

Planning a Q&B event – a practical pack of information from the Events Support Group

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You have an idea...

Growing your event – the idea isn't enough; you need a team to help you produce and run the event. A core of three to five people is a good number; don't go too big you can always ask for more help later.

Where can you find these team members?

- Approach your local and area meeting
- Think of other Friends you know who might be interested.
- Ask for an email to be circulated to Q&B membership for additional interested volunteers.

How does Q&B help?

- The events support team will act as a sounding board, link you into the Management Committee and help you with practical questions.
- Treasurer will work with you to cover costs and handle the booking/ticket monies and to refund expenses.
- Communications Team will help with marketing
- Ensures that the event and your team are covered under the group insurance
- Provides access to the email mailing list, other media and Quaker contacts
- Gives space on the Q&B website and will help in publicising the events.

Plan for Success

Every event has different goals and objectives. Just as with every organization, it is often the case that your event will have less money and other resources than it needs to achieve all of its aspirations. So, there must be choices made among the objectives so that the most important ones are achieved. Achieving those goals will then be a measure of the success of your event. These goals and objectives will be different for each event but should consider:

- The gathering theme should support the charitable objectives and aims of Q&B (and needs to be approved by the Management Committee.)
- The event should have a Quaker feel - build in times of silent reflection, 10 minutes before starting, 5 minutes after lunch, 30-45 minutes at the end.
- Desires and Expectations of the attendees – including location, accessibility and catering.
- Number of attendees and who they are (Q&B members or potential members only? Q&B members and the general public, press etc.)
- Net proceeds – Q&B events aren't expected to make a profit, but should aim to cover costs. There may be times this isn't appropriate, but any financial decisions should be referred to the Event Support liaison person and the Q&B Treasurer.

Once you have come up with a theme and vision for the event you can start to plan with a budget.

Budget

Q&B is a members funded organisation, and does not usually receive any monies from other organisations. We need to ensure that the money is spent in ways that match our charitable objectives and that Q&B's Trustees, and its members, would approve of.

While Q&B does not usually seek organisations to sponsor its events, event organisers may suggest an organisation with strong ethical credentials to the Management Committee. If they grant approval than sponsorship can be arranged.

However, the main source of income is from ticket sales for events – either for a specific item such as goody bags or refreshments, or to help pay for the running of the event (usually speakers' fees and other expenses).

- Suggested ticket cost x number of attendees = provisional budgetary figure.
- Be aware that you will be spending money before the tickets are sold. Have someone appointed to handle the money and liaise with the Treasurer.
- There is bursary help available which can cover some of the losses.

The budget, which needs to be approved in advance by at least the Clerks and Treasurer, should include the costs of:

- Room hire, with quotes from more major hirers, e.g. Friends House.
- Catering, again with quotes.
- Promotion, e.g. the price of a diary entry in the Friend.
- Equipment hire, again with quotes.
- Speaker expenses and fees, with written agreements between parties.
- Together with a rough estimate of the number of attendees required to break even.
- There may also be marketing, printing or advertising costs.

Q&B don't usually expect to pay organisers more than travel expenses – any fees must be approved by the clerking team or Management Committee.

Don't forget to ask about Quaker or charitable discounts. At Friends House, as a Recognised Quaker Group, we get 50% discount on room hire and equipment and 30% discount on food. Please note they don't show this on the quote, so ensure you've factored this into your budget.

You will need to have ticket prices for Q&B members, non-members, and students. Consider prices for other groups, such as those attending on behalf of an organisation whose tickets will be paid for by that organisation. Because of the average age of Quakers in BYM we do not offer senior discounts.

In line with our charitable objectives we offer bursaries – currently £10 paid by the attendee, with the remainder paid by Q&B. Check this, or agree an amount or number with the Treasurer.

There are a number of methods of collecting payment:

- Cash on the door (only for bursary payments of £10).

- Cheques sent directly to the Treasurer.
- BACS payments made directly into the Q&B bank account.
- PayPal, where we can insert a button directly onto the Q&B webpage promoting the event.
- Eventbrite, where promotional information needs to be included on their website.

Be aware that if people pay through PayPal or Eventbrite we pay fees for processing, albeit at charity rate, so we don't get the full ticket value. Ask the Treasurer for the current rate.

Administration and Organisation

You may want to have a generic email account to keep track of correspondence, especially if there is more than one person dealing with this. Q&B can provide access to one web based email account.

You need an accurate master attendee sheet with names, email addresses, and fees paid. We don't charge for carers who attend with participants, but the participant is charged.

Look at the *Planning a Q&B event – a practical checklist from the Events Support Group* document for more specific room and team suggestions.

Although you are creating a team to organize and run this event, you are not alone – Q&B Management Committee and the clerking team will be available to answer questions, approve decisions, and supply money, and you will have a liaison who will remind you of the time frames for those decisions (set by the twice a year MC meetings, clerks will make decisions between times).

Please note: As a Q&B supported event the format and content of the day will be the result of joint decision-making by the committee and the event organisers.

The Q&B committee's expectations of the event, in terms of charges, attendance, speakers, publicity, format, etc.

Policy & Procedures

Q&B have a policy:

To make their events Accessible, Ethical & Sustainable:

- Make sure the venue is wheelchair friendly, has a hearing loop, etc.
- Think about when and where we hold events – how will people get there? Consider public transport availability.
- Q&B catering is vegetarian. Consider where the catering is coming from.
- Ensure no disposable cutlery/crockery.

