



Healesville Community Renewable Energy Inc

Event01 - Event Planning Checklist

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1 Introduction

This document was prepared by the Healesville CoRE Community Engagement Manager in 2018 and revised in 2024 by the Governance Officer and President. The document has been adopted as reference material for the Event Design and Implementation Policy (Event01).

It is developed as a guide to assist the smooth running of Healesville CoRE events.

The following pages include useful information, tips, checklists and templates that were put together by the Community Engagement (CE) subgroup, based on the experience of organising and running the first event.

2 Event Planning Checklist

Event Name:

Date:

Time:

2.1 PRE-EVENT

| Task | Assigned To | Comments | Completed (Tick) |
|---|--------------------|-----------------|--------------------------|
| Put together an organising committee | | | <input type="checkbox"/> |
| Define the purpose and aim of your event | | | <input type="checkbox"/> |
| Identify the target audience/s | | | <input type="checkbox"/> |
| Prepare a budget and monitor spending | | | <input type="checkbox"/> |
| Develop an event planning timeline | | | <input type="checkbox"/> |
| Recruit volunteers | | | <input type="checkbox"/> |
| Book venue and pay deposit if required | | | <input type="checkbox"/> |
| Arrange insurance if required | | | <input type="checkbox"/> |
| Apply for any licences/permits if required (food, noise, signage, etc.) | | | <input type="checkbox"/> |
| Contact/confirm MC if needed | | | <input type="checkbox"/> |
| Contact/confirm speaker/s if needed | | | <input type="checkbox"/> |
| Contact/confirm sponsor/s if needed | | | <input type="checkbox"/> |
| Arrange catering and pay deposit if required | | | <input type="checkbox"/> |

| | | | |
|---|--|--|--------------------------|
| Develop a marketing plan | | | <input type="checkbox"/> |
| Design poster (image and text) | | | <input type="checkbox"/> |
| Organise ticketing/event registration | | | <input type="checkbox"/> |
| Print and distribute posters | | | <input type="checkbox"/> |
| Draft room layout | | | <input type="checkbox"/> |
| Identify technical needs (microphone, projector, laptop, etc.) | | | <input type="checkbox"/> |
| Contact/confirm videographer and/or photographer | | | <input type="checkbox"/> |
| Hire equipment if needed (lectern, chairs, tables, sandwich boards, etc.) | | | <input type="checkbox"/> |
| Conduct a risk assessment | | | <input type="checkbox"/> |
| Create a risk management plan | | | <input type="checkbox"/> |
| Contact/confirm First Aid officer | | | <input type="checkbox"/> |
| Draft event program | | | <input type="checkbox"/> |
| Draft feedback/evaluation forms | | | <input type="checkbox"/> |
| Draft running sheet of tasks on the day | | | <input type="checkbox"/> |

2.2 WEEK PRIOR

| Task | Assigned To | Comments | Completed (Tick) |
|---|--------------------|-----------------|--------------------------|
| Confirm venue booking | | | <input type="checkbox"/> |
| Finalise/confirm catering | | | <input type="checkbox"/> |
| Finalise and print event program | | | <input type="checkbox"/> |
| Finalise and print feedback/evaluation forms | | | <input type="checkbox"/> |
| Print any other handouts (membership forms, promotion material, etc.) | | | <input type="checkbox"/> |
| Make signs to direct attendees; locate and access pull up banners & posters for venue display | | | <input type="checkbox"/> |
| Finalise running sheet and provide copy to all volunteers | | | <input type="checkbox"/> |
| Hold a meeting of volunteers for final review of running sheet | | | <input type="checkbox"/> |

