

## INTRODUCTION

### So You're Planning to Stage a Event or Activity ....

Are you planning a youth activity for your lodge? Or a charity program to raise money for your state project? Perhaps your lodge is celebrating a significant anniversary, and you want to have a evening to Commemorate the occasion. Or you are planning regular events like installation of officers, inaugural ball, etc.

Inside this guidebook, we've put together easy steps to plan and stage your event or activity. These steps are ranging from the idea to completion. By reading through this booklet, and filling out the basic worksheets. We know that you will have a plan of action for the present and the steps to complete the project. For more information contact your Area Grand Lodge or State Association Public Relations Committee.

Once you pick a event selecting a date is one of the most important decisions you will make as you begin the process of planning and staging a successful event. It can affect all subsequent steps and is worth very careful thought. Before you make your decision, here are some important thing to consider:

- Decide who you want to attract to your function. If it is a specific group of people, consult their schedules before selecting a date.
- Allow plenty of preparation time. If possible, give yourself at least two to three months to make all the arrangements.
- Be aware of major holidays, and avoid holding an event on those days. Also, if you are trying to attract local business owners or government officials, take note of special holidays when their offices may be closed.
- Try to avoid a conflict with major community events and activities such as fairs, parades, sporting events and other community celebrations. Most important, check on other scheduled Elks events that might conflict with your event.
- The best days of the week to get good attendance are Tuesdays, Wednesdays and Thursdays. People frequently find themselves too busy on Mondays to leave work, and on Fridays [particularly in the summer] they may leave town to begin the weekend a little early. Although, with Elks weekend events often work well.

## **STEP 2: Choosing the Best Time of Day**

The time of day you choose to hold your event is also crucial to its success. It's an important step in the planning process and helps determine the type of special event you will conduct. You must also consider whom you want to attract to your event.

Morning functions, for example, will have an entirely different atmosphere and style than an evening cocktail reception. Luncheon gatherings may naturally require more food and beverage. Consider the following when making your decision:

- Very few successful special events are held in early morning (7 to 7:30 a.m.) unless a special breakfast is planned. Otherwise, morning events should begin no earlier than 8 a.m.
- Luncheon events often turn out well, since most everyone eats a midday meal, but they require more advance notice in sending out invitations. Many people schedule luncheon appointments weeks ahead, and they'll need to be notified as early as possible to get your event on their calendar.
- Late-afternoon or early-evening functions appear to be the most popular and successful. Perhaps it's because guests can stop by the event on their way home, or that the day is over and there are no more business matters to interfere with guests attending your event. The best time for an evening event is 5 to 6:30 p.m., allowing everyone a chance to "drop by". Unless your event is a major one, few people will want to go home, change clothes and go out again, so avoid late evening functions beginning after 7 p.m. Always consider your guests' driving distance and their approximate arrival time.
- Avoid mid-morning or mid-afternoon time periods. Many people are reluctant or unable to break away from their own work in the middle of the day.
- One more consideration: If media coverage is important to you, give serious consideration to their deadlines before selecting a time for your event.

### **STEP 3: Developing an Invitation List**

Your event can be considered a complete success if you do nothing more than get the "right" people to attend. The "right" people will vary from event to event, but they would normally include the following:

- Potential and current members (your most important group)
- Friends and family - this is a big day for you, and you will want them there to share it with you.
- Your employees and their spouses
- Those who helped you get started - your banker, accountant, attorney or other advisors.
- Fellow members from other Lodges in your area.
- Representatives from the State Association and Grand Lodge.
- Key government officials, city council members, and county officers from the district in which your Lodge is located.
- Military dignitaries - particularly if your event has to do with veterans.
- **The media.**

Once you have identified your guest list, here are some tips to remember when inviting them:

- Prepare a nicely written letter of very basic invitation, but whatever you do, keep it simple and to the point. A formal, preprinted invitation should also be clear and concise.
- Check to make sure that all information is included: who, what, when, where and why.
- Be sure to include an RSVP. You may be in for a real surprise if you don't ask people to either return a reservation card or call you to confirm their attendance by a certain date (i.e. please RSVP by June 1). This will also help you in knowing how much food and beverage to order.
- Allow ample notice, between six and eight weeks is ideal for most events, although longer would be preferable if you are planning to invite PGERs, legislators and others whose calendars are typically full.
- Be sure to include a good map or clear instruction on how to get to your lodge or site of your event. A street address alone is not sufficient.
- If you choose to do a fancy or elaborate invitation, do it right. Get professional help from a graphic artist or designer.

