



**University
of Victoria**

University
Ceremonies & Events

Event Handbook

**Event Planning Reference
Guide**

2011

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Section 1

Getting Started

Events, like any other special project, can be exciting, challenging and rewarding. A successful event does not depend on spending lots of money but on originality, creativity and meticulous planning. Since events are demanding on staff and budget resources, you must carefully assess the reasons for hosting an event and answer a number of questions before you make the decision to proceed. Here are a few key factors to consider:

Who?

- Who is your target audience in terms of attending the event?
- How easily will you be able to promote the event to your target audience?
- Will they need to pay to attend your event and if so, is the price affordable?

What?

- What will the event parameters look like? Will it cover the span of a couple of hours or be a full-day/multi-day event?
- How easy will it be to build the program and secure the necessary participants such as speakers and dignitaries?
- What type of event activities will be involved?

When?

- When would be the best time of year to hold the event and how does this fit in with other things happening at the University or in the community?
- How much planning time will you need based on the date you have selected?

Where?

- What is the best location for the event? Should it be held on-campus or at an off-campus location?
- What is the availability of the site?
- What is the cost of the site and is this within your budget?

Why?

- Why are you holding an event? What is the objective and purpose? Is the event intended to be a fundraiser, an awareness builder or a celebration?
- Is there another way to meet the same objective?
- Does the event fit with the strategic mission and goals of your group and the University?

Apart from these questions, there are other important considerations.

- What budget will you need for this event? How accessible is this money?
- Do you have the necessary staff and/or volunteer resources to plan and manage the event?
- Do you have the appropriate planning time available to ensure the event is a success?

These questions should become part of your feasibility plan, and will assist you in deciding whether to proceed with the event or not. Remember it is always better to pull out of an event than to host a failure.

Event Planning – The Process:

Whether you are planning a large multi-day event or a smaller two to three hour Reception, the steps in planning a successful event are very similar and will change only in scope and complexity.

Step 1 ► **Define the Event Objective and Goals**

Make sure the purpose for the event is important enough to merit the time and expense needed to properly plan and host the event. Do you want to reach out to promote some aspect of your department to the outside community? Recognize a student or donor? Increase profile for your school? While all of these are valid reasons to hold an event, make sure you have at least considered alternative ways of achieving the same objective.

Step 2 ► **Form a Planning Committee**

The probability of success of any event is increased by the enthusiasm and dedication of the people who plan and organize it. You want this event to be fun to plan and organize, as well as to attend. Your planning committee should have enough members to share the work, and represent a variety of skills. The leadership around your Committee will be critical to its success and this role should be filled carefully.

Step 3 ► **Brainstorm Event Ideas**

Even though you may have a general idea of what your event will look like, it can be very powerful to open the vision to the Planning Committee and/or others involved. Give free reign to your imagination. The type of event you choose should fit the size, interest, talents, goals, and time availability of your group. Carefully match the type of event that is selected to the objective and purpose you initially defined.

Step 4 ► **Schedule the Event**

Scheduling may become one of the most important decisions regarding your event. You will need to ensure that you select a time and place that is appropriate and convenient for those attending. You will want to ensure your event does not conflict with other competing events or activities either on-campus or in the community, if the event will be open to the general public. If you are planning on inviting the senior administration of the University, you will need to contact their offices to confirm availability. To request the President's attendance, an Event Attendance Request Form needs to be completed and forwarded to his office. To request the attendance of a federal or provincial Minister, MP or MLA, requests must be coordinated through the Executive Director of Government Relations.

Step 5 ► **Prepare a Budget**

An essential item in your planning process is the budget development. It is important you identify your expenses upfront as it will let you see if the event is viable and which expenses need to be reduced. It is often through the budget development process that you ultimately determine what your event looks like. It will help you determine if you need to be charging fees to attend the event or whether you should be looking at sponsorship.

Step 6 ► **Develop an Event Workplan**

Proper planning is the most important part of the event. It does not matter if you have two years or only a few weeks to organize the event – the planning will ensure that all areas are covered. A proper Event Workplan will not only force you to think through all aspects of the event but further, it will clearly outline the tasks, who is responsible for them, and when they must be completed. It will become the roadmap for your event and help you and your committee stay on track, ensuring everything is done in a timely fashion. Deadlines that are missed with any type of project can have a negative impact but with events they are even more critical. You have no flexibility in your timing. Event day will arrive as planned!

Step 7 ► **Prepare a Marketing Strategy**

Publicity and promotion are key to any successful event. Promoting a special event takes creative thinking balanced with the practicality of resources and budget. How well you promote the event or spread the word will have a direct impact on how many people attend. If you have a targeted group of potential attendees (i.e. students, faculty, and University donors) it may be easier to spread the word and make them aware of the event. If your event involves selling tickets or marketing to the general public, your marketing strategy becomes even more critical. It is a very competitive community and people's lives are very busy. You will need to ensure that you have thought through a comprehensive marketing strategy that can be started well in advance of your event. This strategy should also include contingency plans should your attendance be low.

Step 8 ► **Implement and Manage the Process**

While the Event Workplan will identify the tasks/timelines it is still very important that there is ongoing communication among the Planning Committee. A meeting schedule should be developed as early on in the planning process as possible (including a post-event wrap up meeting). All meetings should have an agenda to ensure that all issues are raised. The meetings will provide a good opportunity to review the Event Workplan to ensure that everything is on track and make adjustments or develop contingency plans for those areas that are behind schedule. A communication system and decision-making process for issues that arise outside of the meetings should also be established at the beginning of your planning process. Committee members will need to know what individual authority they have and the necessary approval process for event-related decisions.

Step 9 ► **Hold the Event**

The big day has arrived. Enjoy the results of all your hard work!

Step 10 ► **Evaluate and Celebrate Your Success**

Remember to evaluate your event and the activities. You will want to ensure that you have developed your evaluation process prior to the event. You will need to think about who should participate in the evaluation (i.e. attendees, sponsors, suppliers) and what should be evaluated. Answers to these questions will help you determine the best way of conducting the evaluation. You could use a formal evaluation system like a survey or a focus group, or you could simply have members of your committee ask participants informal questions during the event. Whichever way you proceed, the evaluation will give you invaluable information about your event. Make sure you conduct the evaluation right after the event, while the details are fresh.

Section 1 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ What is the vision and purpose of our event? ▪ Is an event the best way to achieve your objective? ▪ What will the event look like? ▪ Are there things we can do to make this event unique and different? ▪ When is the best time to hold this event? ▪ What else is scheduled at the University or in the community that will impact this scheduling? ▪ How many people do we want/need to attend? ▪ Is there an appropriate site available for our event? ▪ How much money will the event cost? ▪ How much money is available and where will it come from? ▪ Do we have the necessary resources (staff and volunteers) to plan and manage the event? ▪ What are the implications of the time spent on event planning rather than on regular job/department functions? 	
In the Tool Kit	
1.1	Event Attendance Request Form
Resources	
Internal	External
<p>UVic Room Bookings: 721.7587</p> <p>Internal Events Calendar: http://web.uvic.ca/ceremony/events/calendar.php</p> <p>Public Event Calendar: http://events.uvic.ca/index.php</p> <p>10 Year Calendar: http://www.uvic.ca/universitysecretary/dates/#section0-2</p> <p>Venues:</p> <ul style="list-style-type: none"> • University Club • UVSS – Michel Pujol Room; Upper Lounge • GSS – Ida Halpern Centre 	<p>Tourism Victoria (www.tourismvictoria.com)</p> <p>Greater Victoria Chamber of Commerce (250.383-7191)</p> <p>Hotels and Major Venues</p>

Section 2

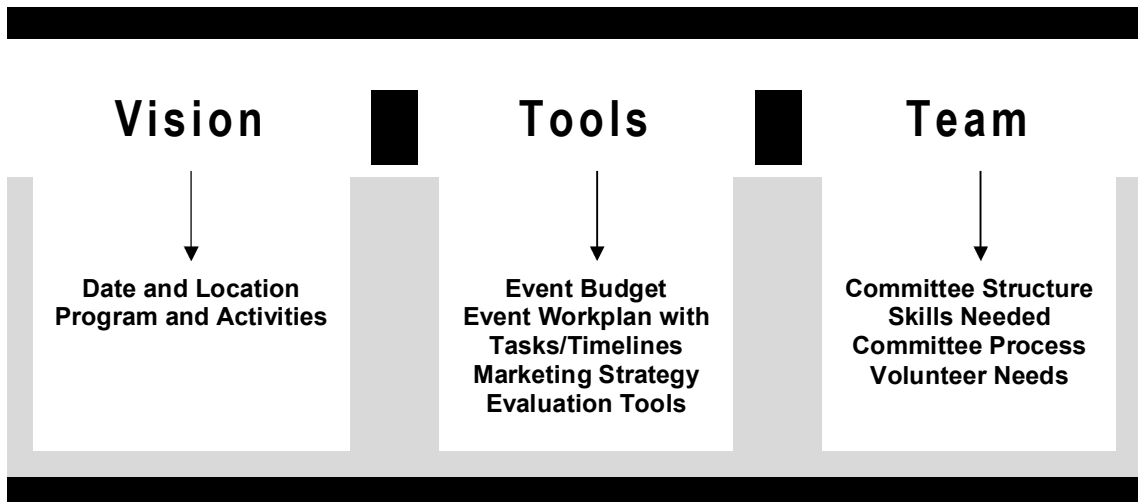
Planning Your Event

Why Plan?

