



# AMERICAN CANYON ARTS FOUNDATION

## Board of Director's Policy Manual

### Event Planning Policy

Adopted/Revised:

November 12, 2013

#### I. Purpose/Intent

Much of what the American Canyon Arts Foundation (ACAF) does is event-based, either to raise funds or to support our mission, or hopefully, both! This policy provides the basic outline and forms needed to produce a successful event, and to properly document the steps and outcomes for our Annual Report, and to help members produce the event in the future.

#### II. Authority

The Board of Directors has the authority to establish policies under Article 12, Section 2 of the By-Laws, and approved this policy by adopting Resolution 2013-03.

#### III. Policy

##### ***Section One: General Policy***

ACAF's policy is to limit the number of annual events to those that are most mission-related and are likely to produce the largest amount of net revenues, due to our limited amount of volunteer resources and the large number of competing community groups in the area. However, once that limited number of events has been established, the goal is to consistently improve upon the planning and execution of those events, in order to generate greater levels of participation and revenues for ACAF.

##### ***Section Two: Types of Events***

1. Event may contain elements of one or all of the following categories. The distinction is based on the primary focus of the event. These distinctions are important mainly because it dictates the initial review and approval for new events.
2. Mission-related: These events directly further the ACAF mission, such as the Arts Extravaganza.
3. Fund Raising. The focus of these activities is to raise money, with the mission secondary.
4. Gallery specific. If the primary objective is to help raise awareness of, or money for, the Gallery, then it fits into this category, even if it could also fit other categories. Typical examples include Artist Receptions, Seasonal Marketing in the Boutique, and Art Demonstrations.

##### ***Section Three: Authorizing New or Recurring Events***

1. Given the limited resources of a volunteer non-profit organization, we need to be careful that we do not over extend ACAF's schedule of events. Any new event proposal should be able to demonstrate how it fits the mission of ACAF; adequate short-term and long-term participation levels; and how cost-effective the event will be (that is, the expected revenues will greatly outweigh both the out-of-pocket costs and the volunteer resources of ACAF, such as through the use of partnerships with other organizations).

2. Gallery specific events should be presented to the Gallery Manager for consideration and approval. Mission-related and Fund Raising events should be proposed initially to the Executive Committee, and then to the full Board for authorization.
3. Recurring events may be canceled if they no longer meet the same criteria above (mission related, participation levels, and cost-effectiveness). However, reasonable efforts should be taken to see if the event can be revived or re-designed to be more effective.

***Section Four: Planning the Event***

1. The first step is to appoint a committee. Generally, at least one Board member is appointed (and if it is a Standing Committee, there will be two Board members appointed), and any ACAF member may volunteer. One member should be appointed to take meeting notes.
2. Initially, there should be one or more planning sessions, to discuss the basic approach that will be taken in organizing and producing the event, the expected participation levels, approximate revenues and expenses; potential partners and sponsors; and a project schedule. The attached *Event Planning Worksheet* should be used to organize the planning effort and to avoid forgetting any critical steps, such as safety.
3. Some effort should be put into determining the specific starting and ending times of the event. Quite often there is confusion over the start/stop times (sometimes conflicting times are shown in printed materials), which can impact turnout. Once the times have been set, changes should not be allowed, except in very compelling circumstances.
4. In the case of annual events, there should be sufficient time allowed to properly plan, organize and promote the event. Periodic reports and updates should be made to the Gallery Manager or full Board, as appropriate.

***Section Five: Developing the Event Budget***

1. The event budget should be complete and internally consistent. For example, all anticipated costs should be included, as well as a contingency for unforeseen costs. Revenues and expenses should be based on anticipated levels of participation. For example, if 100 pieces of art is expected, charged \$15 per entry, then "entry revenue" should be \$1500. Likewise, if 300 people are expected to show up, there should be enough refreshments budgeted to handle that many people.
2. Since much of the budget is based on the level of participation, those estimates become very important. If this is a new event, there needs to be some basis for estimating the initial levels. That could be based on similar events in the past, some estimated percentage of current members turning out, etc. With recurring events, prior year activity should be considered, with some adjustments based on recommended actions from the prior year committee.
3. Event Sponsors should be solicited to help offset the out-of-pocket costs of the event. Event Sponsors will be recognized on any printed materials, such as flyers, posters and program brochures. Other sources of revenue could be from advertising in the event brochure, and developing high-end auction items for sale.