- Indicate in your invitation whether the event is casual, semi-formal (often called "business attire"), or formal.
- If spouses are invited, say so. Otherwise, it will be assumed that they are not.
- Send your invitations by first-class mail, if at all possible. Bulk mail can take up to a week or longer, and delayed delivery of your invitation could seriously hurt your attendance.
- Now is the time to prepare a news release and make contact with the media. A sample news release is included in this kit.

**And a few other things to remember:**

- When creating your guest list, always consider the amount of space available for your event. Being forced into cramped spaces can irritate your guests and create a negative impression of your event.
- While it is impossible to predict how many people will attend, you can usually figure that between 25 and 50 percent of those invited will show up. The percentage of friends and relatives who attend will be much higher than the percentage of those to whom you have sent courtesy invitations or whom you don't know very well.
- Always provide easy-to-find and accessible parking for your guests. People will start off in a bad frame of mind if they experience difficulties in finding a place to park.

## STEP 4: Serving Food and Beverages

Although it's an added expense that you may want to avoid, serving food and beverage of some kind is almost a necessity for a successful event.

No matter what time of day your function is held, people will expect something to eat and drink. It's become traditional, and your event will be remembered as the exception to the rule if you choose not to offer refreshments. Here are some hints:

- For morning events, coffee, juice, fruit and pastries are perfect. Unless you are in the restaurant business or wish to go overboard to impress your guests, a full breakfast is not necessary.
- At luncheon events, remember that this is the midday meal for most of your guests, and they will expect (and deserve) some kind of sandwich or buffet meal at minimum. Do not hold an event from noon to 1 p.m. and then force your guests to go elsewhere to eat lunch.
- During late afternoon or early evening events, light hors d'oeuvres or finger foods are appropriate. Chips, dips, cheese, vegetable plates or cold cut meat trays are perfect. Avoid messy foods that might spill.
- If you choose to have a formal dinner or late evening party for your guests, make it exceptionally nice. If you are asking people to spend most of an evening with you, they deserve something special.
- About alcohol - late afternoon or early evenings are the only time alcoholic beverages (beer, wine, mixed drinks) are advisable. Many people enjoy an after work cocktail, and it can add to the enjoyment of your event. Beer and wine are often served at luncheon gatherings, but alcohol is hardly ever served in the early morning. At events where alcoholic beverages are served, always have something non-alcoholic for those who do not drink. Be sure to check with your local liquor store to determine if a permit is required. **NEVER TAKE PICTURES WITH PEOPLE HOLDING DRINKS!**
- It would be smart to enlist the help of a professional caterer for medium or large events or if you haven't the time, manpower or talent to provide your own food and beverage. Caterers can give you good, solid advice and are not as costly as you might think. Check with your local Chamber of Commerce for a list of their catering members.
- If you do decide to provide your own refreshments, be sure to have an ample food and beverage supply for your guests, as well as sufficient plates, cups, napkins, trash cans and other items. Running out of food and drink is a bad way to end an event.

## **STEPS 5: Planning a Program**

Whether you are staging a groundbreaking, an open house, fund-raiser or an anniversary celebration for your Lodge, it adds a nice touch to an event to have a brief program of some kind. (See Ritual Manual)

It provides not only valuable recognition for you and your key people, but it makes the event more purposeful and allows you to explain more about your Lodge. But consider these points when planning your informal program or formal ceremonies:

- The shorter, the better. People have brief attention spans at events such as these, and you might lose a large part of your crowd if the program drags on too long. As a rule of thumb, no program or official ceremony should last longer than 20 to 30 minutes, with 10 minutes being the ideal.
- Your program should be led by an effective master of ceremonies.
- Limit the number of speakers and the length of their speeches. People get bored easily when speakers ramble on for too long a period, so set a time for all those you ask to take part in the program.
- Introduce only those who need to be introduced, even though the temptation will be to acknowledge nearly everyone in attendance that you know. Otherwise, it slows down the program and you will invariably forget someone.
- Conclude your program with some appropriate ceremonial or symbolic activity to commemorate the event: a ribbon-cutting for a grand opening, shoveling the first load of dirt for a ground-breaking, or cutting a cake for an anniversary of your Lodge. These are nice ways to let guests know the formal program is over and they also create good publicity opportunities for your photographer.
- If your event includes an open house or tour of your facilities, be certain that friendly and knowledgeable members conduct group tours. Unguided self-tours by your guests are not nearly as valuable as guided tours.
- Speakers taking part in any formal program should include appropriate city or county government representatives, State Association and Grand Lodge representatives, Exalted Rulers or appropriate members of your Lodge.
- Be sure to send thank-you letters the day after your event to anyone who played a key role in staging it, particularly those who took part in any official program or ceremony.

- Indoors or out, any group of 50 or less usually does not need a microphone system. More than 50 people usually will require voice amplification. A portable podium or lectern is often very helpful to speakers.
- Rain can do more than just dampen your spirits - it can drench your guests and your program as well. Always try to have a back-up plan for a rainy day, which may involve moving indoors or erecting a tent.
- Consider having some kind of door prize or drawing as part of your program. It can help attendance.

### **STEP 6: Getting Media Coverage**

Without discouraging you unnecessarily, we need to be frank. The media cannot be counted on to give extensive coverage to your special event.

It's not that they view your function as insignificant, or that they are deliberately ignoring it - it's simply a matter of manpower available to cover the event and a lack of sufficient air time or print space to carry your story. The media are often swamped with business community news of grand openings and groundbreakings, and they are unable to provide good coverage to them all.

Armed with that realism, remember that there are some concrete things you can do to enhance the chances that it's your event that they choose to publicize:

- Send your invitation to the news director or city editors at least three weeks ahead of your event, and include a personal letter or note explaining some of the details about your Lodge, and why your event is different or has some significance to the overall community.
- Include a brief letter or press release that contains the journalistic basics of who, what, where, when and why. Your release or letter doesn't need to be fancy, just factual (see sample).
- A follow-up letter or reminder call the day before your event is a good idea, although some media people consider it an imposition or a waste of their time.
- See Grand Lodge Public Relations Manual for more information.

## **Sample News Release**

July 3, 2004

Contact: John Doe  
Exalted Ruler  
503-777-6161

### **River City Elks Lodge to Hold Grand Opening**

River City Elks Lodge is announcing its grand opening for its new building at 727 Boeing Blvd.

The Grand Opening and Tour will be held at the new building from 4 to 6 p.m. on Tuesday, July 25, 2004. Ribbon-cutting ceremonies will be at 6 p.m. The event is open to the public. Tours and refreshments will be provided.

Members of the local Elks Lodge recently completed construction of their new building after only six months of fund-raising and planning activities. Their previous site was damaged due to the earthquake last June and was condemned by building inspectors shortly thereafter.

Exalted Ruler John Doe is pleased with the modern and seismically updated facility and believes the public should have an opportunity to take a tour of the building.

River City is one of nearly 2200 nationwide Lodges in the Chicago-based BPO Elks of the USA. Last year, the 1.1 million-member organization contributed more than \$191 million to charitable and philanthropic programs. These include youth athletic and drug education programs, college scholarships, veteran's service, and aid for people with disabilities, the major project of the Any State Elks. The primary beneficiary of the River City Elks' charitable work is the Children's Hospital. The Lodge annually raises about \$ 10,000 for the hospital.



## **STEP 7: Using State Association and Grand Lodge Public Relations Committee Services**

By reading this information you are already taking advantage of some of the help available to you from the Grand Lodge Public Relations Committee.

And there's more. We'll be happy to speak with you and help you make some of the decisions we mentioned earlier, and also describe some of the other ways we can be of service. Some of these include:

- Providing invitation lists. Besides the people you will invite on your own, we can offer lists of our state officers, area Grand Lodge representatives, trustees, state chairmen, committee people, etc.
- Providing a list of possible speakers for your event.
- Recommendations on media coverage and releases.