Once you have decided that you do want to proceed with the event, you will need to move forward with the planning process as quickly as possible. As mentioned, effective planning is critical to the success of your event and is not a step to be overlooked. It will allow you and the Committee to:

- have a shared vision of what the event will look like;
- identify the event logistics (who, what, when, where, why);
- develop a marketing and communications plan;
- identify the expenses related to holding the event;
- allow you to determine if you will need to seek sponsorship;
- Determine the resources required to manage the planning process and the event itself.

The planning process will force you (and/or your Planning Committee) to think through all areas of the event. As a part of this planning, you will be able to create three things necessary for event success.



Vision

- ▶ Date and Location
 - ▶ Program and Activities
-

▶ Date and Location

Finding a date and time that is suitable for your event is always challenging. Try to find out as much as you can about what is happening in the University or in the community and plan your event accordingly.

If appropriate, identify key personnel from the University for your event. Once you have decided on a date and determined what University staff are pivotal to your event, make sure these people are notified, so that they can include it in their *Corporate Time*. If it is not a suitable date for these people then alternative dates may have to come into play.

▶ Program and Activities

Careful thought will need to be given to developing your program and agenda. It is the program itself which provides the substance of your event and the reason that people will attend. Program development will have a major impact on:

- the length of your planning period (lead time required for speakers and dignitaries);
- budget (speaker fees and expenses, entertainment costs);
- overall event appeal to potential guests.

You will want to focus on the key elements (i.e. ribbon cutting, keynote speech) and build your other activities around those key elements.

When developing your program you will need to ensure that all appropriate individuals have an opportunity to say a few words (i.e. University dignitaries, politicians, sponsors, etc.). While speeches are a necessary part of formal ceremonies, you will want to minimize the formalities as much as possible and work to keep your program engaging for attendees.

You will want to consider if entertainment or other activities should be included in the program. Additionally, if food and beverage service is a consideration, you will want to ensure that you have allowed the appropriate time in your overall program planning.

Because of its importance and impact on so many other project areas, program development often warrants a separate sub-committee and should be started as early in the planning process as possible.

Tools

- ▶ Event Budget
- ▶ Event Workplan with Tasks/Timelines
- ▶ Marketing Strategy
- ▶ Evaluation Tools

▶ Event Budget

The amount of money available for your event will largely determine the kinds of preparations you make. Before arranging for travel, catering, printing, and other expenses, it is wise to write an event budget that includes all anticipated expenditures. Unless you have received a firm commitment of unlimited funding, make at least two versions of the budget, one ideal and one that reflects the bare minimum that could be spent. Determining a range of prices for each expense in advance will help you to do the most with the funds you have and avoid any miscommunication. There are key expense areas you will need to think about to include in your budget. These include:

- Marketing (brochures, posters, flyers, website, direct advertising)
- Program (speakers fees and expenses, speaker gifts)
- Site Logistics (food and beverage, audio visual, signage, décor)
- Administration (meeting expense, long distance, courier, photocopying, volunteer gifts, staff expenses)

▶ Event Workplan with Tasks/Timelines

Your Event Workplan should cover all details of the planning process and designate responsibility for different tasks. Taking the time to develop a workplan at the outset will help your group stay organized and focused. This document will also force you to address issues that you should keep in mind while planning your event. You will want to include the following in your workplan:

- A brief description of the project/event
- Dates for the planning period
- Goals and objective of event (concrete things that this specific event will accomplish by its end)
- Detailed tasks/timelines broken down by project or Committee areas (i.e. sponsorship, marketing, site management, etc.) outlining what task needs to be completed, by when and by whom
- Timelines and dates for each of the identified tasks indicating who will be responsible

▶ Marketing Strategy

Marketing and communications is critical to ensuring you have people attend your event. You may have a highly attractive event but if people are not aware of it, or find out about it too late to adjust their schedules, poor attendance will minimize your hard work.

You will want to ensure that you have clearly thought out a comprehensive marketing strategy that identifies a variety of promotional tools and techniques. The costs associated with these promotional activities can have a significant impact on your budget and should be a consideration during the budget planning process.

A good marketing and communications plan usually requires a lot of lead time. Even if the event is by invitation only, there is still considerable time required to have the invitations printed, distribution lists compiled and the mail out prepared.

You will want to think about whether or not there is a role for the media in your event. If you are marketing to the general public, you may want to consider some form of media sponsorship during the planning stages.

No matter how simple or complex your marketing plan is, you will want to ensure that you and the Planning Committee review it regularly to ensure you are doing all the activities outlined in the strategy.

► Evaluation Tools

As previously mentioned, it is important that you evaluate the event as quickly as possible while ideas are still fresh in people's minds. You should consider your evaluation strategy as part of the planning process to ensure you have the appropriate tools in place as soon as the event is complete. There are a variety of evaluation tools and methodologies that can be used, ranging from an informal verbal evaluation at the event, to a comprehensive written evaluation post event. The most appropriate evaluation tools will be very dependent on the nature and potential continuance of your event, and the type of attendees your event attracted.

As part of the planning process, you will want to determine the evaluation criteria and who should be asked to participate in the evaluation. You will want to keep your evaluations brief and concise. You only need people to comment on details that provide useful feedback for future planning. Apart from event attendees you may also want to ask sponsors, members of the Planning Committee and/or volunteers for an event evaluation.

Once evaluations are received, they should be consolidated into a report which provides useful feedback for your event stakeholders as well as a tool for future planning, if applicable.

Team

- ▶ Committee Structure
- ▶ Skills Needed
- ▶ Committee Process
- ▶ Volunteer Needs

▶ Committee Structure

The Chair or Committee Coordinator is critical to the success of the event. He/she will have to make all final decisions and solve any conflict. The size of the Planning Committee will very much depend on the nature and complexity of the event you are organizing. Many departments feel totally comfortable handling the event with one or two staff resources while other events require large Committees with several Sub-Committees and a bank of volunteers. There is a fine balance in terms of how many Committee members you will require. You want to ensure there are enough members to have a fair distribution of the workload while still ensuring that no committee member is underutilized. In recruiting your committee members, you will want to ensure the expectations and commitments are clearly laid out. You will want to ensure that the committee members have the necessary skills and knowledge or that there is sufficient time for them to be trained to fulfill their tasks for the event. Each committee member should be given specific tasks to perform and, where possible, a job description outlining the expectations so they are aware of their responsibilities and will feel comfortable with the tasks required of them.

▶ Skills Needed

As part of the planning process, you will be able to identify where specialized skills are required (i.e. marketing skills, media, volunteer management, etc.). You will want to ensure you have addressed these skill areas and invited appropriate team members to the Committee.

▶ Committee Process

Regular meetings and communication between members of the Planning Committee and the Chair/Coordinator are essential. The best means of communication should be discussed by the Committee early in the process. For example, can some decisions be made via email? Are conference calls an option as opposed to face-to-face meetings? Whichever is determined to be the best means of communicating, it is important that a schedule be put in place early. It is during these meetings that the little things that make an ordinary event into a great event come to fruition. It is also during these meetings that the Committee is able to identify what is 'off track' and what corrective action needs to be taken. Outside of the regularly scheduled meetings, the Chair or Coordinator should stay in touch with individual Committee members to provide support to the process or help address any concerns before they arise.

► Volunteer Needs

While volunteer recruitment will be an ongoing process as you move closer to event, it is wise, however, to start thinking about volunteer recruitment at the beginning of the planning process. Specifically, you will want to think about how you will recruit your volunteers and if your needs will be great enough to require a dedicated committee member in charge of volunteer recruitment and management. You will also need to think about the budget implications of volunteer involvement in terms of uniforms or specialized name tags, food and beverage for event day, and volunteer recognition. See Section 8 – Volunteers – for more information.

Section 2 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ Will we require a Committee to help manage the event and if so, what skills do we need? ▪ How often will the Committee need to meet? Where? When? How? ▪ Where will we be able to recruit Committee members? ▪ Do we have a clear outline of our expectations for Committee members? ▪ Have we established a communications system and decision making process for the Committee? ▪ Have we thought through each project area when developing our Event Workplan? ▪ Is our workplan realistic in terms of deliverables and due dates? ▪ Does our workplan contain milestone dates and contingency plans? ▪ Have we identified all project expenses? ▪ Does our budget include various revenue projections in terms of sponsorship and/or attendance? ▪ Do we require volunteers? How many? How/when will they be recruited? 	
In the Tool Kit	
2.1	Sample Event Workplans 2.1 (a) Workplan - Awards Event 2.1 (b) Workplan - Building Opening/Naming Checklist - Building Opening/Naming 2.1 (c) Workplan - Conference
2.2	Sample Budget
2.3	Sample Committee Organizational Chart

Section 3

Sponsorship

Once you have developed your event budget, you will have a better understanding as to whether you need to pursue sponsorship for your event to ensure its financial viability or overall success. There are two basic types of sponsorship:

<h3>Cash Sponsorship</h3>	
<ul style="list-style-type: none"> ○ <i>Increases Revenue</i> 	<p>Cash received for event profile or other mutually agreed upon benefits.</p>
<h3>In-Kind Sponsorship</h3>	
<ul style="list-style-type: none"> ○ <i>Decreases Expenses</i> ○ <i>Creates Value Added</i> 	<p>The contribution of goods or services that will reduce your budgeted event expenses.</p> <p>The contribution of goods, services or resources that will enhance the overall quality of your event, but not necessarily decrease event expenses.</p>

Securing sponsors for any type of project can be an intimidating process. Remember, while you are asking for something, you are also offering some form of benefit in return. You are not asking for a donation only. Many businesses and organizations have a budgeted amount of operating dollars set aside each year just for sponsorship which is viewed as a marketing expense. If your event either matches their corporate mandate or appeals to their customer target market, they are more than happy to hear from you. Remember, you are not begging for charity.

