

Event Planner Guide

Guidelines for Alberta Council Provincial Events

PROVINCIAL COMMITTEE: _____

PROVINCIAL ADVISER: _____

Telephone: _____ E-mail: _____

NAME OF EVENT: _____

DATE(S) OF EVENT: _____

FACILITY/LOCATION: _____

Contact: _____ Telephone _____

**EVENT CO-ORDINATOR: _____

Telephone _____ E-mail _____

PROVINCIAL OFFICE: 11055 – 107 Street NW, Edmonton, AB T5H 2Z6
Telephone: 780-424-5510 Fax: 780-426-1715

REGISTRATIONS AND FINANCIAL: E-mail: accounts@albertagirlguides.com

NAMETAGS/HANDOUTS E-mail: adminassist@albertagirlguides.com

** Event co-ordinator is defined as the person(s) responsible for planning and carrying out the event.

Note:

- included in this packet are forms for the provincial committee adviser and event co-ordinator
- for events sponsored by camping, an additional form may be required from the camping adviser

Event Planner

Thank you for taking on the challenge of co-ordinating an Alberta Council provincial guiding event.

The content of this document is to assist with the details and planning for an event. The document is divided into guidelines for the provincial committee adviser and the event co-ordinator.

The most important consideration is that the success of the event relies upon a team effort. You are encouraged to create a team to assist you with the planning / co-ordinating of the event. It's imperative the event co-ordinator and the provincial committee adviser have regular contact to ensure all facets of the event are considered.

If you find errors or omissions, or think of better methods or ideas, as you work through this document, please forward suggestions to the provincial committee adviser, requesting she share them with the appropriate standing committee adviser. These guidelines are to assist with the planning of events and, with your help, can be revised to ensure they are easy to use and appropriate for the events planned.

Once again, thank you for taking on this challenge.

Enjoy!

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Event Planner — Provincial committee adviser (or member of committee responsible for event):

Comply with current edition of *Safe Guide* standards (Appendix 2). Ensure Guiders who lead events are members and have a current PRC and Safe Guide training.

- _____ Arrange dates and type of event one year to eighteen months in advance.
- _____ Determine general goal / theme for the event.
- _____ If the event is to be held at Alberta Guide House; complete booking forms (available from provincial office).
- _____ Get cost estimates (site rental, accommodation, meals, equipment rental, etc.).
- _____ Visit potential sites if necessary and arrange for provincial office to book facility. Ensure the event is added to the Alberta Council interactive calendar on the website.
- _____ Accommodation may be handled in one of two ways:
 - make an all-inclusive booking: meals, sleeping, training rooms, etc.
 - book training facility and some meals. Accommodation and breakfast is arranged by participants. Provide suggestions for hotels in the area, including costs.
- _____ Arrange to have contract written up.
- _____ Have contract signed by provincial contract signer. Arrange to have the cheque for the deposit produced (use an e-cheque requisition).
- _____ Select an event co-ordinator, in consultation with your committee.
- _____ Invite the Provincial Commissioner (or PC Team) to the event as soon as the date is set. Typically, the provincial adviser sends the invitation; advise the event co-ordinator this has been done.
- _____ Provide provincial office, in writing, the event details: name and date of event, location, cost, deadline date, and name, address and telephone number(s) of the event co-ordinator and who is authorized to approve expenses.
- _____ Invite provincial advisers (camping, cookie, international, membership, program, public relations and training) to provide input / ideas and involvement of their committees and members.

- _____ Send the following forms to the event co-ordinator:
 - copy of the budget for the event
 - provincial newsletter deadlines
 - copy of notification to provincial office giving financial authority for the event
 - e-cheque requisition form
 - event financial report and worksheets
 - expense account forms (available from provincial office)
 - previous event evaluations, budgets, participant letters / information, program and reports including the final financial report

- _____ Act as liaison between all parties involved in the event. Review the guidelines in detail with the event co-ordinator to ensure they know what is expected.