2.3 ON THE DAY

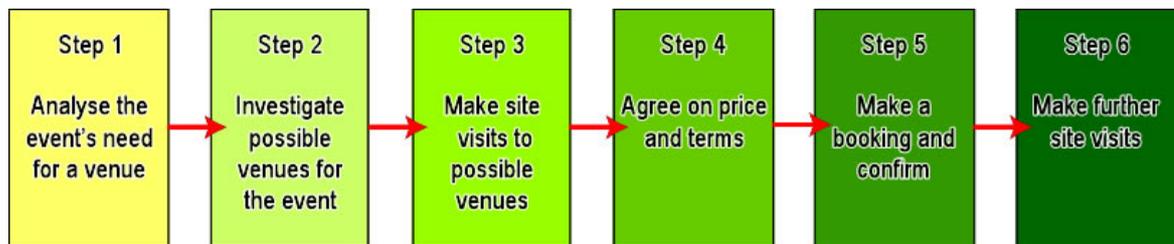
| Task | Assigned To | Comments | Completed (Tick) |
|--|--------------------|-----------------|--------------------------|
| Complete event set up (chairs, equipment, front of house, signage, etc.) | | | <input type="checkbox"/> |
| Collect membership payments and donations | | | <input type="checkbox"/> |
| Collect feedback/evaluations forms | | | <input type="checkbox"/> |
| Pack up all equipment | | | <input type="checkbox"/> |

| | | | |
|-------------------------------|--|--|--------------------------|
| Clean up if venue requires it | | | <input type="checkbox"/> |
|-------------------------------|--|--|--------------------------|

2.4 POST EVENT

| Task | Assigned To | Comments | Completed (Tick) |
|---|-------------|----------|--------------------------|
| Collect volunteer reimbursement requests for out-of-pocket expenses | | | <input type="checkbox"/> |
| Arrange payment of any outstanding bills and volunteer reimbursements | | | <input type="checkbox"/> |
| Ensure membership payments and donations are banked | | | <input type="checkbox"/> |
| Finalise budget | | | <input type="checkbox"/> |
| Analyse feedback/evaluations forms & produce written statistical analysis for President | | | <input type="checkbox"/> |
| Hold a de-brief meeting to review the event and celebrate your hard work! | | | <input type="checkbox"/> |

3 Selecting the Venue



3.1 Step 1: Analyze the event's need for a venue

It is necessary to ask many questions about what sort of venue is needed. Here are just a few of the questions that should be considered.

- Do we need an indoor or outdoor venue?
- What audience capacity does the event require?
- How long do we need the venue for, including setup and takedown?
- Is there access for wheel chairs?
- What about safety for the public? In events of emergency?
- Sanitary

3.2 Step 1 A: Preparations

Budget, estimated event size, and space requirements, Location, Insurance, Accessibility, Safety, Parking, Services and Amenities. Discuss budget with Treasurer & keep Treasurer informed of all costs e.g. hall hire, catering etc.,

3.3 Step 2: Make a site visit

If possible, a site visit should be arranged, especially if this site has not been used before.

3.4 Site Booking Checklist:

- Facilities booked
- Dates and times booked
- Payments required e.g. deposit and final payments
- Other contractual obligations e.g. insurance payment, cleaning arrangements etc.
- Leave Your contact details
- Ensure all agreements re costs are in writing and given to Treasurer before event

There are a lot of questions that one should ask the venue, here is a selection of important ones:

1. Is the venue available on the date you require?
2. Can the venue offer any discounts (especially during their off-season)?
3. What is the cancellation policy?
4. How much is the deposit?
5. Does the venue cover public liability insurance? How much and details?
6. Do we have to use the venue's suppliers?
7. Has the venue ever had an event like yours before?
8. Does the venue have on site catering? If so, what are the costs? Is there a professional kitchen?
9. Are there minimum food and drink numbers?
10. Can we sample the menu prior to the event?

11. What AV does the venue have? Is there equipment for speaker / music / microphone / AV equipment?
12. Access for people with a disability?
13. Are there parking facilities? Does this come with an additional cost?
14. Does the venue have complimentary WiFi and what are the capabilities?
15. Does the venue include furniture in the room hire?
16. What else is included in the room hire?
17. Is there space for all our activities – i.e. team building games?
18. Who will be the main point of contact on the day of our event?
19. How flexible is the room set up? Can our delegates easily move seats and chairs around if they need to?
20. What access do we have to the venue prior to the event? If we have a big set-up can we get in the night before?
21. Do we have to share the venue with anyone else? If so, how will the venue manage these different groups?