► Develop Your Sponsorship Structure

You will want to spend some time planning your sponsorship structure and approach. You will need to be clear in terms of what your needs are and what benefits you are prepared to offer your potential sponsors. For example, the profile a sponsor who provides \$3,000 in cash sponsorship would be very different from a florist who may be giving you a 50% discount as a form of sponsorship. While both are beneficial contributions, the profile must fit the contribution. It is better to think this through early in the process before you start receiving requests. You can be creative in how you structure your sponsorship program. The structure will greatly depend on the number of prospects you think might be interested in being associated with the event and their available resources.

When building your sponsorship structure, you will need to do three things:

Step 1: Determine Your Needs

You will want to have a good understanding of what it is you actually need for your event. Is it essential that you obtain cash sponsorship to pay the bills? Are there other ways you could offset expenses through in-kind sponsorship?

Step 2: Develop the Sponsorship Structure

Once your event sponsorship needs are determined, you need to review sponsorship agreements (i.e. Strategic Alliances) that currently exist with the university. Contact the Business and Corporate Relations Office for information on Strategic Alliances and clear all contacts through the Daisy Database.

You will need to examine how extensive your needs are and identify what makes sense in terms of the number of sponsors and the level at which they contribute. You will also want to think about your marketing plan and the extent of the sponsor profile you can offer prospects. You will need to determine how many sponsors you can profile while still ensuring individual sponsor benefit. Further, you will want to consider whether or not you are prepared to offer exclusivity to your sponsors where only one sponsor per business type is included (i.e. banking, retail, etc.). Be careful regarding how many in-kind sponsors you allow for. In-kind sponsorship for already budgeted expenses can have a positive financial impact however the inclusion of in-kind sponsors with 'add-on' products or services adds to the number of sponsors that need to be profiled. In-kind sponsors, that do not offset budgeted expenditures, can make for a great event but they don't pay the bills.

Step 3: Identify the Benefits for Each Level

Determine what you can offer your potential sponsors. Try and determine what is important to them and structure your package accordingly. For example, some sponsors are primarily interested in logo recognition while others like to have a personal presence at the event itself. Some benefits you may want to consider for your sponsors include:

- Logo recognition on all promotion and advertising
- Free event tickets
- Opportunity for a display table; banner or sampling opportunities at event
- A speaking opportunity at the event

Step 4: **Create a Prospect List and Determine Approach**

Sponsor acquisition requires a strategy. A big part of that strategy is in knowing who to approach. Start by creating a list of companies or individuals who your department/faculty is involved with or who is supportive of your activities. Look at the nature of your event and who will be attending. Are there companies whose customers reflect the same event attendees? Once you have created your prospect list you will want to think about the best way to approach them. Typically, sponsorship packages are forwarded in a written hardcopy format. Online communication is only appropriate if you already have an existing relationship with the prospect and have spoken with them in advance to advise the package is being forwarded.

Often successful sponsor negotiations are a result of personal contacts. You may want to find out if there is anyone in your department or on your Planning Committee who has an existing relationship with the sponsor prospect. Remember to allow plenty of lead time when planning your prospect list and approach. Successful sponsor relationships can take quite some time as there are often many levels of approval to go through.

Step 5: **Prepare a Sponsorship Package**

As part of that strategy you will want to ensure that you have a sponsorship package that not only provides all the details but sells the event and sells the opportunity. When writing your request, bear in mind that your sponsor prospects are extremely busy and receive numerous requests. You will want to avoid information overload. Often three to five pages is more than enough with supporting brochures or pamphlets. You will want to ensure you have included the following in your package:

- Background information on the event and the University
- Event details (who, what, when, where, why)
- Sponsorship opportunities (levels of involvement)
- Sponsorship benefits

Sponsors are interested in how many sponsors will potentially be involved with the event to ensure their presence will stand out and be noticed. They may also be concerned with whether or not you are offering exclusivity within a business sector.

Step 6: **Conduct Follow Up**

Follow up should be done with potential sponsor approximately a week after sending out the package. Depending on the level of request, the best approach may be to book an appointment to review the proposal. Do not be discouraged if the sponsor prospect does not initially remember all the details of your event. Remember, they are busy people and receive numerous requests.

Step 7: **Keep Your Sponsors Involved**

Once you have secured your sponsors, you will want to ensure that you keep them informed as to what is happening with the event. You may even want to consider inviting your sponsors to participate on your Planning Committee. Either way, you will want to keep them informed and keep them engaged. They truly are partners in your event and in your success.

Section 3 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ Have we identified existing Strategic Alliances to avoid conflict? ▪ Have we cleared our sponsor prospects through the Development Officer? ▪ What are our needs in terms of sponsorship? ▪ How many levels of sponsorship will we have? ▪ What are we prepared to offer for each level and is there equity in how we have structured the benefits? ▪ Who would receive benefit by being affiliated with our event? ▪ How should we approach them (i.e. letter, phone call, personal visit)? ▪ Have we followed up in writing with our sponsors to confirm all agreed upon details? ▪ What systems do we have in place to keep our sponsors involved and informed? 	
In the Tool Kit	
3.1	Sample Sponsorship Package
Resources	
Internal	External
Strategic Alliances: Business & Corporate Relations Department	

Section 4

Program Development

Creating the Agenda

Careful thought will need to be given to developing your program and agenda. It is the program itself which provides the substance of your event and the reason that people will attend. No matter what type of event you are planning, you will need to consider the four elements in your program development:

- ▶ Arrival and/or Registration
- ▶ Mandatory Elements
- ▶ Supplemental Activities
- ▶ Breaks, Receptions and/or Meals

▶ Arrival and/or Registration

The nature of your event will dictate how early people should arrive. If there is no formal registration process, nametags or handouts, you will only require a minimal amount of time prior to the start of the formal program (approximately 15 minutes). If you are hosting a larger event, you will require more time to allow for registration and payments, if applicable.

It is not wise to start any formal elements of your program without some arrival time built into your program; however it is critically important to start your program at the time advertised.

▶ Mandatory Elements

These are the core offerings of your event. It may be speeches and a ribbon cutting or include a series of workshops and a keynote presenter. You should start your program development by identifying a list of the key elements that must be included in the event and allocating the time required. This will give you a better sense as to how much time is available for other activities. Make sure that you have reviewed any sponsorship agreements to ensure there is a speaking opportunity for key sponsors if this was in their agreement.

While speeches are a necessary part of formal ceremonies, you will want to minimize the formalities as much as possible and work to keep your program engaging for attendees.

► Supplemental Activities

Additional activities and interesting programming can greatly enhance your event; however, these additional elements are conditional upon the availability of time. You need to properly assess the timing associated with your mandatory elements first before you start looking at add-ons. Supplemental activities can be included before or after your formal program. In some cases, an additional activity or presentation is interspersed in the middle of the program to provide additional interest and a break from podium speakers. Supplemental activities can include:

- Exhibits
- Displays
- Demonstrations
- Entertainment
- Site Tours
- Multi-Media Presentations

► Receptions, Breaks and/or Meals

Depending on the nature of your event, you may need to look at including meals or nutrition breaks. If this is the case, you will want to ensure you have allowed enough time for attendees and guests to move between rooms or venues as well as having some personal break time, particularly if it is a full day event.

For events that only span the course of a couple of hours, a reception either prior to or following the event can enhance the overall impact and provide additional time for socializing and networking. Reception foods could be as light as tea/coffee/juice and light offerings. For an evening event, you may want to look at a nicer and bit more substantial type of appetizer.

If you plan on having speakers during a lunch or dinner, you will want to ensure you built your schedule around the food service timing. You will want to make sure the meal has finished and the main course dishes cleared before your speakers begin. A preset dessert can go a long way to help move the process along.

Speaker Selection

The speakers have a critical impact on the tone, content, and overall success of any event. The message they convey and how they convey it is almost of equal importance. Speakers may have very different roles and purpose in an event. Accordingly, the criteria for their selection may be quite different. For example, an emcee for a youth-oriented event would be very different from a keynote speaker for a highly technical conference. The chart on the following page outlines details around the various types of speakers or presenters you may want to incorporate into your event.

Emcee	Purpose	<ul style="list-style-type: none"> ▪ Maintains flow of program and keeps it on schedule ▪ Sets the tone - makes guests feel comfortable ▪ Introduces speakers
	Selection Criteria	<ul style="list-style-type: none"> ▪ Relationship with Faculty/Department/University ▪ Excellent presentation skills ▪ Ability to move things along in a pleasant (and possibly diplomatic) way ▪ Ability to think quickly on feet
	Type of Event	<ul style="list-style-type: none"> ▪ Used for all types of events
	Usual Timing	<ul style="list-style-type: none"> ▪ Is engaged for entire event
	Costs	<ul style="list-style-type: none"> ▪ Usually no fee
Sponsors & Dignitaries	Purpose	<ul style="list-style-type: none"> ▪ Official remarks on behalf of designated agency (i.e. University, sponsor, government)
	Selection Criteria	<ul style="list-style-type: none"> ▪ Senior level representative of organization ▪ Ideally, good presentation skills
	Type of Event	<ul style="list-style-type: none"> ▪ Used for all types of event
	Usual Timing	<ul style="list-style-type: none"> ▪ 2 – 3 minutes
	Costs	<ul style="list-style-type: none"> ▪ No costs involved
Keynote Speakers	Purpose	<ul style="list-style-type: none"> ▪ Usually the highlight and featured speaker of any event ▪ Has a specific message and/or purpose (i.e. educate, motivate) ▪ Is often a strong marketing draw for attendance and/or ticket sales
	Selection Criteria	<ul style="list-style-type: none"> ▪ Outstanding presentation skills and/or high level of technical expertise
	Type of Event	<ul style="list-style-type: none"> ▪ Primarily used for conferences and major special events
	Usual Timing	<ul style="list-style-type: none"> ▪ Typically 20 to 30 minutes
	Costs	<ul style="list-style-type: none"> ▪ Fee for service plus expenses. Can be quite costly (anywhere from \$1K - \$10K)
Workshop Facilitators	Purpose	<ul style="list-style-type: none"> ▪ Presents very skill specific training or facilitates group discussions
	Selection Criteria	<ul style="list-style-type: none"> ▪ Should have strong training and facilitation skills ▪ Should have recognized level of expertise in topic area
	Type of Event	<ul style="list-style-type: none"> ▪ Used for conferences and symposiums
	Usual Timing	<ul style="list-style-type: none"> ▪ Anywhere from 45 minutes to 3 hours
	Costs	<ul style="list-style-type: none"> ▪ Usually fees and expenses - \$100 to \$500 per session
Guest Speakers	Purpose	<ul style="list-style-type: none"> ▪ Makes special presentations or speaks on behalf of a specific topic, group or organization (i.e. First Nations, Alumni, etc.)
	Selection Criteria	<ul style="list-style-type: none"> ▪ Strong connection to organization or topic area
	Type of Event	<ul style="list-style-type: none"> ▪ Used for all types of events
	Usual Timing	<ul style="list-style-type: none"> ▪ Typically 2 to 15 minutes
	Costs	<ul style="list-style-type: none"> ▪ Often minimal cost or honorarium only, however, expenses should be covered,

