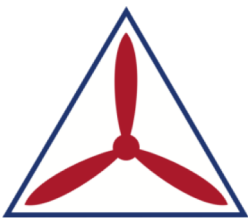


Level IV:

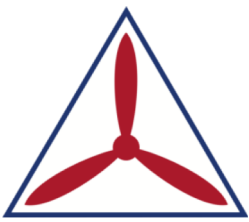
# Planning and Leading a Major Event

Lt Col Edward A. Bos, CAP  
Adapted from the Volunteer University Slides



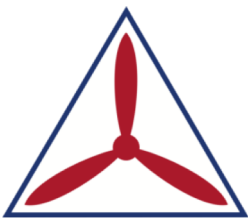
## Desired Learning Objectives

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



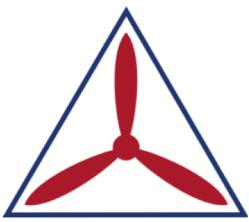
## Supplemental Topics

- Event/Activity Selection
- Meetings
- Planning Steps
- Budgeting
- Event Promotion
- Making Purchases
- Conducting the Event
- Close-Out



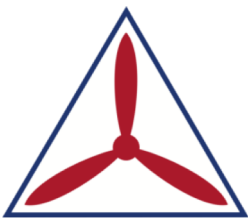
## Discussion Question 1

*What are some large-scale CAP activities or events that would involve planning?*



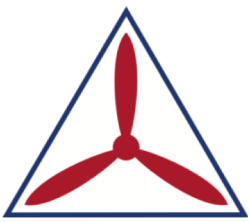
## How is Planning Related to Success?

- Wing/region conferences
- Wing/region award dinners
- SAREX
- PD training sessions
- Community ceremonies
- Unit/wing/region supported activities



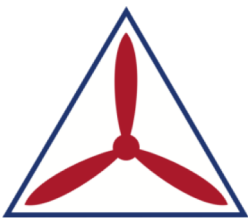
## Bonus Discussion Question

*Why Hold Activities?*



## Why Hold Activities?

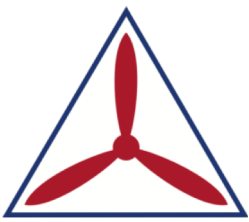
- Activities are important to support the three missions of the Civil Air Patrol.
  - *SAREXs*
  - *Cadet activities*
  - *Aerospace Education opportunities*
  - *Conferences*
  
- Specific and well-defined objectives
  
- Ask, “Does this supplement programs?”
  
- It is not the responsibility of a unit or wing to provide events just to have them.
  
- Activities are planned to assist leaders in accomplishing goals and mission objectives.



## Discussion Question 2

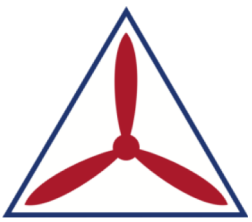
*What is the importance of planning to ensure a successful activity?*





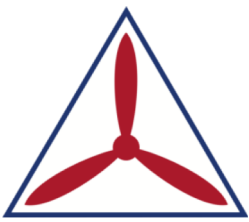
# How is Planning Related to Success?

- Provide good training for members
- Morale
- Safe event
- Cost effectiveness
- Continued involvement in future events
- Community support/relations
- Save lives
- Support goals of local unit, wing, region or national levels



## Discussion Question 3

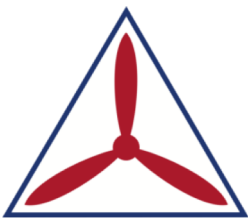
*What are the key steps involved in planning?*



# 10-Step Planning Process

## 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?)
  - The command team should have input or feedback on this step
- 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.
  - SMART Goals (specific, measurable, achievable, relevant, time-bound)
- 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)?



