

Planning and Leading a Major Activity

Lesson Objective: CAP managers are responsible for ensuring that the three key CAP purposes of Aerospace Education, Emergency Services and Cadet Programs are conducted in the most professional manner. CAP uses activities and events to train its members in each of these areas. Being able to plan, manage and execute a major activity or event is paramount to the success of the activity.

Desired Learning Outcomes (DLO):

1. Discuss the importance of planning to ensure a successful activity
2. Explain the value of a continuity book and how it is used in the planning and execution of an activity.
3. Describe the main components of an operations plan and safety plan and contrast it with a continuity book.
4. Develop a plan to successfully conduct a major activity including cost requirements.
5. Consider volunteering to be a member of a wing (region)-wide planning committee - Wing/Region Conference, Cadet Activities like encampments, OPS events, etc

Scheduled Lesson Time: 90 minutes including exercises/discussion

Introduction

There are many forms of major activities or events within Civil Air Patrol. You have probably encountered large activities at work, in the community or in other interests. Major events offer an excellent venue to exchange information and experiences to a wider audience. Training a wider audience is a more optimum use of resources. The audience in our case would be at the squadron, wing, or region levels. Each level would involve larger and more diverse groups of members.

This lesson will be geared towards the five (5) Desired Learning Outcomes. But first we will discuss and understand – why are major activities important to CAP members.

Importance of major activities or events

Civil Air Patrol uses major activities to train its members among its three key purposes: Aerospace, Cadet Program and Operations (or Emergency Services). A well-run and organized activity is a major contributor to retaining members. The members receive training or knowledge, laying a groundwork of learning (and fun!) experiences that they will need as they advance in the Civil Air Patrol program. Informative and fun activities encourages members to attend additional events and eventually join events staffs. If anything, finding new members to plan and direct future events should be one of the goals of any activity. We will discuss best practices and tools available to ensure success and desired outcomes.

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What is the importance of planning to ensure a successful activity?

If you cannot tie your activity to goals, and show that you've accomplished them, how can you tell if your activity is successful? The answer is in what you planned the activity for. Is the activity meant to provide good training for members? Increase retention through members' continued involvement in future events? Are you supporting the community in some way? Does the activity support goals of local unit, wing, region or national levels?

Name some large-scale CAP activities/events that would involve planning.

Large-scale is only a number reference that is influenced by the capacity of the event or the success of previous events. They can be hosted at any level for any aspect of CAP.

What are key steps involved in planning?

There are many ways to plan an event. This 10-step plan is a reference to enhance your discussion about planning.

Recommended 10-steps in planning: (resource #1)

1. Develop Event Goal and Objectives

- The very first step is to establish a tangible goal and objectives. (e.g., *why are you organizing this event and what do you hope to achieve?*)
- If you know your organization's key goals before planning, you can ensure that every part of your event is optimized for success. Are you trying to raise awareness for a cause, or collect a predetermined amount of donations for your next project?
- Setting a goal drives with quantifiable metrics of success will make it easier for your team to ensure that you reach your goals. Event registration software can also come in handy for tracking event attendees, collecting ticket payments, and more.
- Has this event been held/done before? If so, is there documentation on the event and its outcome(s)?

2. Organize a Team

Any event takes a concerted team effort to handle all of the details. Consider identifying one key Event Manager or Event Chair as well as individual Chairpersons for subcommittees, such as:

- venue management;
- speakers;
- entertainment;
- publicity;
- sponsors;
- volunteer management

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Assigning individual roles to team members creates a system of accountability, as well as preventing tasks from falling to the wayside.

3. Set a Date

The date might already be pre-set for a recurring event, but if this is a new event, be sure to consider the following before firming up your date:

Give yourself enough time! Ideally, you should have 4-6 months to plan (depending on the nature of your event)

- Be aware of statutory and religious holidays
- Avoid school holiday time periods (e.g., winter, spring and summer holidays)
- Check dates with key participants – e.g., speakers, presenters, VIP guests, etc.
- Once you've set your date, book your venue immediately. Your event has to have a date and location nailed down before you can begin advertising, so this task needs to be completed as early in the planning period as possible.

4. Brand Your Event

If you want your event to stand out, you need to choose a timely and compelling theme that sets you apart from your competition. This means that you need to come up with a dynamic overall theme and you need to take great care with the actual name – since it can be a key attention-getter, especially in online media.

- ***Brainstorm names:*** When you are brainstorming the event name, think about:
 - how is your event different from other events in your sector?
 - what are you hoping to convey through this event?
- ***Create a Tagline:*** Once you've come up with a name, also try to craft a tagline – a short, memorable branding slogan that describes the event.
- ***Design a Logo:*** The final step will be having a logo created to represent your event. A logo can be an effective branding tool – offering immediate recognition of your event in all of your publicity and promo items (e.g., t-shirts, water bottles, bags, etc.)

Once you have your name, tagline, and logo, use it in all of your marketing collateral! A catchy or pithy tagline can be invaluable on social media when used as a hashtag. It also sticks in your audience's mind and keeps your event in their thoughts.

5. Create a Master Plan:

This plan, and it may be a Operations Plan (will discuss in next section) should encompass all aspects of the event, including:

- Venue, logistics, & catering management (contracts, permits, insurance, etc.)
- Speakers/presenters (identifying, confirming, logistics & management)
- Activities/entertainment
- Publicity/promotion (online & off-line, e.g.: web page & online promotion; events calendars; printed programs; media relations; signage; social media, etc.)
- Registration (online sign-up, payment and tracking; on-site sign-in, etc.)
- Sponsor/partner management
- Volunteer management

While planning your event, consider creating a detailed timeline, so that everything moves smoothly. Include when any permits or insurance policies need to be submitted, when registration ends, and a timeline of the day-of.