As noted above, fees and expenses for speakers are very diverse. Creating an effective program will be a fine balance between available options and available budget. You need to determine what is most critical for your event's success and allocate your dollars accordingly. A personal 'ask' from someone that knows the speaker personally often helps open the door for discussion around fees. Even if a speaker is paid, you will want to identify gifts that can be presented to your program participants. It need not be anything elaborate and often something that has a connection to the event itself is appreciated.

Contingency planning should also be part of your program planning. While it does not happen often, you will want to have options available on the chance that someone is ill or has to cancel for some unforeseen reason at the last minute.

Managing the Relationship

Keynote Speakers, Guest Speakers, Workshop Facilitators

- ▶ **Confirm in Writing** - Ensure that all specific details of the event have been confirmed in writing. If there are speaker fees involved, it is wise to ask for a signed returned copy of the agreement. In the case of high profile speakers or guests, you may want to confirm their availability to participate in media interviews prior to the event.

- ▶ **Obtain Audio Visual Requirements and Bio** – Some speakers have very specific requirements regarding the type of equipment they are most comfortable with. You will need to make sure you have confirmed all audio visual requirements with speakers well in advance of the event so that you can have the appropriate equipment ordered and the room set prior to the event. On campus, all AV must be booked through University Systems. It is usually problematic, and sometimes impossible, to make changes the day of the event. You will also want to ensure you have a brief biography from the speaker for introduction purposes. It is far better to receive the bio from them directly rather than creating something yourself which may not truly be accurate or in line with the way they like to be represented. Depending on the nature of your event, you may also want to obtain a picture of key speakers to use in promotional materials.

- ▶ **Conduct On-Site Briefing Event Day** – Ensure you ask speakers to arrive at your event early. This will give you an opportunity to do a site visit with them and ensure they are comfortable with the venue set up and audio visual equipment. It is also an opportunity to review any last minute details and answer any final questions they may have.

- ▶ **Post-Event Follow Up** – Make sure you take the time to formally thank all parties involved in the event (See Section 9). Keynote speakers, workshop presenters or facilitators are often interested in the feedback you receive relative to their presentation so it is wise to be prepared as to how you want to handle this.

Managing the Relationship Emcee, Dignitaries and Sponsors

Emcee:

- ▶ Confirm in writing the date, time, purpose of the event and the anticipated audience.
- ▶ Provide a detailed script that includes everything the emcee is to say. Be sure to include the phonetic spelling of names, if required.
- ▶ Email the script to emcee so he/she can adjust the font size/format to their liking.
- ▶ Bring additional copies of the script to the event.
- ▶ Ask the emcee to arrive 15-20 minutes early to review last minute changes.

Dignitaries and Sponsors:

- ▶ Confirm in writing the date, time and purpose of the event.
- ▶ Forward the RSVP list of confirmed attendees.
- ▶ Provide a detailed Order of Proceedings to identify where they fit in the overall program.
- ▶ Provide suggested speaking bullets to lessen the chance of all speakers saying the same thing.
- ▶ Plan a dignitary/sponsor pre-event briefing to review Order of Proceedings, seating plan, etc. 15 minutes prior to the start of the event.

Section 4 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ Have we identified all of the mandatory elements of our program? ▪ Is there time for supplemental activities? Will they enhance the overall event? ▪ Is our program interesting, engaging and informative? ▪ How much time do we need to factor in for guest/participant arrivals? ▪ Have we built in appropriate time for socializing and/or networking? ▪ Have we built in time for guests/participants to move between rooms or venues (if applicable)? ▪ In the case of meals, have we checked with our caterer to ensure we have the necessary time for food service and our program? ▪ What is our budget for speakers? What are the most critical items that need to be covered within this budget? ▪ Who will be involved in the speaker selection process? Do we need to go out for tender? ▪ Have we built time into the program for sponsor remarks (if applicable)? ▪ Have we confirmed the availability of appropriate University dignitaries? ▪ Have we confirmed all speakers in writing? ▪ Do we know the speakers A/V requirements? Do we have a bio/picture? ▪ Have we designated someone to take care of picking up our speaker(s) from the airport if they are arriving from out of town? ▪ Do we have a back up or contingency plan for speakers who may have to cancel? ▪ Do we need to prepare speaking notes? Who needs to provide approval or sign off on these notes? ▪ Who will be responsible for greeting the speakers upon arrival at the event? ▪ Do we have enough speakers to warrant a pre-arranged 'Dignitaries Meeting' prior to the event? ▪ Have we made sure to factor in time and budget for speaker gifts? 	
In the Tool Kit	
4.1	Speakers Agreement Template
Resources	
Internal	External
<p>AV Resources: http://web.uvic.ca/mediaservices/</p> <p>Housing, Food and Conference Services: http://unfs.uvic.ca/catering/</p> <p>University Club: http://club.uvic.ca/</p>	

Section 5

Marketing and Promotion

The key to hosting a successful event is to promote it well. You can put in all the time and raise all the necessary money to host the event, but if no one knows about it, attendance will be low. If you plan on inviting the public to the event, it is wise to promote it as much as possible and make use of every available marketing and publicity resource.

Developing a Marketing Plan

Your marketing plan is an integral part of your overall project plan. In addition to being one of the most costly event expenses, marketing and promotion requires a great deal of time and focused attention. The key is to have a clear understanding upfront as to how you are going to promote and advertise your event.

There are many steps involved with the preparation of your marketing materials so you will need to ensure you start the process very early. Depending on the nature of your event, you will want to have invitations mailed or marketing materials distributed at least four to six weeks prior to your event. Additionally, you will need to allow for development, design and printing time in your timeline.

Your marketing plan will allow you to think through your advertising and promotion strategy. The key is to include as many marketing and promotional activities as possible however you want to ensure they are strategic and directed to the appropriate market. Your plan should answer the following questions:

Who is your target market?	<ul style="list-style-type: none"> ▪ Who will attend the event? ▪ Who should be included on the invitation list? ▪ How much will they pay (if applicable)?
How will you best reach them?	<ul style="list-style-type: none"> ▪ What advertising, marketing and promotional activities will best attract your target market? ▪ What tools will be used? How often? ▪ When will the marketing start?
How much will the promotion cost?	<ul style="list-style-type: none"> ▪ Are all associated costs identified in the budget? Are they realistic and available?
What resources are required?	<ul style="list-style-type: none"> ▪ Who will be involved in the development of the marketing materials?

Do you need to engage the media?	<ul style="list-style-type: none"> ▪ If so, how will you engage them? Will you need to explore sponsorship? ▪ Who from your committee or the University will handle media interviews?
What will you do if attendance is low?	<ul style="list-style-type: none"> ▪ Are there back up strategies in place in the case of low attendance? When would you consider cancelling the event?

Marketing and Promotional Tools

There are numerous ways to promote your event. The key is to identify which work bests and falls within the scope of your available budget and available resources. Some advertising and promotional tools you may want to consider include:

DIRECT ADVERTISING	DIRECT SALES
<ul style="list-style-type: none"> ▪ Posters ▪ Brochures ▪ Flyers ▪ Newspaper advertising (paid & sponsored) ▪ Radio/television ads ▪ University calendar/publications ▪ Magazines ▪ Signage 	<ul style="list-style-type: none"> ▪ Printed invitation ▪ Personalized letter of invitation ▪ Web site ▪ Email bulletin (list serves) ▪ Email footers (sponsors, committee members)
GENERAL PROMOTION	MEDIA PROMOTION
<ul style="list-style-type: none"> ▪ Newsletters (community-wide) ▪ Partnership promotion with sponsors ▪ Public displays ▪ Promotion through internal University groups (i.e. Student Groups, Faculty, Alumni) ▪ Promotion through external groups (i.e. service clubs, chambers) ▪ Promotion at other University events ▪ Word-of-mouth ▪ Bulk ticket sales to associations and other institutions (group rates) 	<ul style="list-style-type: none"> ▪ Media sponsor promotion (i.e. contests, web links) ▪ Media interviews ▪ Public Service Announcements ▪ Calendars of events ▪ Speaker profiles (editorial)

Everyone is looking for new and creative ways to promote but effective marketing is purely a case of doing all the things all the time. Remember that your marketing and promotion efforts are part of an integrated strategy and each activity must be completed. It is often easy to lose sight of some promotional activities as the pressures of site management become more time consuming, however, once you lose sight of the marketing focus, it is difficult to take corrective measures close to the event. Effective advertising, marketing and promotion are a function of timing.

