

- Yes No

Would you attend again?

- Yes No

If no, why?

How do you feel the event could be improved?

_____**GENERAL COMMENTS:**

PLEASE COMPLETE THE REVERSE SIDE. ►

Appendix 9.1 – Sample Event Evaluation (Conference)

CRITERIA	RANKING: Please circle (Ranking 1 to 5 with 1 being poor, 3 good and 5 excellent)					COMMENTS
Overall Day Programming	1	2	3	4	5	
Keynote Presentations	1	2	3	4	5	
Plenary Panel Discussion	1	2	3	4	5	
Workshop Selections	1	2	3	4	5	
Workshop Speakers	1	2	3	4	5	
Time of Year	1	2	3	4	5	
Day of Week	1	2	3	4	5	
Event Timing	1	2	3	4	5	
Venue	1	2	3	4	5	
Food/Beverage	1	2	3	4	5	
Delegate Bags	1	2	3	4	5	
Pricing	1	2	3	4	5	
Marketing Materials	1	2	3	4	5	
Décor & Presentation	1	2	3	4	5	
Staff & Volunteers	1	2	3	4	5	
Conference Management	1	2	3	4	5	

May we contact you for clarification on any of the above? (Yes/No):

(Optional):

NAME: _____ **PHONE NO:** _____

Thank you – your participation is appreciated!