### **SOME FINAL THOUGHTS ...**

The previous pages have, we hope, given you a clearer picture of what must go into the staging of successful special events. They don't happen by accident - they take careful thought, planning and attention to detail.

If you simply follow the advice we've offered, and call upon the State Association and/or Grand Lodge Public Relations Committee to help you in any way that they can, your event will be a memorable one for both you and your guests.

As a next step, use the following Event Worksheet and Project Form, letting it serve as your "road map" from start until your event is finished.

## SPECIAL EVENT WORKSHEET

Event \_\_\_\_\_

Key Contact: \_\_\_\_\_ Phone \_\_\_\_\_

Address: \_\_\_\_\_

City/Zip: \_\_\_\_\_

1. **Date/Site Selected:** \_\_\_\_\_

2. **Time Chosen:** \_\_\_\_\_

3. **Invitations:** \_\_\_\_\_

Format style (letter, formal, etc.) \_\_\_\_\_

Guest list to be developed no later than \_\_\_\_\_

Invitations to be mailed no later than \_\_\_\_\_

Name of graphic designer, printer (if any) \_\_\_\_\_

Number of invitations to be printed mailed \_\_\_\_\_

4. **Food and Beverage:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Type of meal served: \_\_\_\_\_

Name of caterer to be used (if any) \_\_\_\_\_

5. **Program/Ceremonies:** \_\_\_\_\_

How Long? \_\_\_\_\_

Format: \_\_\_\_\_

Master of Ceremonies: \_\_\_\_\_

Length of each speech: \_\_\_\_\_

Others on the program: \_\_\_\_\_

Special "props" needed (ribbon, scissors, etc.)

6. **Media Coverage:** \_\_\_\_\_

Notice of event to media no later than: \_\_\_\_\_

## PROJECT FORM

The purpose of this form is for use in PRE-PROJECT PLANNING to record the goals and objectives of the project. Then the form is to serve as a reference and guide during the progress of the project.

PROJECT PROPOSED \_\_\_\_\_

Purpose of Project:

Estimated Number of People Working on Project and for What Use?

Benefits and Comments Concerning Project Proposal:

Estimated Project Starting Date \_\_\_\_\_

Estimated Project Completed Date \_\_\_\_\_

## **PLAN OF ACTION**

Steps to Be Taken to Complete the Project (meetings included):

Publicity and Promotion:



## COMMITTEE ORGANIZATIONAL CHART

The purpose of this form is to illustrate in chart form the basic committee organization of the project. The chart is to represent the actual structure used, including both titles and names from Chairman down. This organizational chart should be prepared at the first project committee meeting.

Chairman \_\_\_\_\_

Address \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Fax \_\_\_\_\_ E- Mail \_\_\_\_\_

\_\_\_\_\_  
Project Chairman's Signature

Special Materials Needed:

**BUDGET**

Income	Proposed Budget	Actual
Appropriation from Lodges	_____	_____
Appropriation from State	_____	_____
Appropriation from Other	_____	_____
Appropriation from Other	_____	_____
Total Income	_____	_____
Expenditures		
Total Expenditures	_____	_____
Profit or Loss	_____	_____

# COMPLETED PROJECT REPORT

Name of Project: \_\_\_\_\_

Name of Lodges/State: \_\_\_\_\_

\_\_\_\_\_

Planning:

Number of Committee Meetings: \_\_\_\_\_ General: \_\_\_\_\_

Subcommittee: \_\_\_\_\_

Publicity and Promotion Used (Plus any photo/newspapers/other)

Dates of Project: From \_\_\_\_\_ To \_\_\_\_\_

Estimated Manhours: Elks \_\_\_\_\_ Others \_\_\_\_\_

Number of Committee Members \_\_\_\_\_

Number of Elks Participants \_\_\_\_\_

Number of Other Participants \_\_\_\_\_

Budget: Income Lodges/State \_\_\_\_\_

Income Other \_\_\_\_\_

TOTAL INCOME \_\_\_\_\_ Expenses \_\_\_\_\_

Final Summary: Briefly describe the project, explain what was done, give recommendations and comments, benefits to the Lodge and the community

Send all work sheets to Lodge Secretary.

This last work sheet should be used for end of the year report.

\_\_\_\_\_  
Project Chairman's Signature