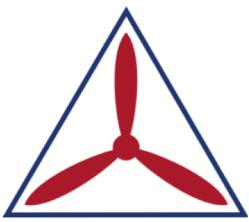
# On Goal Setting

## ➤ Safety & Risk Management

- Safety Officers should be asked to help identify risks and mitigation
- To maintain security, CPPT and common-sense indicate that we should have a protocol to maintain a safe environment
  - All CAP attendees should be in uniform, and visitors issued some form of identification:
  - A color-coded wristband program
  - A conference-style name tag
  - An event-specific badge
  - Anyone found not wearing the proper identification should be directed to your registration team
  - Check in procedures should be posted in a key location of you are expecting day participants or visitor

## ➤ Ensuring Maximum Participation

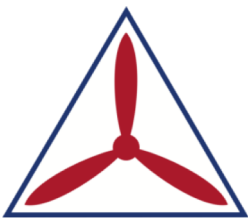
- Health Services Officers can be helpful in discussing reasonable accommodations
- Consider and invite other stakeholders to have input or feedback in these areas
- Additionally, CAP regulations, local laws, and good judgement should be considered



# 10-Step Planning Process

## 2. Organize a Team

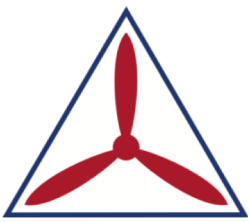
- Any event takes a concerted team effort to handle all of the details. Consider identifying one key Event Manager or Event Chair as well as individual Chairpersons for subcommittees, such as:
  - venue management (liaison)
  - speakers
  - entertainment
  - publicity
  - sponsors
  - volunteer management
  
- Who has the skills? The time? The interest?
  
- Assigning individual roles to team members creates a system of accountability, as well as preventing tasks from falling to the wayside
  - Appointment memo with scope of activity



# 10-Step Planning Process

## 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.



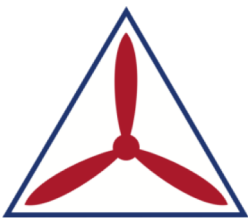
# On Venues

## ➤ Facilities

- Where you actually conduct your event.
- CAP property or on off-site location, such as a church, park, community center, even hotel or banquet facilities.
- Things to consider when booking it: price, bathrooms, accommodations, location, accessibility, safety, food services, security.

## ➤ Logistics

- Sometimes your facilities come up short. Not enough bathrooms; no food service; the size of the venue is overly large, etc. That is where logistics comes into play. If you cannot provide a toilet for every 15 overnight participants or 30 people for a day event, or a shower for every 20 people bivouacing, you may need to rent and provide for those facilities.
- Do you need to order a dumpster? Is the trash policy pack it in/pack it out? Costs for dumpsters and port-a-lets are built into the budget template.
- If your event covers a lot of geographical territory, you might need to arrange transportation (such as golf carts or vans) to bridge the distance in a timely manner.
- Proper set up for your event: such as tables and chairs for program and meal areas.
- Logistics is also responsible for returning the facility to pre-event conditions (or better!)

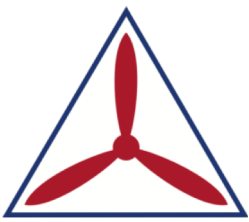


# 10-Step Planning Process

## 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

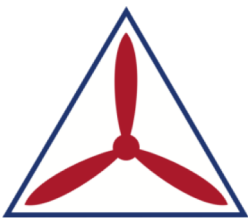




# 10-Step Planning Process

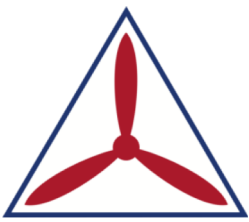
## 5. Create a Master Plan

- May be a Operations Plan (will discuss in next section)
- Should encompass all aspects of the event:
  - 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
- Create a detailed timeline, so that everything moves smoothly.
  - When any permits or insurance policies need to be submitted
  - When registration ends
  - Agenda for day(s) of event