- _____ Using the budget, and in conjunction with the event co-ordinator, set a registration fee for participants for the event, to cover accommodation, meals, photocopying, supplies, program or trainer expenses and, if necessary, facility rentals.

- _____ Determine if event qualifies for a government grant (Appendix 9) and determine who will complete the application process.

- _____ Keep in regular contact with event co-ordinator to monitor progress.

- _____ Send event information, schedules, programs and accommodation, etc. to the Provincial Commissioner (or PC Team) and other invited guests who the event co-ordinator has confirmed are attending.

- _____ Invitations for out-of-province participants must be submitted by March 15th of the year prior to the event and are sent by the Provincial Commissioner.

- _____ After the event, file a copy of the event financial report to the provincial office or the applicable provincial adviser.

Event Co-ordinator

You need a team!

Event co-ordinators are responsible for finding a team to handle the program / activities as well as the comforts of participants and trainers / presenters throughout the event. This team includes the trainers / presenters and those who provide support for the participants' needs (meals, accommodation, supplies, etc.). A central table should have a first aid kit available, emergency contacts, schedule, facility maps, registration forms (for the participants), and information about where to find what during the event. It is very useful to have an identifier for the event team members — colourful scarves, hats, vests, etc.

- _____ Choose your team members. Alberta trainers' interests and experience in modules and topics is available from the provincial trainer development adviser. This information is available to assist you with selecting a well-rounded team.
- _____ Submit event announcement / teaser ad to the *Blue-Print* editor and website (four to six months before event). Submissions must go through the provincial committee adviser.
- _____ The event co-ordinator is responsible for the finances although she may delegate the duties of record keeping.
- _____ In consultation with the provincial adviser, contact the facility as soon as possible for the number and type of break-out / meeting rooms required. Note: It is better, in most cases, to have one person deal with the facility. Harvard Park Business Centre requires a single contact (event co-ordinator). Ascertain if there is any extra charge for equipment, meeting rooms, microphone, etc.
- _____ The budget should include shared accommodation for all team members. A team member may choose to pay additional cost for a single room.
- _____ Review the budget to determine registration fee and / or costs required, in conjunction with committee adviser. Remember to include participants' accommodation, meals, session rooms, facility rentals, out trips, trainers / presenters and guest costs, etc. Set registration fee in consultation with provincial adviser.
- _____ Consider an early registration discount or reward. Set cancellation policy and travel parameters.

- _____ Write / send requests for donations for “goodie bags,” if appropriate. If the organizing team decides to solicit for donations, approval must come from the committee adviser for the letter used; be sure to follow-up to confirm donations.
- _____ Inform provincial adviser of suggestions for resource people / guests to be invited; forward invitation to people selected (keep finances in mind). If a gift or honorarium is to be given, ensure it will be forwarded promptly. Any fee is usually paid upon receipt of invoice. Honorariums are usually presented at the event.
- _____ Determine additional trainers / session presenters needed for specific session topics and invite them to train at the event.
- _____ Prepare the information sheet (Appendix 1) for the *Blue-Print* editor, ANY_GuideNews editor and webmaster. Submit to provincial committee adviser. Note: Ensure you meet deadline for newsletter issue that will be received at least one month prior to event deadline.
- _____ The provincial event registration form (AB.Council.07) available on the provincial website can be used or you may create your own.
- _____ Session choices are put on the website and sent to participants upon registration. Participants are asked to submit their choices to provincial office, where the iMIS meeting module is used to fill sessions.
- _____ Send event information, schedules, programs and accommodation, etc. to the provincial adviser who will forward to the Provincial Commissioner (or PC Team) and other invited guests. Ensure they are registered as participants.
- _____ If funds are needed to cover expenses, you can request an accountable advance from the provincial office by completing the e-cheque requisition or by e-mail to AccountClerk@albertagirlguides.com. Advance cheques will include a form showing breakdown of expenses. This form (with receipts) must be returned with the balance of the money or a request for additional funds. Include this information in the event financial report.
- _____ Check with your team to see which of the following are needed: equipment, supplies, room size, room set-up required, etc.
- _____ Create logo for event – provincial office may assist, with plenty of lead time. Be sure to share this responsibility with other event team members. Design must be approved by deputy provincial commissioner responsible for approval of crests and merchandise (form AB-PR.01).
- _____ Logo can be used to create a crest or merchandise for the event with the approval of the deputy provincial commissioner — the approval form must be submitted a minimum of two weeks prior to ordering (Appendix 8).
- _____ Prepare an evaluation form for the over-all event (to include evaluation of accommodation, training facility and catering, etc.)
- _____ Prepare session evaluation forms and ensure they are distributed to the trainers / presenters of individual sessions.

