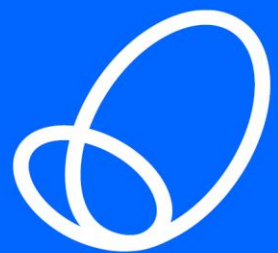


PLANNING EVENTS

GUIDELINES FOR SUCCESS

October 2017



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EVENT CHECKLIST

Use this checklist to make sure you've got everything covered.

PLANNING

- ✓ Pick type of event (site visit, panel discussion, quiz night, assessment homework night, networking)
- ✓ Gauge interest in your event
- ✓ Get approval from Engineering New Zealand to run your event
- ✓ Confirm your budget (think about sponsorship or charging a fee)
- ✓ Check your date doesn't clash
- ✓ Think about collaborating with a branch or other group
- ✓ Book the venue
- ✓ Organise catering
- ✓ Organise speakers
- ✓ Write health and safety plan

PROMOTING

- ✓ Submit to go on the Engineering New Zealand website
- ✓ Submit for an email to relevant members
- ✓ Promote on social media
- ✓ Get people to register to attend

AFTER THE EVENT

- ✓ Get feedback
- ✓ Complete an expense claim form for any costs you need reimbursed
- ✓ Share stories and photos
- ✓ Report any health and safety issues to Engineering New Zealand

PLANNING YOUR EVENT

Before you organise an event, make sure there's enough interest and support in your group to make it happen. You can run events with other groups, including other Young Engineer regions, your local Engineering New Zealand Branch and other local professional groups (eg architects, planners, accountants).

Then take the following steps:

- Check with your local Branch that they aren't planning an event for the same week, and make sure the event goes into the Branch's calendar.
- Organise a suitable, accessible venue. Consider whether it's close to public transport or has low-cost parking. Make a booking.

FUNDING YOUR EVENT

When you are applying for funding, remember that your project or event needs to benefit multiple members (specifically engineers rather than the general public), and it must have relevance to engineering.

If you don't use the funding before the end of the Engineering New Zealand financial year (30 September), then it will not be available in the next financial year.

Things likely to be successful in gaining funding include:

- catering for functions
- transport to site visits
- speaker fee or travel costs
- venue hire or koha
- admission fees for bowling or golf.

Funding applications are unlikely to be successful if:

- they benefit only a few people
- the activity is too similar to other activities that have already been given funding
- the event involves watching a performance rather than being something that encourages people to talk to each other
- they are for activities that are dangerous. You may be asked to provide an event risk plan before your event is approved, and you will need to consider your and Engineering New Zealand's obligations under the Health and Safety Act.

WHAT DO YOU DO ONCE FUNDING IS APPROVED?

Once you have the green light for your event, make sure the logistics are sorted:

- Confirm your venue (and pay any deposit).
- Book speakers. You can use our speaker brief template if you need help finding someone.
- Book any other services like transport, catering or sound.
- Take registrations online through our website. Just complete an event listing form.
- Purchase a speaker gift, if required.

- Pick someone to MC the event and put together a run sheet.
- Come up with a contingency plan, in case the speaker is unable to attend at the last minute.
- Make sure sponsors are receiving the benefits you agreed to in the contracts.

BUDGETING

You need to budget for both costs and income.

Costs might include things like catering, venue hire, fees or gifts for speakers, transport, prizes, printing, complementary tickets, equipment hire, accommodation, security fees (for some venues after hours), stationery, or petrol fees.

Some guidelines on how much to budget:

- Refreshments for a function: one drink and some food for a total of \$12–15 per person; or food costing \$12–15 and people buy their own drinks.
- Speaker gift: \$25–35 per speaker.
- Prizes for quiz night per person in the winning team: first place \$10, second \$5, third \$2.50.
- Transportation: \$3–10 per person.
- Venue hire: \$50–300 depending on location.
- If you use a consultancy/contracting firm venue: \$30–40 koha (thank you gift).
- Committee-only event (1 per year): \$25 per person.
- 4-8 committee meetings per year: \$50 per meeting for catering (small regions should hold meetings every two months).
- Social dinner with keynote speaker: \$20 per head (make sure you pay for the keynote speakers' dinners and their partners' dinners).