Engaging the Media

University Communications is the main contact between the media and the university. Be sure to forward details about your event to them very early in the process to ensure they are aware of it. They will determine their level of involvement with your event. If they are unable to support the event, the following provides an overview of the steps to take for media coverage.

The media can be a huge ally for your event and have a significant impact on the overall promotion. Even if you are not selling tickets or seeking general public attendance, they can make the community aware of your event and create additional profile opportunities. There are several ways you can engage them:

- ▶ **Media Release** A brief 1 page document that outlines the who, what, when, where and why of your event as well as a contact name and phone number for follow up. Media releases are often considered 'news' as compared to community information.

- ▶ **PSA's** Public Service Announcements are free advertising that media outlets offer to groups (other than private sector) to help promote activities or events.

- ▶ **Event Coverage** A picture/story says 1,000 words. Having the media attend your event and provide coverage of the activities is one of the best forms of advertising you can have for future events.

- ▶ **Post Event Profile** While many organizations focus on media coverage prior to the event, you will also want to share the success and 'good news' story post-event. A picture always helps the chances of having your info included in the publication.

Dealing with the media can be a challenging process. They are inundated with requests for coverage and promotion. It is a very competitive market and you need to find unique and creative ways to stand out. The media spend the majority of their time 'getting the story'. The easier you make it for them, the more likely they are to support your initiatives, particularly if your communication is well organized and newsworthy. There has to be a strong message and most importantly it has to be relevant. The following are some tips for working with your media outlets:

- Contact all media in your community – ensure you have appropriate contacts
- Make sure your story is newsworthy
- Ensure all media releases are dated
- Provide as much background as possible, either in person or in an attachment (but not in your media release)
- Follow up by telephone after each media release or media kit mailing
- Promptly return calls from the media and provide information in a timely fashion
- Be flexible with media releases. If a reporter asks for information ahead of time, provide it but ask him/her to respect the issue date
- Be concise in your responses during an interview
- Send thank you cards to all your media contacts

Section 5 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ Have we forwarded event details to University Communications to determine their ability to support the event? ▪ Do we know who our target market is to attend the event? ▪ Do we know how to best reach them? ▪ Is an invitation list already developed? ▪ What is our advertising and promotion budget? ▪ Is our marketing plan diverse and wide-reaching? Have we explored all opportunities for promotion? ▪ Do we have a clear and realistic outline of deadlines for print materials and media? ▪ Have we profiled all sponsors appropriately in our marketing materials? Do we have the current logos? ▪ Will we require media sponsorship? ▪ What is 'the story' for the media? ▪ Who will be responsible for media interviews? 	
In the Tool Kit	
5.1	Sample Marketing Plan
Resources	
Internal	External
University Communications: http://communications.uvic.ca/index.php University of Victoria Graphics: http://external.uvic.ca/marketing/graphics/	

Section 6

Site Logistics

During your event and program planning you would have made decisions regarding the type of venue that was required and review considerations for your venue layout. Site logistics deals with all of the details associated with what actually happens within your venue(s) on event day. It is the execution of all of your planning and will have the greatest impact on your overall event success. Even well-attended events with high calibre presenters will fail if there are problems with timing, equipment, venue comfort or food. Successful events are the result of precisely planned, well executed strategies and always being prepared for the unexpected.

Site Suppliers

Site logistics involves relationships with a variety of internal or external suppliers including (but not limited to) audio visual suppliers, lighting specialists, décor companies, florists, caterers, and sign makers. Naturally there is also the relationship with your venue. Pricing quotes and contracts are a major component of successful relationships with each of these suppliers. You will want to ensure that each quote properly covers all items discussed and that the price falls within your budget.

For expenses over \$2,500, a formal RFP process is required. This can be done online through the University of Victoria Purchasing website. The more detail that can be provided at the outset of this process, the easier it will be. If you are only selecting one supplier, a Business Firm Retainer Form and a Sole/Single Source Provider Form must be completed.

Contracts should be reviewed in detail to ensure that all information is as agreed to. It is particularly important to ensure the details related to set up and tear down are accurate. Contracts should be reviewed a second time just prior to the event to ensure all information is still current. Often details change as you move through the planning stage of an event. If your contracts and/or work orders are not changed to properly reflect these modifications, it can create problems for the event itself and/or for the billing. Often the people responsible for setting up your event are not the same people involved in the original negotiations. The work order or contract becomes the key document driving event set up and you need to ensure it is accurate and up to date.

Contingency Planning

A major part of successful event management is contingency planning. While this is important for all areas of your event, it is particularly relevant to site management. You will want to ensure that you have thought through the various aspects of your event and identified contingency plans for each area. For example:

- What will you do if it rains and your event is being held outside?
- In the case of breakout rooms, how will you control overcrowding?
- How are you handling special dietary requests?
- Is there a backup system in the case of power problems?
- What will you do if a large number of people show up unexpectedly?
- How will you make the event location appear full if few people show up?

Site Logistic Considerations

► Room Set Up

The nature of your event and the expected number of guests/attendees will often dictate the type of room set up you use. Theatre style seating is appropriate for short ceremonial type events while 'hands-on' workshops are most successful if round tables are used that allow for the use of course materials and group discussions.

Your room set up should be determined by the following:

- Number of guests/attendees
- Timing (how long will guests/attendees be standing/seated)
- Comfort
- Room capacity
- Activities
- Preference of presenters (if applicable)

For formal sit down events where there is a general session plenary session you will want to make a decision as to whether you want to include a head table as part of your configuration. This decision will greatly depend on the formality of the event and the nature of your dignitaries (i.e. Minister, Board of Governors, etc.).

Once your rooms are set, it is advisable not to change the configuration for the duration of your event, unless absolutely necessary. In a commercial venue, such as a hotel, there are additional labour costs for reconfiguring the room during the event.

▶ **Audio Visual**

Audio visual requirements will depend greatly on the nature of the program and the requirements of the speakers. Minimally you will need a sound system for speakers and/or presenters. This system can also be used to play music for guest arrival or post-event. All sound systems typically have a microphone wired to the podium however, you will want to check with your speakers to see if they prefer a wireless microphone or lavalier (lapel) microphone.

In the case of breakout rooms, you will want to ensure you confirm audio visual requirements with each speaker. All equipment should be checked prior to the event and you will want to ensure you have backup in case of equipment malfunction. You may not necessarily need replacement equipment as long as you have immediate access to a technician.

▶ **Lighting**

Lighting is usually only applicable to evening or performance style events. It is typically quite costly and takes considerable time for set up.

▶ **Décor**

Décor enhances any event and helps set the tone. Options are endless. It is often valuable to explore what is already available thru local suppliers that might help reduce costs. It is important to first determine what you are trying to achieve with your décor plan and what the tone of the event is. Are you trying to dress a specific area? Fill the space? Create a feeling of festivity? Tie into a theme? Your décor should enhance your event not take it over. Once your décor theme has been established you will want to ensure you are consistent throughout.

▶ **Signage**

Signage is an important part of effective traffic flow. You will want to think about directional signage; washroom signage; room identification; parking; etc. A proper site tour will help you think through all relevant areas for signage.

Signage can also be used as an effective piece of décor and for sponsor recognition. A large event sign can not only designate your check in or registration area but makes a very welcoming entrance for your event and an opportunity to draw attention to your key sponsors.

You will need to review your sponsorship agreements to determine if there is any commitment for sponsors to hang their own signage at your event. If so, this will have to be factored into your overall site plan.

► Registration/Reception

Whether there is a formal check-in process or an informal guest arrival area, registration is critical to the success of an event. It is the first introduction to your event and how guests/attendees are handled goes a long way to set the tone. You will want to ensure your registration area is large enough to allow people to line up if necessary and that there is a coat check close by. The registration area should be clearly marked.

If often expedites registration and avoids bottlenecks if there is a separate area for processing guests/attendees that did not pay in advance, if applicable. It is helpful to divide the registration area by alphabetical groupings and ensure the alpha signs are hung overhead rather than at table level, thus preventing them from being hidden by the attendees standing at the registration table.

No matter how you choose to handle registration and guest arrival, it is always valuable to have designated staff or volunteers greeting guests/attendees upon arrival. Apart from welcoming guests to the event, they can also assist by answering any questions and directing traffic flow to avoid congestion and ultimate irritation.

► Food and Beverage

On campus, all F&B must be sourced through Food Services. Events at the University Club are catered by their staff. The nature and length of your event will dictate whether or not you should include refreshments. In the case of formal meals, menu selections should be appealing to a general audience, avoiding any spicy or extreme gourmet options. You will want to ensure you provide guests/attendees with vegetarian options or have the capability of handling special dietary requests. Quantities typically need to be confirmed one week in advance. When confirming your requirements, you will need to balance your known numbers with the estimated number of last minute guests and the estimated number of last minute cancellations. You will be charged based on the number of meals served unless the committed number is higher so you want to ensure you are as accurate as possible. It is important you carefully review your event program to confirm meal service times with your food services supplier and how you want to handle any program delays.

► Photography – Recording

Photography, recording and webcasting are valuable in providing a legacy of your event. Pictures are also an important consideration for sponsors, dignitaries and the media. It is valuable to consider a location for photo opportunities in your site set up. It is advantageous to have event signage that will be prominent in the picture. If you are hiring a professional photographer, ensure you review your program and specific needs with them well in advance.

If you are recording the event, you will need to set aside an appropriate area for the videographer with clear site lines to the presentation area. It is also wise to review

this with your presenters in advance. Apart from being comfortable with the process, some professional speakers have specific conditions related to videotaping. There are strict regulatory procedures in place when webcasting events. Please contact USEC or Ceremonies and Events for advice.