- _____ Advise provincial office regarding services and items they will be providing for the event (participant list, session choices, notepads, registration folders, buttons, name tags and holders) (Appendix 3).
- _____ Book provincial office equipment required by trainers / presenters (laptop, LCD projector, flip charts, etc.) well ahead of time. Finalize audio-visual contract with facility (if required).
- _____ Pay bills promptly and keep an accurate record of all financial transactions. Keep all receipts.
- _____ With your team, decide who is responsible for opening and closing ceremonies, reflections, Guides' Own, graces, crafts and introduction of team members.
- _____ Inform team members of accommodation and travel arrangements. Determine if the team will provide their own transportation or if alternative arrangements need to be arranged (i.e., transportation to and from bus depot or airport to the facility).
- _____ Registration forms and fees are to be forwarded directly to the provincial office for processing of payments. Receipts will be held for distribution at the event (in participant folders). The office will use iMIS meeting module to create a participant list, name tags, etc.
- _____ Finalize the transportation / accommodation for your team and guests.
- _____ Provide the provincial adviser (or her designate) with regular status reports during the planning stages of the event. Send copies of all correspondence to provincial adviser.
- _____ Send to the provincial adviser (or her designate)
 - copy of the final program
 - name of trainer / program deliverer and number registered for each session
 - session evaluations
- _____ Arrange for the printing of the final program by provincial office. Briefly and clearly describe the content of each session and, if possible, who is facilitating that session. Send copies to all members of the training team in advance. (Appendix 7)
- _____ Determine a deadline for trainers to submit print / photocopy requests to provincial office (should be one month — two weeks minimum prior to event). If material is being picked up, advise office when, who, etc. Send office a copy of the print request form (Appendix 7). Note: form is available electronically from the provincial adviser.
- _____ Send participant folder contents (Appendix 4) to provincial office for printing and assembling — the folders will be assembled by the office, but the contents must be determined by the team (Appendix 7).
- _____ Obtain a supply of Health Forms (H.2) from provincial office to have at registration desk for participants who did not bring one with them.
- _____ Obtain a supply of expense forms from provincial office and distribute to team members for mileage and session expenses.

- _____ Prepare an information package for participants; send via e-mail, if possible. The letter should include: time event begins and ends, kit list, session topics and outline, map to facility and accommodation, emergency telephone number and uniform requirements. Information regarding music books, tape recorders, publications, etc. to be used would be helpful. Include a telephone number participants can call if they are going to be late or are unable to attend at last minute. The information should request a Health Form H.2 be completed and brought to training (participants should keep the Health Form on their person). Include program session choices, if possible.
- _____ Send out acknowledgement of registration form / fee with information package — e-mail if possible.
- _____ Request provincial office to send registration forms to you on a weekly basis and more often after the deadline.
- _____ Adhere to deadline set. Deadline dates are firm as per provincial policy.
- _____ Request a participant list after the deadline.
- _____ Assign training rooms to trainers / topics based on session registration.
- _____ Make directional and / or room identification signs. You may also wish to make a large wall copy of the program.
- _____ Provide a suitable first aid kit to be kept at the registration desk.
- _____ Set menu with caterer for food and beverages (consider allergies and dietary requirements of participants). For facilities that set their own menu, ensure you send the allergy / dietary requirements as soon as possible after the deadline.
- _____ Ensure a cloakroom or coat rack is made available, if possible.
- _____ Confirm transportation schedules: airlines, buses, cars.
- _____ Confirm facility accommodations.
- _____ Prepare transportation and accommodation schedules (include arrival time, flight number, airline, person assigned to meet flight).
- _____ Organize staffing of the registration desks to avoid line-ups. Registration desk personnel should be on duty at least one hour prior to event starting time.
- _____ Final walk-through with team (if possible).
- _____ Have helpers on duty at the training to: assist trainers / program deliverers with luggage, supplies, etc., move chairs and tables, set-up equipment, operate lost and found, clear up after training.
- _____ During the event be aware of the program deliverers' / trainers' personal needs (if time is short, make sure refreshments are taken to their training rooms).