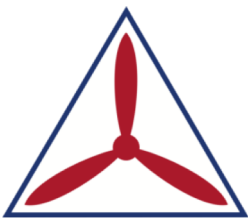
# Master Plan: Back-Dating

DAYS PRIOR	DUTIES
-210	Recruit Project Officer/Activity Director
-180	Select Location, Date Add to the calendar
-150	Recruit Staff
-120	Preliminary Planning Meeting
	Prepare Budget
	Develop Promotional Materials and distribute after approval
-90	First Staff Meeting
	Promote IAW Marketing Plan
-75	Distribute Media Releases
-60	Second Staff Meeting
	Promote IAW Marketing Plan
	Order Custom Items
-45	Call Attendees, Units, etc.
-30	Promote IAW Marketing Plan
	Early Registration Deadline
	Complete material orders
	Third Staff Meeting
-20	2nd Call to Units
-14	Registration Deadline
	Reconfirm Physical/Logistics Arrangements
	Check-In with Staff Members
-5	Final Check on Details
0	Activity
	Record additional at-the-door registration and maintain for final reports.
+7	Return Equipment; Send Thank You Letters; Submit Receipts for Cash Advances; Host After-Action Meeting with Staff; Prepare Close Out Report for commander



# Master Plan: Format

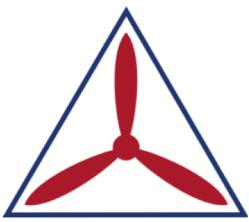
<b>OPERATIONS PLAN</b>	<b>SAFETY PLAN</b>
Purpose	Hazards
Activity Description	Risk Management
Flight Operations	Personal Awareness
Ground Operations	Weather
Communications	Operating Area
Safety	First Aid Locations
Uniform Requirements	Emergency Contacts
Administration	ICS 208
Logistics	
Contingencies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



## Discussion Question 4

➤ *How do these documents differ?*

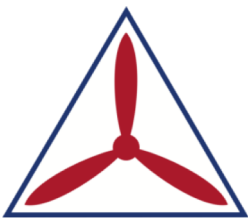
- Continuity Book
- Operations Plan
- Safety Plan



# 10-Step Planning Process

## 6. Determine Administrative Processes

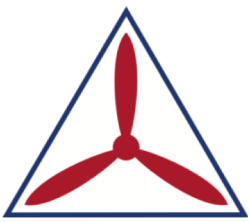
- In other words, how are you going to keep track of your planning, registration, budget, guest and speakers lists, etc.?
- Create an event and manage your registration through an online event management system.



# 10-Step Planning Process

## 7. Identify and Establish Partnerships & Sponsors

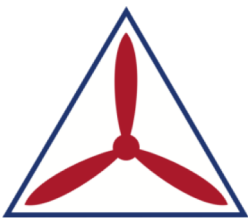
- Are there organizations that you could partner with or call on for sponsorships to defray the costs and increase potential participation? When you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success.
  
- You might want to consider: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



# 10-Step Planning Process

## 8. Create a Publicity Plan

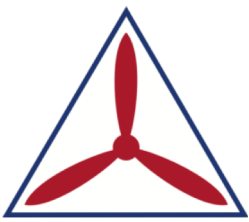
- Even with the most amazing speaker or entertainment line-up, you need publicity to get people in the door.
- Event promotion starts with the initial notice or page on your website, note in your newsletter or email to save the date, and then builds to include online and off-line publicity, media relations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



# On Event Promotion

- **Draft Promotion Materials**
  - Materials should be attractive and informative
    - Flyers & handouts
    - Social Media Information
    - Wing Calendar
    - Unit Website
    - Include Registration links/information (cost, deadlines, how to sign up, point of contact, phone)
  
- **Materials should come out early, and often**
  - As early as possible, to encourage people to plan for the event
  - It takes several attempts to fully communicate information and get someone to take action
  
- **Don't forget press releases and personal invitations to other non-CAP stakeholders**