4 Liaison with speakers

Clarify what you want your speakers to talk about.

Approach speaker/s. You might like to provide them with a summary of information about:

- your objectives for the event
- who the anticipated audience is, including size
- options for timing of the event
- the expected venue

Confirm who your speakers are.

Confirm with your speaker:

- how long they have to speak
- what they will be speaking about
- who else will be speaking and what they will be speaking about
- they may have a previous presentation that is similar that they can send to you. If so you could comment to them on the content i.e. more of some topic, less of another, more graphics, simplify the graphics etc

Staying in contact with the speaker

- Along the way you will need to confirm with the speaker the final details of the event, the timing of the event, the program – when they will speak and for how long.
- Also check what the IT and other equipment requirements of your speaker are: lapel microphone, handheld, laptop, lectern etc
- Make sure to re-confirm some time (a few weeks/month) in advance of the event.
- Check if they are happy to provide their presentation in PDF format to attendees.
- After the event thank the presenter, you may have some good feedback to share with them about their impact.

If you have a draft presentation or detailed outline from the presenter, this can be very useful when it comes to promoting the event.

Remember to consider how to thank the presenter on the night... wine, local food, other gift, take them out for a meal? (If the speaker is receiving a fee for service a gift is usually not required).

5 Promotions

There are a range of free options to promote HCoRE events to the community.

Following is an example promotion plan from an event we ran with Alan Pears , which outlines the major ways of getting information out to the community. The following is not an exhaustive list, you are likely to have other ideas and connections you can use. Feel free to share new ideas.

The Community Engagement Group will help you with your promotions in the following ways:

- upload information to the Facebook page for you (or contact Facebook Manager)

- create and manage Facebook 'events' listings (or contact Facebook Manager)
- upload information for you to the HCoRE website (or contact Media Manager)
- until HCoRE has someone responsible for media we may also be able to help you arrange radio and news media

Acknowledging financial support

Always to remember to acknowledge any support, financial or otherwise, in promotions for events.

Organisations may have specific requirements regarding acknowledgement. Event co-ordinators are responsible for ensuring these requirements are fulfilled.

In the case of Yarra Ranges Council, instructions for acknowledgement are provided in writing to the Grants Coordinator and usually the President.

5.1 Advertising – media, schools

Radio and news media should be arranged if practical.

School contact (if appropriate) can be effective. This can include an email to the school, with a JPEG version of the advertisement attached. The school will include the ad if they have available space.

Schools that can be considered in our catchment area include:

- Badger Creek Primary School
- Healesville Primary School
- Healesville High School
- St Brigid's Primary School
- Chum Creek Primary School
- Gruyere Primary School
- Yarra Junction Primary & Secondary School
- Don Valley Primary School

6 Ticketing

Ticketing for public events can be done through CiviCRM. This includes webforms linked to the CiviCRM database.

7 Posters

It is helpful to have a list of the different businesses/locations that posters are accepted, and to keep track of where posters have been put up so that volunteers don't waste time going to places someone else has already been.

When getting posters printed for distribution consider how many you need, what size, and if any would best be laminated so they are protected from exposure (e.g., if displaying on the front of the Bendigo Bank building, or on a sandwich board at the community market, etc).