SPONSORSHIP

Getting sponsorship is a great way to help pay for some of the event's costs. Think about what you will offer the sponsor, eg a short speaking slot or the chance to introduce the keynote speaker, displaying banners at the event, having sponsor representatives attend the event, distributing sponsor flyers at the event.

When you are looking for sponsors, make sure only one person contacts each potential sponsor. Avoid approaching recruitment companies for sponsorship, as this can create a conflict of interest with your employer. You should also be aware of organisations that already sponsor Engineering New Zealand events, and talk to us if you'd like to approach them.

Make sure you formalise the arrangement:

- Complete a sponsorship agreement.
- Get the sponsor to sign the agreement.
- Send the contract to us, so that we can sign it on your behalf and generate an invoice.
- Give the invoice to the sponsor.

CHARGING FEES

A door fee can help you cover the costs of the event. You can use our website to take payments and issue tickets.

The minimum charge for a door fee is \$10 (including GST). If someone can't come, they can transfer their place to someone else but they can't get a refund.

Discourage people from turning up to the event with cash because this can be difficult to manage. If someone gives you cash, you need to give the cash to the venue and make sure the cash is taken off the bill (and this needs to be clearly shown on the final bill).

PAYING FOR GOODS AND SERVICES

If you need to purchase something, please ask the supplier to issue an invoice. You can then send this to us and we will pay it. It needs to be the original invoice, not a copy.

If you end up paying for something using your personal credit card, make sure you get a receipt with a GST number. You can then fill in an expense claim form, attach the receipt, and send it to us for reimbursement. Expense claims are paid twice a month.

Only complete an expense claim form if you are the person who has incurred an expense. Please do not put an expense claim form under your name on behalf of someone else.

PROMOTION

Think about the best way to reach your target audience. We can help you by advertising your event:

- in an email to relevant members
- on our website
- on social media.

If you want to make posters, check with us before using the Engineering New Zealand logo, and if you are using photos make sure you have permission to use them.

HEALTH AND SAFETY

It's important that your event complies with The Health and Safety at Work Act 2015. For us to comply with our obligations, we need to make sure that all events run under the Engineering New Zealand banner have high health and safety standards.

To help you manage these obligations, we've developed a set of checklists that you can use to make sure your event complies.

For each event, a designated person must act as the event organiser and take responsibility for completing the relevant checklist below:

- Health and safety checklist for an in-house event
- Health and safety checklist for a site visit
- Health and safety checklist for a recreational activity

These are available in the resources section at engineeringnz.org.

Alcohol

As the event organiser, you have some specific responsibilities if your event will have alcohol. Your event needs to comply with the Alcohol Act:

- Always serve sufficient food, and advertise this in your promotion of the event.
- Always serve non-alcoholic drinks.
- Make sure people are not underage.
- Make sure people do not become intoxicated.
- Don't promote the event as having free alcohol.
- Don't promote excessive consumption of alcohol.
- Don't get sponsorship of alcohol.
- Make sure the venue has the right licence to serve alcohol.

If people are entitled to 1 drink as part of the event, you can use a voucher to make this easier to manage.

These are available in the resources section at engineeringnz.org.

Food safety

As the event organiser, you are responsible for making sure that:

- Food is handled with clean hands.
- Food for special diets is kept separate.
- Catering is delivered as close to the time of consumption as possible.
- Cold food is kept cold and hot food is kept hot.

Useful resources

- Worksafe – business.govt.nz/worksafe
- Food safety – foodsafety.govt.nz
- Defibrillator – aedlocations.co.nz
- Alcohol – hospitalitynz.org.nz

SPOT PRIZES AND COMPETITIONS

Under the Gambling Act, it's illegal to give away alcohol as a prize.

Read more about the requirements around spot prizes and other types of competitions at dia.govt.nz.

PRIVACY ACT

The Privacy Act applies to any person or group that holds, uses or discloses personal information. Personal information does not need to be private, sensitive or intimate to qualify for protection.

Under the Act, personal information needs to be used only for the purpose for which it was originally obtained.

If you collect names at the door for an event, make sure the information is securely disposed of and is not used to ask people to come to other events.

If you need an email sent out to members in your region, we can send out a reminder on your behalf.

If you want to take photos of people at an event, make sure you have their permission. Ask them to sign a photo release form.