► **Special Needs**

When developing your site plan, you will want to make sure that you have made provisions for individuals with special needs. While the venue may be wheelchair accessible, you will also want to ensure there is stage ramping, if relevant, and that specific parking areas have been allocated.

Depending on the nature of your event, you may want to consider the use of a professional signer for hard of hearing guests. In this case, you will want to ensure your speakers are aware that this is happening.

Event Day Management

Events by their nature are busy and often stressful. By being proactive in thinking through any problems prior to the event you can help ready yourself for any unexpected challenges. There should be one person designated as the site manager who will ultimately take responsibility for the execution of the event. This person should not be assigned to a specific area but rather be free to move throughout the venue as required. The following outlines some tips to help successfully manage your event:

- **Prepare a rollout.** A rollout (a rolling out of the day) is a detailed, itemized listing of what is going to happen hour by hour (or minute by minute) on event day. You will want to prepare your rollout a week prior to the event and circulate it to all people involved in the execution of the event. The rollout reinforces all details regarding arrival and set up times and is an effective management tool for event day. It reinforces what should be happening in all areas. While you are standing beside a stage monitoring activity, it may be easy to forget that food service should be starting in another area of the venue. The rollout acts as your reminder. You will want to ensure that you have included emergency contact phone numbers for all suppliers and key people involved with your event as part of your rollout on the chance there is a problem.
- **Arrive early.** You can go a long way to minimize your stress by arriving early at the event venue. If there are any problems your early arrival will ensure that you have time to make the appropriate changes.
- **Do a complete site inspection prior to the event.** Upon your arrival, the first thing you will want to do is a full site inspection. Make sure this happens before people start pulling your attention to other areas. You will also

want to do a final site visit just prior to the event commencement to ensure everything is in place as it should be.

- ▶ **Ensure you have done an audio visual check.** Your audio visual technicians will typically do a sound check when the equipment is set up however it is valuable to do a second check just prior to the event and familiarize yourself with the controls. If time permits, it is often wise to do a sound check with the speakers before the event begins. All audio visual equipment in breakout rooms should also be checked.
- ▶ **Have a clearly defined communication system.** You will want to ensure you have planned for an effective process of communicating with key staff/volunteers involved with your event. It is important that you are able to communicate with one another. While cell phones may be an option, you might want to consider using walkie talkies for larger events. It is also important to know where key people will be located throughout the event. Who is the contact in case of an emergency and where will they be?
- ▶ **Prioritize.** As previously mentioned events are busy and full of last-minute details. They particularly tend to create stress for staff/volunteers new to events. You will find that you are constantly being pulled in various directions. You will regularly need to prioritize 'the issues' and act accordingly.
- ▶ **Ensure you have the appropriate number of staff and volunteers.** It is important that you have proper resources for each area. It is also wise to have a couple of floaters for unexpected tasks that arise or for areas that need more help than anticipated.
- ▶ **Monitor your event timing.** Stick to your program agenda as closely as possible. It is valuable to monitor the timing of your event and be proactive in dealing with any variances to the agenda. It is beneficial to try and regain any lost time before things get too far off schedule.
- ▶ **Be prepared for the unexpected.** Events by their nature often fall victim to Murphy's Law. While there is little you can do about the unexpected, your best defence is to ensure that you are as prepared and organized as possible. By taking care of the things which are in your control, you free up your time to take care of those issues that arise outside of your control.
- ▶ **Look for your weak links.** Prior to your event, review your event plan and rollout to identify areas where you can anticipate challenges. You will want to ensure you monitor these areas closely and are on hand nearby if needed.

- ▶ **Remain calm.** It is critically important that event organizers and site managers remain calm at all times. If challenges arise with an event, there is a natural tendency for people to become nervous and anxious. The role of the event manager is to remain calm and deal with issues as they arise in the most appropriate manner.

Section 6 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ Have we identified our site suppliers? Do we want to obtain competitive bids? ▪ What will we do in the case of rain and an outdoor event? ▪ Have we thought through all areas of the event, identifying need for contingency plans? ▪ What is our site capacity for guests/attendees? ▪ How will we handle room set up? Are the speakers comfortable with this set up? ▪ Will we have an opportunity to do an audio visual check with our speakers in advance of our program commencement? ▪ How will we handle any technical problems at the event? ▪ Do we have any special lighting or décor requirements and if so, what is the purpose? ▪ When do we have access to the venue for set up? Have we scheduled enough time for the necessary set up? What can be done in advance? ▪ What type of signage is required? What can be created in-house and what needs to be professionally produced? Have we allowed the appropriate time for this? ▪ Is our registration or guest arrival area large enough to avoid any bottlenecks? ▪ Have we designated someone to welcome people to the event and assist by answering questions or directing traffic? ▪ Do we have a clear understanding of our numbers for food and beverage service? ▪ Have we considered a process for tracking any special dietary requests? ▪ Do we want a professional photographer for the event? If so, what areas do we want to focus on? Have we considered an area for sponsor/speaker photographs? ▪ Have we reviewed any plans for visually recording or webcasting the event with speakers? ▪ Have we made considerations for any guests with special needs? ▪ Have we assigned a site manager? ▪ Has a rollout been prepared and circulated to all suppliers and relevant participants? ▪ Do we have enough staff and/or volunteers to handle all site requirements? ▪ Have we identified potential problems and how we are going to handle them? 	
In the Tool Kit	
6.1 6.2	Event Rollout Supplier Listing
Resources	
Internal	External
Classroom Configurations University of Victoria Purchasing Dept: web.finance.uvic.ca/uvicprocurement/2G	

Section 7

Registration

Registration involves the process and procedures you will use to track your guest and/or event attendees. These requirements will vary greatly depending on the nature of your event. In some isolated cases you will not necessarily require any form of registration or pre-response. In most cases, however, you will want to use a formal or informal registration system, as outlined below:

Type	Formal	Informal	No System
Details	<ul style="list-style-type: none"> ▪ Attendees must pre-register for event, preferably in writing. Contact information and other specific registration information must be provided 	<ul style="list-style-type: none"> ▪ Some form of RSVP must be used to control numbers only. Additional details are not required 	<ul style="list-style-type: none"> ▪ No pre-registration or RSVP system required.
Event(s) Used for	<ul style="list-style-type: none"> ▪ Conferences ▪ Workshops ▪ Formal Events ▪ Luncheons or Dinners ▪ All events requiring payment 	<ul style="list-style-type: none"> ▪ Indoor events where space limitations and/or food and beverage considerations 	<ul style="list-style-type: none"> ▪ Open House ▪ Festivals ▪ Demonstrations
Considerations	<ul style="list-style-type: none"> ▪ Space ▪ Food and Beverage ▪ Breakout Rooms ▪ Handouts ▪ Registration Packages ▪ Nametags 	<ul style="list-style-type: none"> ▪ Space ▪ Seating (if applicable) ▪ Food and Beverage 	<ul style="list-style-type: none"> ▪ None
Systems	<ul style="list-style-type: none"> ▪ Written Registration ▪ Email ▪ Online ▪ Phone In (not ideal) 	<ul style="list-style-type: none"> ▪ Phone In ▪ RSVP Card ▪ Email ▪ Online 	<ul style="list-style-type: none"> ▪ None
Information Required	<ul style="list-style-type: none"> ▪ Full Contact information ▪ Event specific information (i.e. workshop selections) ▪ Special meal requests 	<ul style="list-style-type: none"> ▪ Usually name only and/or number of guests 	<ul style="list-style-type: none"> ▪ None

Setting Up Your Registration Systems

You will want to clearly think through the type of information you require from your guests/attendees for all aspects of the event. You will want to make your registration system as user-friendly as possible and only ask for the information that is absolutely needed. For example a conference may require full day/evening contact information as well as workshop selections and payment information while a hosted Awards Program may only require confirmation of a contact phone number and the number of guests attending. It is useful to review the registration database requirements with the entire planning committee to ensure everyone's needs are being met.

In setting up your system you will want to consider how guests/attendees will respond. Is there a central phone number that can be used? Would it be appropriate to have an answering machine on this line or is it necessary for callers to speak with a staff member? Is there an opportunity to set up a web based registration system? You will also want to consider how you are going to handle confirmation of registration. For multiple day conferences or events, it is strongly recommended that a written confirmation system be implemented, particularly if attendees are travelling from out of town.

Site Registration

How your registration and guest arrival system is set up sets the tone for your event. It is the first point of contact at the event for your guests/attendees and you want to ensure it runs as smoothly as possible. People are typically excited and/or anxious upon arrival and should be dealt with in an expedient, friendly and efficient manner.

You will need to ensure you have multiple copies of your registration list. It is also valuable to have registration information available in a variety of formats (i.e. by name, by company etc.) This will help if there is any confusion with a specific name or if there has been a substitution.

You will want to ensure your registration area is well staffed. If payment processing is involved, it is helpful to have two areas – one for guests/attendees that have pre-paid and one for guests who need to register and/or pay.

If name badges are being used, it is helpful to have the badges laid out alphabetically. When preparing name badges, you will want to ensure you use a font that is easy to read and large enough to be read at a distance. You will also want to give consideration to the type of badge used. Pins and sticky backed badges often ruin clothing garments and are not well received.

Monitoring Your Numbers

Registration should be closely monitored. It is particularly relevant when either registration is nearing venue capacity or when registration is so low you may need to consider event cancellation. You should have strategies and contingency plans in place for both of these situations. Specifically, you will want to think through your cancellation policy in advance and have this advertised as part of registration.