**Section Six: Marketing the Event**

1. All the good planning and artwork cannot overcome a poor marketing and promotional effort. Paid advertising is usually limited or not available at all; however, there are several free sources that can be used to get the word out about an event. Some of these sources are the following:
  - Feature articles in the local newspapers
  - Email lists and other contact information
  - Online marketing sources, such as ACAF's website, Facebook, and commercial sources that are in the business of promoting local events, such as Winecountry.com.
  - Handbills and posters
  - Interviews on Public radio and TV shows
  - Collaborating with other community or art-related organizations
2. Press Releases should be prepared and distributed. These articles help to generate interest, as well as to communicate the specifics of the event. Generally, there should be 3-4 key milestones in the life of an event, such as selecting the date, time and place; announcing a key speaker or program element, or a major sponsor; and then a reminder just before the event. Each milestone justifies a new Press Release and potential features story. It justifies sending out another email, text or Facebook post. The more creative you are in developing these milestones, the more likely they will get reported and passed on.
3. A Marketing and Promotions Manual will be produced, which will include tips on preparing Press Releases, contact information for local/regional media, as well as deadlines for submitting material. This manual should be relied upon for promoting all events.

**Section Seven: Day of the Event**

1. On the day of the event (or the preceding week as appropriate), people need to be assigned to specific tasks, such as
  - Set up and take-down,
  - Checking patrons into the event,
  - Providing refreshments, and making sure they are presentable and consistent with any health and safety standards
  - Handling any facility-related problems, such as bathrooms, and lighting
  - Selling raffle tickets and/or overseeing a silent auction,
  - Working with performing artists or artwork, as appropriate, and being able to answer any artist concerns/issues
  - Handling patron questions or concerns,
  - Event Announcer or MC
  - Safety Officer (someone who knows where the first aid supplies are kept, has facility contacts and generally views the event from a Risk Management perspective)
  - Accounting Officer, someone who will count cash and checks, track credit card sales, secure the cash and then make the deposit(s).
2. A *Roster of Event Assignments* should be filled out and used to facilitate the event and to make sure problems can be quickly resolved by the person(s) assigned. This is particularly critical for major events, such as the Arts Extravaganza.

3. Tracking participation levels is critical to evaluating the program's success. One way of facilitating this is to offer door prizes, providing the patron fills out their contact information. This also creates a contact for future follow up, such as for membership, sponsorships and marketing future events. The number of participating artists and pieces of art should be available based on entry forms. This information is also summarized and included in the Annual Report.

***Section Eight: Post-Event Summary***

1. Shortly after the event is completed, the Committee needs to schedule a "de-briefing" meeting. This meeting should provide the following:
  - Total Revenues and Costs
  - Total participation levels (patrons, artists and artwork)
  - What went well and what could be done better
  - Recommendations for next year
2. A *Post-Event Summary* form should be completed for the event, which documents the key event elements; lists the committee members, key sponsors or partners; compares estimated to actual participation levels and budget; and then notes the comments and recommendations of the committee. The Summary will be included in the Annual Report.
3. The Summary should also include copies of the Flyers, handbills, invoices, news clippings, prospectus, program brochures and other material from the event. This information is helpful in planning the event for the following year.
4. After the event has been completed and properly evaluated, a report to the Board of Directors should be provided, focused on how well the event performed in terms of net revenue and participation; whether the event should be continued or not; and any specific recommendations from the committee.

***Section Nine: An Annual Events Manual***

1. An Annual Events Manual, consisting of notes and materials from prior year event planning, will be prepared and maintained, in order to make producing future events easier, or at least to give future Event Chairs guidance on how to proceed.

