
Recommendations to Outreach for future Event Planning and Production

2 messages

Carey McDonald <cmcdonald.evrnc@gmail.com>

Mon, Apr 8, 2024 at 9:33 AM

To: Carrie Sutkin <carrie.evrnc@gmail.com>, Laurie Winston <Laurie.evrnc@gmail.com>

Dear Outreach Committee Members,

I wanted to reach out, as it's come to my attention that the organization of Events, including the documents needed for processing Events, requires some standardization to avoid unnecessary confusion, redundant work, and mistakes. There is also a need for clarification of the roles and responsibilities for Events, and a way to track progress more directly. If we can follow some protocols when planning our Events—including designating a primary Event Contact and an Event Manager, delegating tasks and tracking progress on a single document, and using shared folders for storing Event documents so they are easily accessible, I feel like things might go a little more smoothly next time.

Following is my recommendation, which I am suggesting you take up for discussion at your next committee meeting. I know it looks like a lot, but it's actually a lot of stuff that we're probably already doing. However, I believe spelling out the roles and responsibilities would help to ensure there is accountability and understanding among committee members and volunteers. **Bolded items** are the individual responsibility of that role; items not bolded are shared responsibilities. I tried to be as thorough as possible, but I may have missed some important items and steps. **Please note that this email has been sent to Outreach Co-Chairs, with Board members Bcc'ed to avoid serial communication.**

EVENT CONTACT is responsible for:

- Completing the [Event Approval Request Form](#) with the EVENT MANAGER
- Creating an itemized Event Budget with the EVENT MANAGER and help from the Committee
- **Sending the Event Approval Request Form and Event Budget to the TREASURER as early as possible**
- Reviewing the NC [Event Planning Checklist](#) with the EVENT MANAGER and verifying with the TREASURER/City Clerk on any required documents still needed for the event
- **Forwarding any communication from the City Clerk to the EVENT MANAGER immediately**
- **Maintaining communication with the TREASURER and EVENT MANAGER on progress or any outstanding requirements**

- **Forwarding the Item to the Executive Committee to add to the agenda and providing progress updates to the Board and Board President**

EVENT MANAGER is responsible for:

- Completing the [Event Approval Request Form](#) with the EVENT CONTACT
- Creating an itemized Event Budget with the EVENT CONTACT and help from the Committee
- Reviewing the [Event Planning Checklist](#) with EVENT CONTACT
- **Completing the [EVRNC EVENT TASK TRACKER](#) (with help from committee)**
- **Working with committee and board members to delegate Event tasks (noted in the EVRNC EVENT TASK TRACKER)**
- **Keeping track of progress and sending reminders when necessary**
- **Creating an EVENT FOLDER (see below) to contain ALL event documents, that is shared by all committee members**
- **Making sure we have all required documents in the shared Event Folder**

TREASURER:

- **Creates BAC for Event**
- **Sends Event Approval Request Form, BAC, and Budget to City Clerk as early as possible**
- **Forwards any communication from City Clerk to Event Contact immediately after receiving**
- **Ensures all invoices are uploaded and paid in a timely manner**

SHARED EVENT FOLDER housed on Google Drive, labeled with date of event and title (ex: "240427_Event_311Workshop"), and shared with committee members, Board President, and Treasurer:

- Event Approval Request Form
- Itemized Budget, with any updates noted with the date
- BAC
- EVRNC EVENT TRACKER listing WHO is responsible for WHAT and a DEADLINE ([This](#) is a basic format that can be copied and edited as necessary).
- RELATED MEDIA: flyers, instagram/Facebook posts, etc. (this can be in a sub-folder labeled "Outreach")
- OUTREACH PLAN with dates and volunteers (this can be a separate document added to the Outreach sub-folder, OR simply included on the EVRNC EVENT TRACKER)
- All INVOICES (this can be its own sub-folder for the Treasurer to pull from easily)
- Any Copies of insurance, permits, etc.
- Pictures from the event
- *ALL files and folders should be clearly labeled to avoid confusion*

I'm happy to discuss these recommendations with you.
Thanks for all of your hard work!

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Carey McDonald <cmcdonald.evrnc@gmail.com>
To: Carrie Sutkin <carrie.evrnc@gmail.com>, Laurie Winston <Laurie.evrnc@gmail.com>

Tue, Apr 9, 2024 at 10:14 AM

Hi Outreach,

I wanted to forward to you another possible way of tracking all the various elements of Event planning and production.

Below, I've copied a link to a file in Google sheets that Silverlake NC used for a special meeting they hosted. If you look at the bottom of the sheet, there are several tabs for tracking all of the various aspects of putting on a special event, including Action Items, Outreach, budget tracker, social media blurbs, etc. Obviously, I am not expecting us to replicate this format exactly, but I think it's a great way of keeping track of everything in one file.

Just something to think about and explore!

https://docs.google.com/spreadsheets/d/11YyNuyKhdHI30FtTNhLVK0oC5Syj4BLAuHeZKI_fTol/edit?usp=sharing

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On Apr 8, 2024, at 9:50 AM, Carey McDonald <cmcdonald.evrnc@gmail.com> wrote:

I know. It's always a struggle, and I understand there is a lack of volunteers.

The main goal I had with this is to clearly define some parameters for each role, so we know who is accountable for what, and to centralize document storage, with one reliable task assignment list that can be added to and edited as necessary. There have been too many documents emailed back and forth, and things get lost, or updated, and we want to make sure that those small oversights don't cause major issues.

I think if there are some clearly defined tasks to accomplish, it would be easier to reach out to board members and/or volunteers with a quick and specific ask. (I noticed Lauren responded to your request for

help with updating the website.)

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On Apr 8, 2024, at 9:38 AM, Carrie Sutkin <carrie.evrnc@gmail.com> wrote:

I like the idea, but we don't have enough people. Of if we do, people don't volunteer. It's always me and Maria.
So, how is this to be determined?

[Quoted text hidden]