

Colorado Driving Society Event Planning Guide

The short version:

- ☐ Choose date and location – add to club master calendar and insurance coverage for the year
- ☐ Prepare and submit (to the CDS Event Coordinator) a budget for the event a minimum of 2 months before the event. (No publicity will go out until the CDS Board has approved the budget.)
- ☐ Decide under what circumstances the event will be cancelled or postponed
- ☐ Reserve the event facility
- ☐ Arrange staffing – judges, if needed, and volunteers.
- ☐ If appropriate, prepare entry forms and/or premium books for the event. Anything to be distributed should be ready at least one month before the event.
- ☐ After budget approval, submit event information and entry forms, if any, to the CDS Event Coordinator who will review and submit them to the Newsletter Editor for publication in the newsletter, on the web and by email. Be sure to allow adequate time for review and publication – preferably submit materials 6-8 weeks before the event.
- ☐ If appropriate, arrange for advertising and sponsorships
- ☐ If appropriate, arrange hospitality for judges and/or volunteers
- ☐ If necessary, prepare any additional paperwork for the event. (Score sheets, etc.)
- ☐ Keep a record of all expenditures and keep the corresponding receipts.
- ☐ If appropriate, accept payments and process entries prior to the event
- ☐ Make sure all necessary equipment is available.
- ☐ Coordinate facility preparation and set-up for the event
- ☐ Coordinate activities on the day of the event
- ☐ Coordinate clean-up after the event
- ☐ Submit all receipts, additional reimbursement requests, entry forms, and release forms to the Treasurer.
- ☐ Submit a final financial report after the event to the Event Coordinator and to the Treasurer.
- ☐ Submit a report of the event to the Newsletter Editor as soon as possible after the event. Include pictures if possible.
- ☐ Try to get pictures to submit to the Newsletter Editor and web master.
- ☐ Volunteer to do it again!

If for some reason (lack of entries, lack of volunteers, or whatever) you feel the event needs to be cancelled, contact the Event Coordinator or the Board as a whole. The Board may decide to go ahead and hold the event anyway (lack of entries) or have someone take over the event if you can't continue with it.

Notes about event budgets (April 10, 2013):

- Organizers should expect to pay their own mileage expenses but be reimbursed for any out-of-pocket expenses such as office supplies, highway tolls when on club business, postage, etc.
- Any “leftovers” of materials purchased for an event with club funds (plates, water, etc.) should be added to the club inventory.
- The board should decide at the beginning of the year what events should involve a fee and what the fee should be.
 - Nonmember fees may be scaled based on the member fee. (Such as \$5 for free-to-member events, \$10 for events with entry fees up to \$50; \$15 for events with entry fees over \$60.) 4/10/2013
 - All events with a fee will be a flat rate, but will require membership. 2/2/2014
- Ribbons: We'll keep an inventory of ribbons on hand rather than purchasing for individual events. Ribbons will be “generic” – just the club name, logo, and placing, rather than the name and/or date of the event. Events will include ribbon costs in the budget based on the current price of ribbons. (\$2.50, 2015)
- No publicity on an event until the budget is approved.

The longer version (super long and detailed version available on request!):

- ☐ Choose date and location – add to club master calendar and insurance coverage for the year
 - ☐ If the event is proposed after annual planning meeting, consult the Event Coordinator who will check with the CDS Board of Directors to see if it can be added to the club's calendar and insurance coverage for the year
 - ☐ "Test drive" the location
 - ☐ Before proposing a new event or venue, consider:
 - Will the venue appeal to club members?
 - Will the venue welcome drivers?
 - Does the venue have adequate parking for the number of large truck/trailer rigs anticipated to attend?
 - Are there restroom facilities for people?
 - Is there water for horses?
- ☐ Prepare and submit (to the CDS Event Coordinator) a budget for the event.
 - ☐ The budget should be submitted a minimum of -8 weeks before the event.
 - Consider the date of the event and the newsletter publication schedule when figuring out when your budget must be submitted.
 - The deadline for the newsletter is the 15th of each month. Your budget has to be approved before you have a go-ahead for publicizing the event. You'll have to allow at least a week for the CDS Board of Directors to approve the budget after submission; the more involved the event, the more time it could take for budget approval.
 - ☐ Consult (through the Event Coordinator) on the member and nonmember entry fees for the event. Will there be a late fee for entries, and, if so, how much?
 - ☐ If appropriate, determine the refund policy for the event.
 - Full refund up to ___ days before
 - Partial refund up to ___ days before
 - Full refund ___ if spot [at a clinic, for instance] is filled by someone else
 - No refund after ____
 - Refund with vet notice
 - etc.
- ☐ Decide under what circumstances the event will be cancelled or postponed
 - Number of entries necessary
 - Weather
 - Snow/rain date
 - How will people be notified?
- ☐ Reserve the event facility
 - If there is a rental charge, when does it need to be paid?
 - Does the facility require any kind of statement of insurance coverage?
- ☐ Arrange staffing – judges, if needed, and volunteers.
 - ☐ If hiring a judge, get a written contract in advance of the event.
- ☐ If appropriate, prepare entry forms and/or premium books for the event.
 - ☐ Decide if entry forms should be "stand alone" (part of a premium book, for instance), or distributed as part of the newsletter.
 - ☐ Submit entry forms to the Event Coordinator for review.

- ☐ Make sure to allow time for review and printing when deciding how far in advance to submit them for review.
- ☐ After budget approval, submit event information and entry forms, if any, to the Newsletter Editor for publication in the newsletter and on the web. Indicate what publicity is desired and on what schedule. (Newsletter only? Blurb on web site? Facebook? Email reminders? To club members only? Any other forms of publicity? Any publicity costs & were they included in your budget?)
- ☐ If appropriate, arrange for advertising and sponsorships
- ☐ If appropriate, arrange hospitality for judges and/or volunteers
- ☐ If appropriate, prepare any additional paperwork for the event. (Score sheets, etc.)
- ☐ Keep a record of all expenditures and keep the corresponding receipts.
 - ☐ Submit receipts and reimbursement requests either before or after the event.
 - ☐ If necessary, arrange to have payment for judges ready at the event or mailed afterwards. (contract necessary?)
- ☐ If appropriate, accept payments and process entries prior to the event
 - Issue receipts for payments made in cash
- ☐ Make sure all necessary equipment is available.
 - ☐ Arrange for delivery of the club trailer to the event if needed.
 - ☐ Arrange to rent or borrow other necessary equipment.
- ☐ Coordinate facility preparation and set-up for the event
 - ☐ Have extra release forms available
 - ☐ Have club membership forms available
- ☐ Coordinate activities on the day of the event
 - Issue receipts for payments made in cash
- ☐ Coordinate clean-up after the event
- ☐ Submit all receipts, additional reimbursement requests, entry forms, and release forms to the Treasurer.
- ☐ Submit a final financial report after the event to the Event Coordinator and to the Treasurer.
- ☐ Submit a report of the event to the Newsletter Editor as soon as possible after the event. Include pictures if possible.
- ☐ Try to get pictures to submit to the Newsletter Editor and web master. (Take them yourself, assign a photographer, or solicit from people wandering around with cameras!)
- ☐ Volunteer to do it again!