Registration is often last minute however you will need lead time to prepare materials for delegates, if applicable, and confirm food and beverage at least 72 hours in advance. Unfortunately there is no magical formula for determining your final head count. You will need to consider your current registration level and balance this with both the number of last minute guests you expect as well as anticipated last minute cancellations or no-shows.

Section 7 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ What type of registration system do we require? What information needs to be tracked? ▪ Have we considered all needs in setting up the registration database? ▪ How will guests/attendees respond or register? ▪ Will we require a formal confirmation system? ▪ Will we require name tags? If so, is the format legible and user friendly? ▪ Are we properly staffed for registration? ▪ Have we set up a system for people to pay at the door? ▪ When do we need to confirm food and beverage numbers? ▪ What is our venue capacity in terms of numbers? ▪ At what point will we consider canceling the event? Do we have a cancellation policy in place? ▪ How will we advise potential guests of cancellation? 	
Resources	
Internal	External
Conference Registration: Division of Continuing Studies	

Section 8

Volunteers and Staffing

A great deal of your event's success will depend on the staff and volunteers who help make the day happen. They are responsible for ensuring the right things happen ... at the right place ... at the right time ... in the right fashion and, to your guests, they become the 'face of your event' and your front line contact. No matter how well planned or managed an event is, it is your volunteers' skills, abilities and personality that can make or break the day. You will want to make sure that staff and volunteers:

- are knowledgeable about the overall event;
- are trained in their specific area;
- know the appropriate resources or where to direct people for questions they cannot answer;
- have a strong customer service orientation;
- are able to work well under pressure (the nature of all events).

Planning and Recruitment

As previously mentioned, you will want to start your volunteer planning early in the process. By assessing your preliminary volunteer requirements, you will have a sense as to how complicated your recruitment might be and whether you need someone designated just to handle this area. Additionally, there may be budget issues relative to volunteer management such as special identity (i.e. clothing or customized name badges); food and beverage costs on event day; travel expenses (if applicable, in the case of a late hour event); and, volunteer recognition.

When planning your volunteer requirements, be sensitive to the scheduling of your event and the availability of volunteers. Your event scheduling will have a direct impact on how much time a volunteer is able to commit. For example, it would be more difficult to find volunteers for a Saturday evening event over the dinner hour than it would be to recruit someone to help during work hours for a work-related event.

Be realistic about the tasks that need to be performed and be sensitive to how tiring or stressful they may be. It is important your volunteers are energized and pleasant. You may find it more beneficial to schedule more volunteers for shorter periods in high traffic or high stress areas.

Before you start recruitment, make sure you properly identify your expectations are and what you will be offering volunteers. It is amazing the number of questions that will come forward once the recruitment begins. Things you may want to consider include:

- Will there be a training and/or orientation?
- Is special attire required?

- Will there be a spot for volunteers to have a break? Lock up valuables?
- Will there be food available?
- Are volunteers allowed to participate in event activities?
- Will volunteer activity be put on personnel records or will they receive a written letter of thanks?
- Is a criminal check required due to the nature of work being done?

Start your recruitment process as early as possible. You will need to have the appropriate time to properly develop the schedule and ensure your volunteers are comfortable in their roles.

Always ensure you have two to three volunteers as back up or as floaters. There will bound to be volunteers who will be sick or unable to be involved at the last minute.

Determine the specific skills that are required for each volunteer area and recruit accordingly. If there is a specific skill set required, you may have to source out specialized sources of volunteers (i.e. child care, technical equipment, etc.). Be prepared and allow the appropriate time for this to happen.

Volunteer Management

Effective volunteer management is often considered an art and acquired skill. Don't let that intimidate you. If you plan properly; communicate well; engage and excite your volunteers; apply common sense and common courtesy; and show your appreciation, you will be successful.

The following outlines some tips to help the process:

Pre Event

- Develop your volunteer schedule well in advance.
- Be sensitive to the demands of each volunteer position and schedule accordingly.
- Make sure you track complete contact information from volunteers as you recruit them so they can properly be thanked following the event.
- Communicate clearly the role and responsibilities of each volunteer position.
- Schedule a pre-event training and/or orientation (could be held on-site event day).
- Keep volunteers informed as to the status of the event – share the success and good news stories!

Event Day

- Ensure there is a special area for volunteers to take a break or store their personal belongings.
- Ensure each volunteer is introduced to his or her 'go to' person.
- Keep volunteers informed of any details that have changed regarding the event.
- If necessary, conduct a site tour so that volunteers are aware of what is happening and where.

Post Event

- Ensure you take the time to properly acknowledge and thank your volunteers. Determine the most appropriate way of doing this (i.e. letter, social gathering, etc.).
- Engage your volunteers in event feedback. They have been the front line people and are probably closer to what worked and didn't work than anybody else.
- Don't forget to ask if they would volunteer again. You never know when you may once again require volunteer services and having a pre-existing source of people you have already worked with can save a great deal of time in recruiting.
- Share the success of the event with your volunteers. They were part of it.

Section 8 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ How many volunteers will we need to effectively manage the event? ▪ Will they require special skills? ▪ Where will we recruit them? ▪ Is a criminal record check required due to the nature of the work? ▪ Will we require an orientation in advance of the event or can we handle training on-site event day? ▪ How will volunteers be identified from other event guests? Will we require special clothing or name badges? ▪ Do we have a rest space available for volunteers to have a break and leave personal belongings? ▪ Have we budgeted for all costs associated with volunteer recruitment and management? ▪ Have we planned how we will recognize and thank our volunteers for their efforts? 	
In the Tool Kit	
8.1 8.2	Sample Volunteer Schedule Sample Volunteer Position Description
Resources	
Internal	External
Sources for Volunteers: Student Alumni Association University of Victoria Retirees Association Athletic Teams	Saanich Police – Criminal Record Checks Volunteer Victoria

Section 9

Evaluation and Celebration

Although the event is over, the job is not yet finished. There is still work to be done from an administrative and appreciative perspective. While management of the event is always very tiring and draining on resources, it is critically important that the post- event duties not be overlooked. These include:

- ▶ Event Evaluation
- ▶ Recommendations
- ▶ Thank You's
- ▶ Sharing the Good News
- ▶ Celebrating Your Success

▶ Event Evaluation

As mentioned in Section 1, the appropriate evaluation process and tools should be developed as part of the planning process. This is particularly important if you plan on conducting the evaluation onsite while everyone is still gathered. While evaluations from guests and attendees are important, don't forget to get feedback from others involved in your activities including members of the planning committee, sponsors, volunteers and suppliers. They all had some role in the event and have diverse and valuable perspective in different areas. It is useful to already have a post-event meeting scheduled for your committee within a week or two of the event to capture ideas while they are still fresh in people's minds.

How you conduct your evaluation will vary between events. In some cases it is not appropriate to have written evaluations (i.e. Open House, Public Reception). In these cases, you can still gain valuable information by speaking to guests and attendees and getting their feedback verbally.

If you are using written evaluations they need to be short and concise. You want to very clear in terms of the purpose of your evaluation and what information is critical for assessment and future planning. The evaluation tool should be as user friendly as possible to encourage easy completion. Often evaluations designed with multiple-choice questions and only one or two open-ended questions get the best results. You may want to consider offering an incentive for people to complete the evaluation (i.e. draw or gift).

Typically as part of your evaluation process you want to gather information related to:

The Attendee	<ul style="list-style-type: none"> ▪ Who they are (i.e. student, Faculty, alumni) ▪ Reason for attending
Promotion	<ul style="list-style-type: none"> ▪ How did they hear about the event
Program	<ul style="list-style-type: none"> ▪ Length and timing of event ▪ Program elements ▪ Speakers and presenters (content and delivery)
Logistics	<ul style="list-style-type: none"> ▪ Appropriateness and comfort of venue ▪ Location and parking ▪ Pricing ▪ Food and beverage (if applicable)
General Comments	<ul style="list-style-type: none"> ▪ Benefit of event (value for dollar, if applicable) ▪ Recommendations for improvement ▪ Would they attend again

► Recommendations

As you moved through the planning and implementation process, there were no doubt areas you found could be improved. Upon completion of the event, it is important you review each project area (i.e. promotion, programming, site logistics etc.) and outline what worked well in that area as well as suggested areas for improvement. The feedback from your evaluations should also be included as part of this reporting process. From these assessments, it is important to move the collective evaluations forward into recommendations for future events. It is invaluable information the next time you need to organize a similar event – particularly if there are different people involved in the process.

► Thank You's

Thank you letters should be distributed to all parties involved with the event as soon as possible. Thank you letters are not always necessary for event attendees unless there was a fundraising component, however, you do want to ensure they are sent to all speakers, program participants, suppliers, staff and volunteers. It is valuable to have your letters signed by the chair of the planning committee or a senior representative of the University. You may also want to consider including a thank you on the University website.

Sponsor thank you's warrant special attention. Apart from a letter, it may include a special recognition gift as outlined in your sponsorship agreement. It is always valuable to meet with your major sponsors following the event to personally thank them and gather their input.

► Sharing the Good News

People involved with events always like to hear the 'good news stories'. This is particularly relevant if there were any type of fundraising activities. You may want to consider sending out a media release following the event outlining a brief overview of the day and specific

highlights. It is always nice to include an engaging picture with the media release. It increases your opportunity of getting coverage. Don't forget to spread the good news throughout the University community as well.

► **Celebrating Your Success**

And last but not least – don't forget to pat yourself on the back. It has taken a lot of work and hopefully it was worth the effort. You may want to think about a special way of celebrating the success with the Planning Committee for their collective hard work.

