**Role of an Event Convenor**

A Melbourne Bearbrass Probus Club (the Club) member who wishes to plan an event should follow the guidelines below.

Note that an event includes a meeting, activity, outing and tour.

**Identify and plan the event**

Factors to be considered include:

* Informally sound out other Club members to see if there is any interest in the nascent event. Raise the idea at a general meeting or other gathering to determine interest from other members
* Before identifying a date for the event, check the Bearbrass calendar and liaise with the Bearbrass “Convenor Coordinator” to ensure the proposed dates and times suit the schedule of events and the calendar
* Be familiar with the following Bearbrass policies (which can be found on the right hand side of the club website homepage, under the heading “Download Files”:
	+ Risk Management
	+ Privacy
	+ Tours and Refunds
* Consider the proposed venue location for any access issues (e.g. a location on an upstairs floor with no lift, no access for wheelchairs etc
* Identify travel methods to the event location, particularly public transport availability, the necessity to drive or car pool (and park), bus/van hire etc
* Where attendees will be paying for the event at a commercial venue, identify if the venue has any rules or requirements that should be understood in advance (e.g. no split bills or a minimum spend etc)
* If catering is involved ensure that diverse dietary needs can be satisfied
* For an event that requires a financial commitment in advance, the fact that the Club will not ordinarily reimburse “no-shows” or cancellations and that the Club will not underwrite an event, must be taken into consideration
* Seek approval for the event from the Management Committee using the Event Proposal form – otherwise it will not be an official Club event and will not be covered by Probus insurance. The request for approval will include inter alia, an outline of the event and a budget if required, in addition to any risks identified and the approach for addressing the risks.

**Create the Event in Club Runner using Event Planner functionality:**

Information to be included:

* Description of the purpose of the event and what participants can expect
* Destination/location/address
* Any costs in advance and/or an estimate of any costs at the venue (e.g.is lunch included? Are there entry fees?)
* How to provide a deposit or payment. (NB the Club bank account details are not to be included in the event descriptor on ClubRunner, because this information is available to the general public via the website home page. Club bank account details are to be inserted into the email invitation created by ClubRunner Event Planner)
* Details on meeting places, transport options, timetables and any other relevant travel information
* Closing date for bookings, deposits and final payments and whether or not a refund may be possible
* Contact details of convenor

**Issue an Invitation to Club members using Event Planner functionality:**

Things to remember:

* Identify the recipients:
	+ All club members?
	+ A sub-group of members? (NB Only when there are limitations on numbers that can attend)
	+ Include prospective members?
* Allow guests only if numbers are not restricted because members must have first priority
* As mentioned above, if Club bank account details are required, they must be inserted into the invitation text
* If feedback is required from attendees, for issues such as attendance at a meal after the event (where a booking may be required), dietary requirements etc., the “Enable comments on registration page?” function of ClubRunner Event Registration Options” should be used to capture the input
* Before sending an invitation out, always use the “Send to Myself” option to see what invitation looks like as an email. Only send an invitation out to recipients after no changes have been made to the version viewed using “Send to Myself”
* The Convenor’s contact details should be shown at the signoff to the email.

**Post Invitation Tasks**

* Receive registrations of participants using ClubRunner Event Registration facility, or through ClubRunner generated email responses for accepts and declines
* Collect deposits on time and full payments from participants via electronic banking transfers to club bank account. Contact the Treasurer to receive details of amounts, timing and source of transfers
* Organise any prepayments to organisations involved in providing services for the event by providing appropriate documentation in a timely manner to the Treasurer, who will make the payment
* If necessary, send a timely reminder email to all participants, prior to the event and advise of any changes to venue, specific activities, or requirements
* Produce attendance list from ClubRunner to show members registered to participate. The menu item to select is *Attendance* then *Meetings* then *Reports* then *Print member list/Attendance Sheet*
* A Deputy Convenor should be appointed in case the Convenor is unexpectedly unavailable on the day(s) of the Event.

**During the Event**

* Check off attendees against the ClubRunner attendance list, noting “no-shows” and “blow ins”’
* Make any required cash payments to the venue
* Take photos or ask someone else to
* Be aware of any risks
* Enjoy yourself!!!

**After the Event**

* Update attendance of all members who attended the event (if actual attendance was different from registered attendance), This is to be done using ClubRunner Event Planner/Registration functionality
* Write a paragraph or two about the event for the website and along with some photos, send to Website Officer
* Prepare a reconciliation of income received and expenses paid/to be paid and submit to the Treasurer. The Treasurer will provide the format of the reconciliation and advice as to how to prepare the document.

***Note that to assist with the planning and execution of Events, a checklist is attached.***

**CHANGE CONTROL**

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| **Version** | **Publish Date** | **Content/Amendments** | **Author** |
| 0.1 | 1st December, 2020 | Initial draft  | Cate Thompson |
| 0.2 | 26th February, 2021 | Draft including feedback received | Cate Thompson |
| 1.0 | 20th March, 2021 | Final | Mel Gray |
| 1.1 | 6th June, 2021 | Update based on practicing convenor feedback | Mel Gray |
| 1.2 | 17th March, 2024 | Update to reflect current practice | Mel Gray |