- _____ After the event — send the iMIS generated participant list to provincial office for activities / trainings (TEAM modules) attended as this is entered into iMIS records.
- _____ Send reminder e-mails to the program delivers / trainers about submitting their expenses — aim to have all expense requests in by the end of the event.
- _____ Submit all expense accounts to the provincial office within four weeks of the event. All such submissions must have a verifying signature on them; the provincial adviser should sign the expense form for the event co-ordinator.
- _____ Complete the event financial report (Appendix 6) within six weeks of the event and forward a copy to the provincial adviser and deputy provincial commissioner. Retain one copy for yourself as follow-up.
- _____ Send an event evaluation and report (Appendix 5) to the provincial adviser (or her designate) within six weeks of the event. This report should include the following information from the over-all evaluations: general atmosphere of training, suitability of facilities, any problems encountered by the team, suggestions for future events / trainings, anything else you consider important.

Appendix 1

Information Sheet for *Blue-Print* to Include:

- Event Information
 - name of event
 - date, place and time event begins and ends
 - address and telephone number of both event facility and accommodation
- Program information
 - who the event / training is for (Ranger Guider, commissioner, etc.)
 - general program outline or session descriptions (including additional costs for particular sessions, i.e. \$10 for booklet, etc.)
 - any prerequisites
- Financial Arrangements
 - full cost and what it covers (note: GST is not charged on adult events)
 - refund policy (is fee non-refundable or transferable after a certain date?)
Note: any participant who assumes the transferred registration of another participant will also assume the program and room assignments and their name will not appear on the participant list.
 - cancellation information
 - registration fee must accompany application or credit card number, expiry date and signature
 - include this statement *“it is the participant’s responsibility to ensure that application forms and fees arrive before the deadline. The participant will not be processed or registered until both the registration form and the payment have been received.”*
- Advise if there is a limited number of registrations accepted (if there is a limit); registrations received after the limit will be notified the event is full.
- Deadline for registration to be received by provincial office — emphasize the date.
- Where to send form and fee, advise a receipt will be sent or available upon registration at event. **Note: Cheques are payable to Girl Guides of Canada-Alberta Council**
- Accommodation and meals (be very clear about hotel reservations, and where to send money, etc.).

Use ANY_GuideNews to put a “teaser” that links or directs Guiders to the Alberta website for more detailed information.

Appendix 2

Safe Guide

Safe Guide 2008 is available at www.girlguides.ca in the Member Zone under Guider Resources. More information can be obtained by contacting safeguide@girlguides.ca.

Guiders are expected to apply the same principles of thorough forethought and safe planning in all Guiding-related activities, whether girl or adult activities.

Adult only activities, except for meetings and conferences, must comply with points listed on page 122 of *Safe Guide 2008* (Appendix A).

All Yellow and Red level, water activities and international travel activities must be assessed by Safe Guide Assessors before they can proceed. Ensure you allow an appropriate amount of time for the assessment of the activities.

Contact your activity assessor for assistance when planning an activity using a third party provider.

Staffing your event:

- The Responsible Guider, Member volunteers and non-member volunteers who volunteer at camps or camp-like settings such as sleepovers must have a current / valid Police Record Check. Non-member volunteers must not be left alone one-on-one with a child who is not their own.
- The Responsible Guider must have completed the Safe Guide training module.