Venues that have been used in our catchment area include:

- Badger Creek Primary School
- Baker's Delight
- Bargain Store (near Coles)
- Barrique
- Barry Plant
- Beechworth Bakery
- Bendigo Bank
- Butcher (next to Toscano's)
- Candle Gift Shop
- Coles Community Notice Board
- Community Link (Council/Library)

- East End Op Shop
- Florist
- Gift Ware & Accessories
- Healesville Gym
- Healesville High School
- Healesville Hospital (staff areas)
- Healesville Sanctuary (staff room)
- ICCI
- IGA
- Laundrette
- Lions Op Shop
- Living & Learning Centre (kitchen area at 1 Badger Creek Rd and also in Admin)
- The Memo
- Miss Spelt's Organics
- Moora Moora
- Mugshot Hair Dressers
- Public Toilets (main street)
- Reece
- Robyn Jane Children's Centre
- RSL
- Senior Citizens
- The Grand Hotel
- Healesville Hotel
- Uniting Church Darron Honey Centre
- U3A
- Wild Grains Bakehouse
- Yarra Valley Quality Meats

8 Technical Planning

Technical planning for HCoRE events should include planning consideration and management of:

1. Sound – music, microphones, P.A systems etc
2. Lighting – house and stage lighting, windows and blinds and changes of these during the event
3. Visual – Projectors, cameras, filming equipment
4. Stage – mics and stands, lecterns, schedules and transitions between presenters
5. Audience – seating arrangements, traffic flows, emergency procedures, hazard management
6. Presenter/Facilitator – liaising to ensure their needs and requirements are obtained

| Checked (Tick) | Event Item | Who is responsible? Other Comments.... |
|--------------------------|---|---|
| Sound | | |
| <input type="checkbox"/> | PA System <ul style="list-style-type: none"> • Set up and test PA system prior to event to ensure music and microphones work and correct cabling is safely in place | |
| <input type="checkbox"/> | Microphones/Cables <ul style="list-style-type: none"> • Check mic's, set up stands • Ensure cables are neat and taped down to avoid trip hazards | |
| <input type="checkbox"/> | Music <ul style="list-style-type: none"> • Make a playlist of appropriate songs; consider length of time music is needed, who will operate music during event | |

| | | |
|--------------------------|--|--|
| <input type="checkbox"/> | | |
| Lighting | | |
| <input type="checkbox"/> | <p>House Lighting (audience and stage area)</p> <ul style="list-style-type: none"> • Check the lighting for the event is adequate, consider if more lighting is needed for audience safety, exits and entry's, outside • Decide on what lighting is needed for when people are entering and exiting, and for during event phases – check suitability prior to event making sure it is not too light for projector to be visible or too dark for audience to move around the space safely. Check window blinds work. | |
| <input type="checkbox"/> | | |
| Visual | | |
| <input type="checkbox"/> | <p>Projector</p> <ul style="list-style-type: none"> • Check equipment works and setup prior to event to ensure adequate throw distance between screen and projector • Connect projector to a laptop or device with the right connector – you can use a phone with the right adaptor which is handy • Gain a copy of the presentation, if one is being used, prior to the event • If you use a screen, elevate the screen by placing the screen on a sturdy table, cover the table with some black fabric for a clean look. | |
| <input type="checkbox"/> | <p>Camera/filming</p> <ul style="list-style-type: none"> • Liaise with any designated people filming or taking stills, and ensure they are set up and have everything they need prior to audience arriving. • Check hazards are managed such as cables and tripod legs to avoid trips • Set up projector and camera person in a central aisle | |
| <input type="checkbox"/> | | |
| Stage | | |
| <input type="checkbox"/> | <p>Setup</p> <ul style="list-style-type: none"> • Liaise with presenters/performers and check what technical things they need, and what setup they prefer. • Have a lectern available if necessary • Set up microphone for presenter, and have spare microphone for questions from audience members if volume might be an issue • Check events schedule and make sure what you will need is available on the stage • Think about how transitions between speakers/presenters will run – liaise with MC and ensure run-sheet is created | |