Q&B also have event insurance; the policy is available in the policies section of the website and further particulars can be obtained from the Treasurer.

For more practical advice read through the CLAS guidance supplied in this pack.

Planning to Finish

- When you started the planning what did you expect or hope that attendees would leave with?
- What do you need to do to make that possible?

Q&B website can host audio or videos of the events, and hold downloads of documents created before or after the events.

You will need to have permission from the speakers to put audio or videos and documents onto the website. To avoid confusion, ensure that permission is in writing with clear guidelines as to what is expected on both sides.

Marketing & Advertising

This is how you will get people to know about the event and decide to attend.

Q&B has a website which has the most information.

Any Marketing, from email to press release (to be put onto the Q&B website, circulated to other organisations or press) needs an:

- Event title (and usually sub-title)
- Overview paragraph, to whet the appetite
- A programme, including times and speaker profiles

Emphasise in promotion emails that bursaries are available. We hope to have at least two recipients per event to comply with our charitable objectives.

Regular emails to all Q&B members, and those on the separate Email Only list, should be scheduled. These people are the main source of ticket sales. There should be at least four of these 'mass' emails, and they need to be adjusted each time to bring in new appealing flavours – do not repeatedly sent the same information or people will become irritated and disengaged. Each email should include a link to the relevant Q&B event webpage, containing further information and the opportunity to sign up and pay to attend.

A diary entry should be placed in the Friend, usually for six weeks from two months before the event. Also consider writing a short news article introducing the event to be sent to the editors. News of the event can also be sent to Friends Journal in the United States.

Create a leaflet, using the Q&B logo and house style, to be circulated to the Q&B mailing list, added to the website as an image, and be downloadable for members to take to their meetings.

Consider who else may be interested in attending and send them an introductory email with a copy of the leaflet:

- Other Quaker informal groups.
- Local Quaker Meetings (Q&B clerks have a database of clerk emails).
- Quaker, other faith or secular schools.
- Community groups local to the area.

If you are organising an event and think that the appeal is wider (for the Event) and want to produce a press release or similar please consult with your liaison person and ensure that the wording has been approved before it is sent out.

Consider if it is necessary to print out copies of the leaflet – this may be useful if you are able to circulate them at another event such as Area Meeting, an event or YM.

Q&B have a LinkedIn group, a Facebook page, and a Twitter account – all three can be used to publicise your event.

You can ask local Quakers to promote the event at their meeting, either through Notices, copies of the leaflet, or a poster on their noticeboard.

Catering

During the planning (and selection!) stage ask the venue about catering. Check if you are allowed to bring and serve food at the venue, and if there are any restrictions regarding where food can be served and consumed.

Once you know this, you can decide if the event should be professionally catered (some venues insist on this), or done in-house by a team of volunteers. When making this decision, consider the following points:

- What facilities are there at the venue?
- Are there ways to store food, such as a fridge or freezer? Where are they located?
- What cooking appliances are there? Oven, microwave, stove? Are there cooking utensils provided?
- Is there a boiler or urn, or some other way to make hot drinks in bulk?
- Are there sufficient serving dishes, cutlery, crockery, and cups for the number you are expecting to attend?

If you decide to do the catering in-house, refer to the Q&B Catering Guidelines document.

Event Planning Timeline

Theme suggested, accepted and approved at Management Committee

Liaison person appointed by Management Committee or Event Support Group

Small group formed around original volunteer to support and shape the event.

First meeting

(usually video or conference call)

Clarifies theme & expectations from Management Committee.

Mid-Term Review

Review progress so far, date & venue approval (if not before)

Report to Management Committee should include budget, expected numbers etc.

Final go-ahead from MC or clerks

Date of this will depend on cancellation terms & conditions at the venue.

Maybe outline a process (e.g., start with a kick-off conference call, followed by a mid-term review, and the final go-ahead)

Event Timetable

- 12 months ahead – date set and venue booked for the next event of type, e.g. either Gathering in April/May at a Quaker Meeting House other than Friends House, or Conference in late November at Friends House, where at this stage a standard booking can be made for the George Fox room, with 40 people for a Working Lunch, with a PA System.
- 6 months ahead – organisers identified, most likely volunteered. A subject is selected or picked and an outline proposal is written on the subject to be explored and how this will happen with hopefully suggested speakers and format for the day.
- 4 months ahead – an outline programme and budget is available for approval by Q&B Officers. Assuming these are then agreed to, monetary spend can be committed to by the organisers and the real event preparation work can begin, including arranging speakers. Also, ticket prices are set at this time to show how the budget might balance.
- 3 months ahead (if not before) – start promotion activities based on the outline programme and ticket prices, including to the Friend, Q&B members, other Quaker organisations and relevant organisations and people outside of the Quaker community.
- Also 3 months ahead, and ongoing to the event date itself – keep going around a constant loop of:
 - a refining the content of the day and updating the information available for promotion, including on the Q&B website.
 - b collecting revenue from paying attendees and monitoring how this is faring against the agreed budget.
- 2 months ahead – for Friends House events, this is the time when we need to decide whether the event is viable to go ahead. Similarly, for events not at Friends House, a

date needs to be set when a go/no-go decision would need to be made based on their individual Cancellation Policies.