Program choices and Safe Guide:

- Events that include water activities must be authorized by the water activities assessor.
- Anyone (girl and adult) who wants to swim without a personal floatation device (PFD) must take a swim test. This includes non-members. Swim tests are valid for five years from the date of testing.
- Adventure activities require a Release of Liability, Waiver of Claims, Assumption of Risk and Indemnity Agreement (SG.5) form to be completed prior to participation.

Appendix 3

Services Provided through the Provincial Office:

Applications and cheques for events received in provincial office:

- receipts issued for cheques
- listing of participants available whenever needed
- listing of other information as needed — dietary, allergies, travel, accommodations, sessions

iMIS Meeting Management Module

- Attendance and activities are added to participant's iMIS record after the event. This is entered from the sign-in sheets provided by the office, which **must** be returned for entry. Hand-made sign-in sheets will not be accepted.

Equipment available through the office:

- flip charts (5), TV/VCR, overhead projector, portable display boards (2), camcorder, camera, portable screen, slide projector, laptops (2), LCD projectors (2).

See Appendix 7 for:

- printing of all handouts
- nametags holders (with or without names) for participants
- notepads (design should be ready for printing)
- labels with participants' names (for folders)
- labels with participants' names and addresses for mail outs (if not done out of provincial office)
- folders

Office staff do have a list of caterers but do not book the caterers (must be done by event co-ordinator).

Appendix 4

Participant folder suggestions: (Sticker with the logo and participant name label on front of the folder)

- welcome note to participants including housekeeping information — who to look to for help, where to find whatever they are looking for
- schedule / program
- orientation to site / location information (map of facility)
- participant list
- session evaluations (one per session)
- evaluation for the weekend
- notepad (special logo) or blank paper
- game / activity — crossword puzzle, word finds, brain teasers, scavenger hunt details

General:

- leave yourself enough time to plan well — effectively, efficiently and thoroughly
- decorations re theme — walls, tables, doors, hallways, entrances, foyers, session rooms, participant rooms, meeting rooms, dining rooms, washrooms
- flowers, posters, balloons, streamers, etc.
- table favours
- give-aways and take-aways — gifts, promotional items, crests, bookmarks, magnets (with logo), pins (only one item and one crest per event is permitted and permission must be obtained from the deputy provincial commissioner)
- door prizes
- Canadian World Friendship fund activity — door prizes (sell tickets), raffle, auctions
- activities for times between sessions or during free time
- at the event
 - introduce members of Alberta Council, provincial advisers and members of her committee, area commissioners, guests and team members
 - thank your volunteers (appreciation to team members and others) tangible (card, crest), celebration dinner?
- Thank special guest

Appendix 5

After the Event — Guidelines for Event Report

The feedback you receive and what you experienced during your planning sessions is valuable information. Please ensure you can provide as much detail as possible in the report to assist with future planning. Collation of the evaluation would be particularly helpful to the adviser.

Opening Section:

1. Goals for the event (personal, area, other, etc.).
2. Overall impressions at beginning of the event.

Training Section:

1. Overview of what was offered (include timeframes, breaks between, different streams covered, enrichment sessions, other sessions, etc.).
2. Feedback of selections, topics, etc., as well as number of participants in sessions and of trainers involved.
3. What worked, what didn't work?
4. Things that should have happened, but didn't (for whatever reason).
5. Suggestions for next year.

Overall Event/Facility Section:

1. Advertising and pre-event items (team organizing, planning, etc.) — was there enough, donations received, community support, etc.
2. Review of facility.
3. Feedback about facility, food, accommodations, etc. including value received, problems, etc.
4. Items included in the participant / trainer folders.
5. General overview of agenda/program.
6. What was done for theme, how theme was carried through.
7. What worked, what didn't?
8. Things that should have happened, but didn't (for whatever reason).
9. Suggestions for next event.