| | | |
|--------------------------|--|--|
| | <ul style="list-style-type: none"> • Consider number of volunteers needed and skills required | |
| <input type="checkbox"/> | | |
| | Audience | |
| <input type="checkbox"/> | <p>Seating</p> <ul style="list-style-type: none"> • Consider number of seats needed and set up accordingly • Set up audience seating with adequate access – 2 banks of seating with central access way is recommended – projector and camera can be set up in central access way | |
| <input type="checkbox"/> | <p>Traffic flow / Emergencies / Hazards</p> <ul style="list-style-type: none"> • Consider movement of people around area and make sure tables and chairs do not impede people moving around the space • Ensure access ways are free of hazards, objects and clutter • Observe emergency procedures (laminated placard near entrance usually) • First aid people must be designated, consider delegating tasks and roles to other volunteers or HCoRE reps. • Utilise the Risk Management Template to manage any identified hazards | |
| | Presenters / Facilitators | |
| <input type="checkbox"/> | <p>Presenters / Facilitators</p> <ul style="list-style-type: none"> • Liaise with them to get technical requirements they need for setup prior to event • Gain a copy of the presentation prior to assist in preparation | |

9 Feedback & Evaluation

Event Feedback is good. Asking the right questions is important and the questions to ask will depend on the event being run. For HCoRE funding and grant applications, it is important to get feedback on how important people find our organisation and events we run – so inclusion of a question like number 6 in the example below is important.

Some other question examples you could include:

- Was the event better, worse, or about what you expected?
- How would you rate the organization of the event?
- How comfortable did you feel asking questions at the event?
- How skilled in the subject was the presenter?
- On a scale of 1-10, how prepared were the presenters?
- Overall, how satisfied were you with the event?
- Would you recommend this event to other people? If yes, why? If not, why not?
- How was the food quality? Enough choice?
- Did you encounter any problems?
- How did you find the venue?
- If you were running the event, what would you have done differently?

Below is an example Feedback Sheet & Questionnaire from a Healesville CoRE Event.

Healesville CoRE Feedback Sheet & Questionnaire

Healesville CoRE would like to hear any feedback you have from tonight's event.

Your input in completing this short survey is very much appreciated. Your information is confidential. We will not disclose this information to any other person, organisation or business.

1. I found the event informative and useful.
(Circle one number where 1 is a low score & 5 is a high score)

1 2 3 4 5

2. What did you find the most useful about tonight's event?

.....
.....

Was there anything you did not find useful?

.....
.....

3. After this meeting, I feel motivated to make changes in my home to increase my energy efficiency. (Circle one number where 1 means not motivated, and 5 means highly motivated)

1 2 3 4 5

DONATIONS: We need your financial support. Ongoing administration costs mean we cannot function without community support. You can support us with your donation. For our bank details go to our website www.healesvillecore.org.au OR deposit some CASH tonight in our DONATION BUCKET!

QUESTIONS or COMMENTS: If you have a comment or any other feedback, please leave it here. If you have a question or two write them down & we will answer them on our website.

.....
.....

THANK YOU FOR YOUR ONGOING INTEREST AND SUPPORT

10 Run Sheet

To ensure an event runs smoothly it is important, well before the event, that all the different tasks and roles are itemised, and that enough volunteers are available and well prepared.

A Run Sheet should be developed, and a copy provided to all volunteers a week prior to the event, with a final run through on the day.

Below is an example Run Sheet from a Healesville CoRE event.

Run Sheet

Roles & Tasks for volunteers – names need to be included to this list to communicate who is responsible.

Prior to Event – 5.50pm for 7.00pm event start

- **Person A, Person B, Person C, Kitchen Person:**
 - ✓ Set up food display tables as required.
 - ✓ Set up urn and tea and coffee etc
 - ✓ Cut fruit and arrange on platters
 - ✓ Merrie making scones – assistance to be provided where necessary
- **Person A, Person B**
 - ✓ Chairs setup in 2 banks with aisle in middle where camera station and projector can be setup
 - ✓ Info table set up near entrance for display of feedback forms, handouts on CoRE info, events and projects info, and summary of info covered by Alan.
 - ✓ Donation Bucket x 2
 - ✓ Hanging of A2 posters
 - ✓ Roving assistants to help people locate toilets and keep food displays kept neat and clean.
 - ✓ Music
- **Technical Person**
 - ✓ Lighting to be set for event
 - ✓ Sound – House Music Play list
 - ✓ Microphone set up and test
 - ✓ Lectern
 - ✓ Table for computer & power cord and projector
 - ✓ Assistance for camera person
 - ✓ Extension cord for camera set up and gaffed to floor