Section 9 - Tools & Resources

Audit Questions	
<ul style="list-style-type: none"> ▪ Have we identified all people who need to be thanked? ▪ Who will sign the thank you letters? ▪ Are there any specific requirements through our sponsorship agreements? ▪ How will we conduct our evaluation process? ▪ What information do we need/want to track through this process? ▪ Is our evaluation concise and user-friendly? ▪ Do we want to offer an incentive for people to complete the evaluation? ▪ Have we scheduled a wrap-up meeting for the planning committee? ▪ Have we received feedback from all project areas? ▪ Has the workplan been updated? ▪ Have we reconciled the budget? Are all invoices as per quotes? ▪ Have we outlined recommendations for future events? ▪ Do we want to send out a media release post-event? If so, do we have a picture to accompany it? 	
In the Tool Kit	
9.1	Sample Event Evaluation (Conference)

Toolkit Summary

Please refer to the University of Victoria
Event Toolkit for the following appendixes:

Section 1: Getting Started	1.1 TEMPLATE: Event Attendance Request Form
Section 2: Planning Your Event	2.1 SAMPLE: Event Workplans 2.1 (A) Workplan – Awards Event 2.1 (B) Workplan – Building Opening/Naming Checklist – Building Opening/Naming 2.1 (c) Workplan – Conference 2.2 SAMPLE: Event Budget 2.3 SAMPLE: Committee Organizational Chart
Section 3: Sponsorship	3.1 SAMPLE: Sponsorship Package
Section 4: Program Development	4.1 TEMPLATE: Speakers Agreement
Section 5: Marketing & Promotion	5.1 SAMPLE: Marketing Plan
Section 6 Site Logistics	6.1 TEMPLATE: Event Rollout 6.2 RESOURCE: Supplier Listing
Section 8 Volunteers	8.1 SAMPLE: Volunteer Schedule 8.2 SAMPLE: Volunteer Position Description
Section 9 Evaluation & Celebration	9.1 SAMPLE: Event Evaluation (Conference)

Event Audit Questions

<p>Section 1: Getting Started</p>	<ul style="list-style-type: none"> ▪ What is the vision and purpose of our event? ▪ Is an event the best way to achieve our objective? ▪ What will the event look like? ▪ Are there things we can do to make this event unique and different? ▪ When is the best time to hold this event? ▪ What else is scheduled at the University or in the community that will impact this scheduling? ▪ How many people do we want/need to attend? ▪ Is there an appropriate site available for our event? ▪ How much money will the event cost? ▪ What budget is available and where will it come from? ▪ Do we have the necessary resources (staff and volunteers) to successfully plan and manage the event?
<p>Section 2: Planning Your Event</p>	<ul style="list-style-type: none"> ▪ Will we require a Committee to help manage the event and if so, what skills do we need? ▪ How often will the Committee meet? Where? When? How? ▪ Where will we recruit Committee members? ▪ Do we have a clear outline of our expectations for Committee members? ▪ Have we established a communications system and decision making process for the Committee? ▪ Have we thought through each project area when developing our Event Workplan? ▪ Is our workplan realistic in terms of deliverables and due dates? ▪ Does our workplan contain milestone dates and contingency plans? ▪ Have we identified all project expenses? ▪ Does our budget include various revenue projections in terms of sponsorship and/or attendance? ▪ Do we require volunteers? How many? How/when will they be recruited?
<p>Section 3: Sponsorship</p>	<ul style="list-style-type: none"> ▪ Does this event require sponsorship? If so, have we identified the university's existing Strategic Alliances to avoid conflict? ▪ Have we cleared our sponsor prospects through the Development Officer? ▪ What are our needs in terms of sponsorship? ▪ How many levels of sponsorship will we have? ▪ What are we prepared to offer for each level and is there equity in how we have structured the benefits? ▪ Who would receive benefit by being affiliated with our event? ▪ How should we approach them (i.e. letter, phone call, personal visit)? ▪ Have we followed up in writing with our sponsors to confirm all agreed upon details? ▪ What systems do we have in place to keep our sponsors involved and informed?

Section 4: Program Development	<ul style="list-style-type: none"> ▪ Have we identified all the required elements of our program? ▪ Do we want to add any supplemental activities that enhance the overall event? ▪ Is our program interesting, engaging and informative? ▪ How much time do we need to factor in for guest/participant arrivals? ▪ Have we built in time for socializing and/or networking? ▪ Have we built in time for guests/participants to move between rooms or venues (if applicable)? ▪ For meals, have we discussed our event program and timeline checked with Food Services/the University Club? ▪ What is our budget for speakers? What are the most critical items that need to be covered within this budget? ▪ Who will be involved in the speaker selection process? Line removed ▪ Have we built time into the program for any sponsor remarks? ▪ Have we confirmed the availability of appropriate University executives to participate in the program as speakers or as Emcee? ▪ Have we confirmed all speakers in writing? ▪ Do we know the speakers AV requirements? Do we have a bio/picture? ▪ Have we designated someone to pick up our speaker(s) from the airport if they are arriving from out of town? ▪ Do we have a contingency plan for speakers who may have to cancel? ▪ Do we need to prepare speaking notes? Who needs to provide approval or sign off on these notes? ▪ Who will be responsible for greeting the speakers upon arrival at the event? Will the speakers need an event briefing on arrival? ▪ Are we presenting a speaker's gift as part of the event program?
Section 5: Marketing & Promotion	<ul style="list-style-type: none"> ▪ Have we forwarded event details to University Communications to determine their ability to support the event? ▪ Do we know who our target market is to attend the event? ▪ Do we know how to best reach them? ▪ Is an invitation list prepared with correct contact details? ▪ What is our advertising and promotion budget? ▪ Is our marketing plan diverse and wide-reaching? Have we explored all opportunities for promotion? ▪ Do we have a clear and realistic outline of deadlines for print materials and media? ▪ Have we profiled all sponsors appropriately in our marketing materials? Do we have their current logos? ▪ What is 'the story' for the media? ▪ Who will be responsible for media interviews?
Section 6 Site Logistics	<ul style="list-style-type: none"> ▪ Have we obtained quotes from event suppliers? Will an RFQ (S) be necessary if costs are over \$2,500 for off-campus suppliers? ▪ Have we left enough time to go through Purchasing's RFQ process? ▪ What will we do in the case of rain and an outdoor event? ▪ Have we thought through all areas of the event, identifying need for contingency plans? ▪ Where will guests park for the event? What special arrangements are necessary for VIP guests?

	<ul style="list-style-type: none"> ▪ What is our site capacity for guests/attendees? ▪ How will we handle room set up? Are the speakers comfortable with this set up? ▪ Will we have an opportunity to do an audio visual check with our speakers in advance of our program start? ▪ How will we handle any technical problems at the event? ▪ Do we have any special lighting or décor requirements? ▪ When do we have access to the venue for set up? Have we scheduled enough time for our suppliers? What can be done in advance? ▪ What type of signage is required? What can be created in-house and what needs to be professionally produced by Marketing? Have we allowed the appropriate time for this? ▪ Is our registration or guest arrival area large enough to avoid any bottlenecks? ▪ Have we designated someone to welcome people to the event and assist by answering questions or directing traffic? ▪ What are the numbers for food and beverage service? ▪ What process is in place for tracking any special dietary requests? ▪ Do we want UVic Photos Services to photograph the event? If so, do they need an advance photo list? What element of the event do we want to focus on? Have we considered an area for sponsor/speaker photographs? ▪ Have we reviewed any plans for videoing or webcasting the event with speakers? ▪ Have we made arrangements for any guests with special needs? ▪ Have we assigned an event manager? ▪ Has a rollout (see Toolkit appendix 6.1) been prepared and circulated to all suppliers and relevant participants? ▪ Do we have enough staff and/or volunteers to handle all site requirements? ▪ Have we identified potential problems and how we are going to handle them? ▪ What time does the venue need to be cleared by suppliers? Who will supervise the strike?
Section 7 Registration	<ul style="list-style-type: none"> ▪ What type of registration system do we require? What information needs to be tracked? ▪ Do we require guests to RSVP? If so, how will they respond? ▪ Will we require a formal confirmation system? ▪ Will we require name tags? Who will produce them? ▪ Are we properly staffed for registration? ▪ Have we set up a system for people to pay at the door? ▪ When do we need to confirm food and beverage numbers? ▪ What is our venue capacity in terms of numbers? ▪ At what point will we consider canceling the event? Do we have a cancellation policy in place? ▪ How will we advise potential guests of cancellation?
Section 8 Volunteers	<ul style="list-style-type: none"> ▪ How many volunteers will we need to effectively manage the event? ▪ Will they require special skills? ▪ Where will we recruit them? ▪ Is a criminal record check required due to the nature of the work? ▪ Will we require a volunteer orientation in advance of the event or can

	<p>we handle training on-site event day?</p> <ul style="list-style-type: none"> ▪ How will volunteers be identified from other event guests? Will we require special clothing or name badges? ▪ Do we have a rest space available for volunteers to have a break and a secure place to leave personal belongings? ▪ Have we budgeted for all costs associated with volunteer recruitment and management? ▪ Have we planned how we will recognize and thank our volunteers for their help?
<p>Section 9 Evaluation & Celebration</p>	<ul style="list-style-type: none"> ▪ Have we identified all people who need to be thanked? ▪ Who will sign the thank you letters? ▪ How will we conduct our evaluation process? What information do we want to track through this process? ▪ Is our evaluation concise and user-friendly? ▪ Do we want to offer an incentive for people to complete the evaluation? ▪ Have we scheduled a wrap-up meeting for the planning committee? ▪ Have we received feedback from all project areas? ▪ Has the workplan been updated? ▪ Have we reconciled the budget? Are all invoices as per quotes? ▪ Have we outlined recommendations for future events? ▪ Do we want to send out a media release post-event? If so, do we have a picture to accompany it?