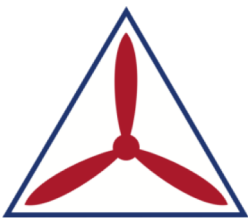
# On Event Promotion

## ➤ Payment Methods

- Online registration may use credit cards or payment at the door
- Cash and checks can be accepted, but expenses may not be paid with them UNTIL these are deposited into CAP bank accounts
- Receipts should be issued, receipt books can be purchased at Office Depot

## ➤ Refund Policy

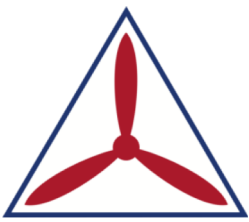
- A clearly stated refund policy should be included when people sign up
- Some costs are unrecoverable after a certain date, and late refunds may not be possible



# 10-Step Planning Process

## 9. Establish a Budget

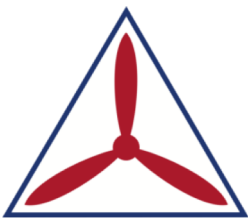
- Your budget should incorporate estimates for all of the key items identified on your Event Master Plan. Don't forget to include any travel or accommodation costs for speakers, presenters, etc.
- Will you need unit/wing/region finance committee approval? How will all financial matters be handled. These should be included in the master plan.



# On Budgeting

## ➤ Income

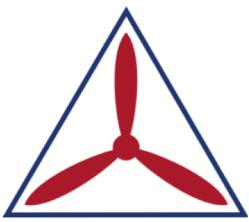
- Determine the fee for participants:
  - Was there a surplus the previous year?
  - Did donations offset fees, and would you receive those donations again?
  - On the other hand, were expenses too low?
  - The contingency should be planned to cover the other indirect costs or unexpected short fall (see next slide)
  
- Estimate attendance based on prior years
  - Do not plan for 100% attendance of the eligible participants
  - It is recommended that you conservatively plan for the same attendance



# On Budgeting

## ➤ Expenses

- Some expenses are known (cost of a dumpster etc.) and some are estimates based on previous years' experience.
- If the expenses are too high, recalculate until a reasonable fee can be established for all participants
- Include a fee structure for all participants—the plan for late participants, and staff fees
- Typically, everyone who participates in an activity should pay his or her own way-- including the staff
- Staff recognition should be meaningful, but not the main expense of the budget
- Some items (such as shirts) you may need to order a few extra of each size to accommodate errors in size reporting.
- On the other hand, we don't want to over order supplies and be left with unnecessary extras.
- The contingency should be 20% on the bottom line



# On Budgeting

## ➤ Value

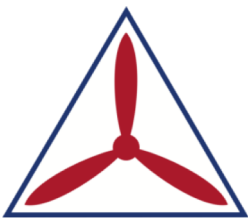
- When calculating the budget, we need to evaluate the cost versus the value
- For what the event costs each participant, can that be perceived as a good value
- We want to be sure our pricing is not too high so that we don't create an event that is too expensive for the average CAP member or Cadet's family

## ➤ Budget Approval

- As a best practice, activity budgets should be reviewed and approved by the finance committee of the echelon hosting the event

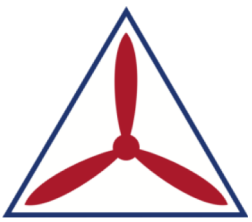
## ➤ Close-Out

- A final closeout must be submitted 60 days following the conclusion of the event.
- Project Officers and Activity Directors should plan on having them in 14 days after the conclusion of the event
- A forecasted budget can be prepared and turned in with the final report



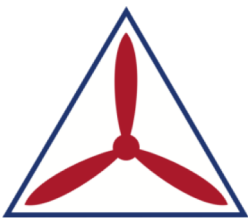
## On Purchasing

- Work with your finance officer and Wing Administrator to request assistance with purchases
- Making purchases and requesting reimbursement is possible, but discouraged
- CAP 173-series publications apply, and **ALL CONTRACTS MUST BE SIGNED BY NATIONAL HEADQUARTERS**
- All materials purchased are the property of CAP, and accounted for as appropriate
- This includes program supplies, patches, shirts, etc.