**Attachments**

1. Event Planning Worksheet
2. Roster of Event Assignments
3. Post-Event Summary



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## Event Planning Worksheet

Date Prepared/By \_\_\_\_\_

<b>Event Title</b>	<b>Event Type/s:</b> <input type="checkbox"/> Mission-Related <input type="checkbox"/> Fund Raiser <input type="checkbox"/> Gallery specific <input type="checkbox"/> Other _____
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<b>Description</b>	<b>Date</b>
	<b>Time</b>
	<b>Location</b>

<b>Committee Members/Assignments</b>	<b>Stakeholders/Vendors/Sponsors</b>
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<b>Participation:</b>		<b>Budget Summary</b> (attach detailed budget)	
Estimated Artists		Estimated Total Revenues	
Estimated Entries		Estimated Total Expenses	
Estimated Audience size		NET PROCEEDS	

**Special/Unique Program Elements**

**Marketing & Promotion Plan**

**Safety & Liability Issues/Action Plan**

**Schedule/Milestones** (List activities down and then across)

Date	Task/Event	☑	Date	Task/Event	☑
		<input type="checkbox"/>			<input type="checkbox"/>
		<input type="checkbox"/>			<input type="checkbox"/>
		<input type="checkbox"/>			<input type="checkbox"/>
		<input type="checkbox"/>			<input type="checkbox"/>
		<input type="checkbox"/>			<input type="checkbox"/>
		<input type="checkbox"/>			<input type="checkbox"/>

- Attachments:**
- Detailed Budget (required)
  - Other/list:



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## Event Assignment Roster

Event Title: \_\_\_\_\_

Event Date/Time: \_\_\_\_\_

N/A	Task/Assignment	Person Assigned	Contact Info (Phone, email)
<input type="checkbox"/>	Event Chairperson		
<input type="checkbox"/>	Accounting Officer		
<input type="checkbox"/>	Safety Officer		
<input type="checkbox"/>	Announcer/Master of Ceremonies		
<input type="checkbox"/>	Facility Coordinator		
<input type="checkbox"/>	Set-up and Take down		
<input type="checkbox"/>	Checking people into the event		
<input type="checkbox"/>	Oversee Refreshments <i>(which can be donated/supplied by others!)</i>		
<input type="checkbox"/>	Selling raffle tickets or door prizes		
<input type="checkbox"/>	Managing the Silent Auction <i>(but everyone supplies items for auction!)</i>		
<input type="checkbox"/>	Marketing/Promotions Chair		
<input type="checkbox"/>	Government Affairs Coordinator <i>(handles any permits or other regulatory issues)</i>		
<input type="checkbox"/>	<b><u>Other Assigned Duties (list below)</u></b>		
<input type="checkbox"/>			



# AMERICAN CANYON ARTS FOUNDATION

## Post-Event Summary

Date Prepared/By \_\_\_\_\_

<b>Event Title</b>			<b>Event Type/s:</b> <input type="checkbox"/> Mission-Related <input type="checkbox"/> Fund Raiser <input type="checkbox"/> Gallery specific <input type="checkbox"/> Other _____		
<b>Description</b>				<b>Date</b>	
				<b>Time</b>	
				<b>Location</b>	
<b>Committee Members/Assignments</b>			<b>Stakeholders/Vendors/Sponsors</b>		
<b>Participation:</b>	<b>Estimated</b>	<b>Actual</b>	<b>Budget Summary</b> (attach details)	<b>Estimated</b>	<b>Actual</b>
Artists			Total Revenues		
Entries			Total Expenses		
Audience size			NET PROCEEDS		
<b>What Went Well?</b>					
<b>What Can We Do Better Next Time?</b>					
<b>Recommendations:</b>					
<b>Should We Do This Again?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No					

**Attachments:**

- Detailed Budget (required)
- Sample Handbills, Posters, Program Brochures, Meeting Notes, Major Invoices, etc.