Closing Section:

1. Were the goals met?
2. Overall impressions and feelings about the event.

Appendix 6

GIRL GUIDES OF CANADA-ALBERTA COUNCIL FINANCIAL STATEMENT

For Provincially Approved / Sponsored Events

- attach to the report submitted to the sponsoring committee
- attach the SG.3 form (if girls were present at the event)
- submit this form within six weeks after the event

Event: _____ Event Dates: _____

Location: _____

Name: _____

Person filling out the Financial Statement

Income

Event/Camp Fees: (Fee \$ _____ x _____ # of participants)	\$ _____
Donations	\$ _____
Other (specify)	_____
_____	\$ _____
_____	\$ _____

Total Income \$ _____

Expenses

Site rental fee	\$ _____
Food	\$ _____
Transportation	\$ _____
Program: (crafts, special activities etc.)	\$ _____
Crests	\$ _____
Equipment and supplies	\$ _____
Administration: (telephone, photocopies etc.)	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Total Expenses \$ _____

Balance \$ _____

If income and expenses are not equal, please indicate how the shortage will be covered. If the surplus is more than \$10 per paid participant please indicate the amount of refund. **Executive motion E96.19f** – That any surplus exceeding \$10 per person from an event will be refunded to the individual. Any money less than this amount will be credited to the particular committee's income for the year.

Signature of Responsible Guider: _____

iMIS #: _____ Date: _____

Appendix 7

PRINTING REQUEST FORM

Date requested: _____ Final date required: _____
Charge to: _____ Requested by: _____
Approved by: _____

Required by: _____ Event: _____

Item _____

Quantity: _____

Main paper colour: _____

c requires a different coloured front cover - _____

c requires a coloured back cover - _____

c single sided c double sided c three hole punched c stapled

c Other special instructions: _____

Specialty Items

c Labels c Name Tag Holders c Folders c Other _____

Notepads

c Full Page c ½ Page c ¼ Page

Envelopes:

c #10 Standard c 5 ½ X 8 c 9 X 12 c 10 x 13 c window c other

Postage or Shipping:

c For pick up by: _____

c Mail to: _____

c Ship by courier to: _____

Courier Acct # _____

For Office Use Only

Date completed: _____

Date mailed or picked up: _____

Signature of person authorized to pick up _____

Order # _____ Invoice # _____

Appendix 8

Event Merchandise

One item per event may be produced. Event merchandise may be developed by event organizers and may be clothing: t-shirt, sweater, hat; or other product: binder, bag, or pen. This does not include variations of that item (e.g. t-shirt with long sleeves or t-shirt with short sleeves, not both). The merchandise must include the **name and date** of the event and may include the **event's theme / logo** or other information. Event merchandise **must include** the GGC logo as specified in the *Graphic Standards Manual* in Member Zone – Policies and Procedures – Graphic Standards.

Crests

You may produce one event crest in addition to the one item of merchandise per event.

The information regarding a crest is to be submitted to the provincial deputy commissioner using form AB-PR.01–Crest / Logo Use Approval (found on our website under public relations at www.albertagirlguides.ca/forms). Please note the form must be submitted a minimum of two weeks before ordering the crest.

Appendix 9

Government Grants

All grant applications for **provincially sponsored / approved events** must be approved by the Alberta Council Executive Committee prior to forwarding applications to the appropriate government body. (March 2011)

In addition:

All applications for government grants above the municipal level must be submitted through the provincial fund development co-ordinator.

The following must be included:

- FR. 1
- grant application fully completed with original signatures
- all necessary attachments as required
- grant summary sheet (AB.04) with area commissioner's signature
- copy of the minutes from area council approving application

If applying for a travel grant under the Community Investment Program (CIP) grant, the current maximum request allowed is \$10,000 or \$1,000 per GGC member traveling up to \$10,000, whichever is less.

All government grant applications should be delivered to the provincial office at least two weeks prior to the grant application deadline to allow processing time.

The provincial fund development co-ordinator is available to assist with grant applications and should be contacted early in the process as some projects/grants may require additional time for approvals.

Retroactive grant applications for monies already spent are not usually accepted by government, so plan and apply early.