During event including supper at close

- **Kitchen Person**
 - ✓ Ensure food area is monitored and kept clean.
- **Person A**
 - ✓ Info stand to be maintained
- **Technical Person**
 - ✓ Support for Alan, and photographer to be nearby

After event

- **Person A, Person B, Person C, Kitchen Person**
 - ✓ Pack up and clean up all dishes, utensils
 - ✓ Pack up food tables
- **Person A, Person B**
 - ✓ Pack up seating
 - ✓ CoRE volunteers with torches to assist with lighting path down to street if needed
 - ✓ Bucket for donations to be held near door for people leaving
 - ✓ Collect feedback forms
 - ✓ Collection of A2 posters
- **Technical Person**
 - Pack up projector, cables and laptops
 - Remove extension cord and tape

11 Event Program

Having another document that clearly outlines the timing of the actual event is also important. Below is an example timeline from a Healesville CoRE Event.

Event Time Line Dayname Day# Month 2029

| Time | Event | Responsible |
|--------|---|---------------|
| 6.40pm | Music begins (e.g. From little things big things grow); people start arriving | Person A |
| 7.00 | Welcome everyone and introduces the evening, housekeeping etc | MC |
| 7.05 | Introduce CoRE etc | President |
| 7.15 | Sub groups give a quick rundown of their roles | All subgroups |
| 7.25 | MC introduces Speaker | MC |
| 7.30 | Presentation | Speaker |
| 8.30 | Last questions from the audience | MC |
| 8.35 | Thank you and gifts and supper | MC |
| 9.00 | End of night | |

12 Out-Of-Pocket Expenses

Volunteers may incur out-of-pocket expenses when undertaking agreed activities on behalf of HCoRE. Following is a template for an expense claim form for volunteers.

Healesville CoRE Expense Reimbursement Policy (Finance06) has an Expense Reimbursement Claim Form which a claimant must complete and send to the Treasurer for reimbursement to be arranged.

13 Budget and Expense Recording

All expenses for an event should be recorded. Essentially a pre event budget should be prepared to ensure there has been sufficient funding allocated. Below is an example of event expenses; these items can be used as prompts for preparing a budget for future events.

Healesville CoRE Community Presentation – Dayname Day# Month 2029

Final Costs – GST inclusive (where applicable)

| Item | In Kind | Expense | Income | Finance Source [In Kind Source] |
|--|--------------------|---------------------------------|----------------|--------------------------------------|
| Hall Hire @\$27.50/hr Insurance | | \$110.00 \$55.00 | | HCoRE HCoRE |
| Promotion • Poster design • Poster printing • Facebook advert | | \$182.00 \$126.30 \$30.23 | | HCoRE HCoRE HCoRE |
| Display and printing • HCoRE info and m/ship forms | \$5.00 | | | Person A |
| Catering • Tea, coffee, milk, sugar, biscuits • 100 Scones • Flans x 5 • Fruit | \$60.00 | \$28.05 \$20.00 \$32.40 | | HCoRE HCoRE Person M. HCoRE |
| Ticketing through Eventbrite | \$50.00 | | | Person B. |
| Filming of presentation | \$100.00 | | | Person H. |
| • Technical support including: • Power boards • Extension lead • Laptop • Data projector • Microphones • Speakers | \$200.00 | | | Venue Person H. |
| Gift for presenter • Gift | \$25.00 | | | Person G. |
| Dinner for presenter and HCoRE guests | \$63.97 \$63.97 | \$37.07 | | HCoRE Person B. Person M. |
| Gold Coin Donations | | | \$74.80 | |
| Evaluation • Printing • Pens | \$9.00 | \$19.96 | | Person S. HCoRE |
| TOTALS | \$576.94 | \$641.01 | \$74.80 | |
| Finance Result | | | | (\$566.21) |