**Refer to Sample Budget Worksheet**



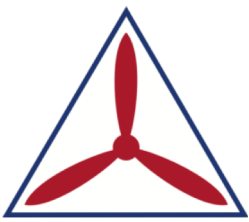


# 10-Step Planning Process

## 10. Determine Evaluation Process

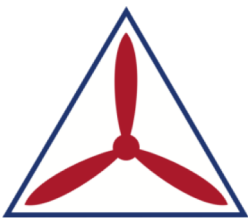
- How will you determine if your event is a success? Do you measure success by the number of registrants or attendees or is it dependent on you breaking even or raising a target amount in donations?
- When you set your initial event goals and objectives, you should also consider how you will evaluate the event to determine your success.





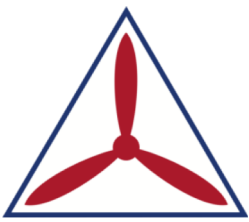
## Conduct the Event

- What is your role *during* the event?
- KISMIF
- Invite the community! (if appropriate)
- Having a bookstore or canteen at the event can be beneficial from a program and budget point of view
  - Be sure to have ample products
  - You must approach Vanguard (first) to supply any items that have CAP trademarks (emblems, name, etc.)



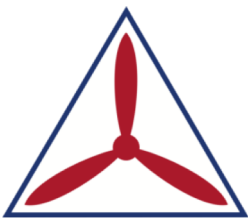
## Conduct the Event

- How are we checking people in?
  - Verifying registration
  - Accepting/handling cash
  - Managing handouts, promotional items, class materials, etc.
  
- Safety & Security
  
- Coordinating with venue/vendors
  
- Perishable food should be distributed at the end of the event



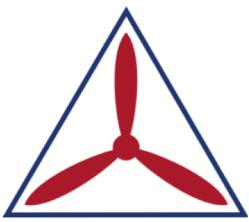
# Close-Out

- **Final Transactions, ASAP following the event:**
  - Turn in all cash payments received.
  - Turn in all vendor invoices and packing slips.
  - Turn in receipts for purchases made.
  - Turn in any paperwork.
  
- **Hosting an After-Action Meeting**
  - The Project Officer/Activity Director will be able to properly evaluate the success of the event and seek recommendations for improvements for next year
  - Have the staff provide both positive and negative feedback
  - The leadership for next year would like to continue what is right and fix what is wrong
  
- **Complete a Final Activity Report**
  - Complete a closing report with as much detail as possible
  - Use the CAP memorandum template
  - Be sure to include final numbers, recommendation for facility, program and staff, and a suggestion for the next project officer if the current one will not be returning to that duty



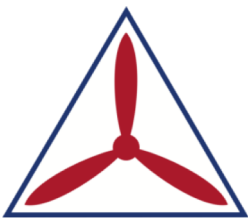
# Administration & Continuity

- **Continuity Book**
  - Reference book/Guide
  - Developed by an incumbent
  - Passed to the successor
  - Stop “reinventing the wheel”
  
- **See sample OneNote or Google document**



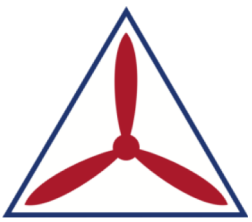
# Administration & Continuity

- **After Action Reports (AAR)**
  - What worked & what didn't
  - Done ASAP after the event, while information and ideas are fresh and may be acted on
  
- **Objectives of AAR**
  - Identifying problematic issues and needs for improvement
  - Proposing measures to counteract problematic elements
  - Obtaining “lessons learned”
  
- **Include it in the Continuity Book/Records**



## Class Activity

- **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.



# What Questions Do You Have



Please complete the course check-out form prior to logging off: <https://forms.office.com/r/vM6fQfbqMz>