6. Determine Administrative Processes

In other words, how are you going to keep track of your planning, registration, budget, guest and speakers lists, etc.?

Create an event and manage your registration through an online event management system.

7. Identify and Establish Partnerships & Sponsors

Are there organizations that you could partner with or call on for sponsorships to defray the costs and increase potential participation? When you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success.

You might want to consider:

- Seeking **corporate sponsors** to fund a portion of the event. This can range from national organizations that might want to sponsor a dinner, offer a door prize or a key silent auction item, to local businesses that might be able to provide goods or services, such as flowers for the tables, gift bag items, etc.
- Partnering with **community organizations** who might be able to offer a venue and/or assistance with organizing or staffing an event.

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When you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success.

8. Create a Publicity Plan

Even with the most amazing speaker or entertainment line-up, you need publicity to get people in the door. Event promotion starts with the initial notice or page on your website, note in your newsletter or email to save the date, and then builds to include online and off-line publicity, media relations and on-going outreach to encourage registration. And no plan is complete without the post-event thank-you's, sponsor acknowledgements and articles about the event's key messages or fundraising success.

9. Establish a Budget

Your budget should incorporate estimates for all of the key items identified on your Event Master Plan. Don't forget to include any travel or accommodation costs for speakers, presenters, etc.

Will you need unit/wing/region finance committee approval? How will all financial matters be handled. These should be included in the master plan.

10. Determine Evaluation Process

How will you determine if your event is a success? Do you measure success by the number of registrants or attendees or is it dependent on you breaking even or raising a target amount in donations?

When you set your initial event goals and objectives, you should also consider how you will evaluate the event to determine your success.

The continuity books and after-action reports (AAR)

Continuity Book: A guide or reference book developed by an incumbent to assist in daily responsibilities and that can be passed to the successor. A way to stop ‘reinventing the wheel.’

What should be in the book? Suggested but not limited to:

TAB	TITLE
Tab A	Table of Contents
Tab B	Brief job description of inspection monitor responsibilities within respective work centers (Roles and Responsibilities).
Tab C	Have an organization chart showing your level, with one level higher and one level lower, as applicable.
Tab D	Appointment List
Tab E	List of Applicable Guidance: List any applicable guidance for you specific positions (e.g. the guidance that addresses your specific duties).
Tab F	Policy Letters: Include any policy letters that are developed to enhance or define your daily procedures, as applicable.
Tab G	Unit Compliance Inspection
Tab H	Include Major Findings and Repeat Write-Ups
Tab I	Special Interest Items

After Action Report (AAR):

A tool for leaders to provide feedback on a task or training event and how it could have been done better. It is not meant to be a negative or critical, but to highlight areas that worked and/or needs improvement.

It should be done as soon after the event as possible. This can be in the form of the report or a review since both accomplish the same goal – improving and providing the best possible for the member. The AAR is not the same as a debrief as its goal is to determine intended vs actual achievements.

AARs have three central objectives:

- Identifying problematic issues and needs for improvement
- Proposing measures to counteract problematic elements
- Obtaining “lessons learned”

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Structure

1. Overview
2. Goals and objectives
3. Analysis of outcomes
4. Analysis of the performance shown on critical tasks
5. Summary
6. Recommendations

Describe the main components of an operations plan and safety plan; contrast it with a continuity book.

Operations Plan: Sets out the tasks that a unit needs to perform in order to reach a certain outcome.

Safety Plan: management commitment and employee involvement, worksite analysis, hazard prevention and control, and *safety* and health training

OPERATIONS PLAN	SAFETY PLAN
Purpose	Hazards
Activity Description	Risk Management
Flight Operations	Personal Awareness
Ground Operations	Weather
Communications	Operating Area
Safety	First Aid Locations
Uniform Requirements	Emergency Contacts
Administration	ICS 208
Logistics	
Contingencies	
Staffing Requirements	
Radio Procedures (can be part of Communications)	

These are different from the Continuity Book. In what way? (Group discussion)

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Exercise

- Develop a plan to successfully conduct a wing conference including cost requirements.
 - Conference will be held in eight months.
 - Initial funds are \$2,500 but conference should be self-sufficient.
 - No dinner will be held afterwards.
 - Last year's conference had 100 members attend, 10% of wing membership.
 - Members who organized last year's conference left no notes and are no longer involved in CAP.

Lesson Summary and Closure

Members should consider volunteering to be a member of a wing (region)-wide planning committee - Wing/Region Conference; Cadet Activities like encampments; OPS events, etc. As a volunteer member of Civil Air Patrol, the experience gained during the management and execution of the event can be leveraged into a resume. Skills that are always in demand. Understand the importance of good, solid planning. Documentation is key to future success. What worked well one year, might not necessarily work the next time without a small adjustment. But don't change just for the sake of change. Be open to new ideas and methods.

Resources and Guides:

1. Apricot by Personify
2. Eventbrite: Blog on event planning
3. CAPP4, Event Planner Guide
4. CAPP3, Guide to CAP Protocol
5. Federal Emergency Management Agency, Incident Management Handbook, FEMA B-761, November 2017
6. ["The After-Action Review". www.au.af.mil.](http://www.au.af.mil)
7. US Army [A Leader's Guide to After-Action Reviews](#) (TC25-20)