

[insert organisation name/ logo]

Event Management Policy

Document Status: Draft or Final

Date Issued: [date]

Lead Author: [name and position]

Approved by: [insert organisation name] Board of Directors on [date]

Scheduled Review Date: [date]

Record of Policy Review

Review Date	Person Initiating/Leading Review	Other People Consulted

Triggers for Policy Review (tick all that apply)

- Standard review is timetabled.
- A gap has been identified
- Additional knowledge or information has become available to supplement the policy.
- External factors
 - Policy is no longer relevant/current due to changes in external operating environment.
 - There are changes to laws, regulations, terminology and/or government policy.
 - Changes to funding environment, including requirements of funding bod(y)ies
- Other (please specify).
- Internal / organisational factors
 - A stakeholder has identified a need, eg by email, telephone etc
 - A serious or critical incident has occurred, requiring an urgent review.
 - Need for consistency in service delivery across programs and organisations.
 - Separate, stand-alone policy is now warranted
 - A near miss has occurred, requiring a review to prevent a serious/critical incident in the future

Additional Comments

[for example, policy now covers details related to new legislation].

Event Management Policy

1. Purpose and Scope

[insert organisation name] manages events according to priorities identified in its strategic plan and/or through specific project activity.

This policy provides broad guidelines on planning, managing and evaluating events by the organisation. Specific funding and performance agreements may additionally guide the management of some events.

2. Definitions

Events may include large meetings such as the Annual General Meeting, networking, training, consultation and development activities for clients, employees or others and forums, small gatherings and/ or conferences.

Event Coordinator: oversees the management and organisation of an event. Event coordination may be a specific role, part of a job description or an additional function of any employee demonstrating relevant capacity and interest.

3. Principles

Planning is adequate to manage **[insert organisation name]** events to agreed goals and available human and financial resources.

Event aims, activities and outcomes align with **[insert organisation name]**'s strategic plan.

Conference and event planning activities and outcomes are communicated with staff, Board of Directors, clients, members and other relevant stakeholders.

4. Outcomes

All events are well organised and managed.

All events are evaluated and the information collected and analysed to inform future activities and events.

[insert organisation name] events are informative and in line with **[insert organisation name]** strategic plan and program deliverables.

5. Functions and Delegations

Position	Delegation/Task
Board of Directors	Ratify budgets for events. Be aware of and contribute to events as relevant.
Management	<u>CEO/Manager</u> Support planning and implementation activities of events. Sign off (with Board signatory) on all external funding and performance agreements. Ensure management of events is in line with [insert organisation name] 's strategic direction and program deliverables.
Staff	Undertake specific tasks as delegated by [CEO/Manager] to contribute to the planning, implementation and evaluation of events. <u>[insert position]</u> Financial administration (e.g. payment of invoices) of events. Develop and/or provide advice on budgets if necessary. <u>[insert position, eg "Event Coordinator"]</u> Manage event planning and administration including: <ul style="list-style-type: none"> - promotion of event and distribution of registration and promotional materials - arranging venue and speaker/s for the event - facilitation of event organising committee as relevant - managing event budget and expenditure - preparing event materials - conducting an evaluation.

6. Risk Management

Staff appointed as event coordinators have skills in managing events.

Risk management consideration is embedded into event planning. The event coordinator will take steps to reduce risk proactively.

The event may be exposed to risks that are beyond the event coordinator and **[insert organisation name]** control. Working in partnership with external organisations is one such risk factor - Partnership Agreements, Memoranda of Understanding and other contractual relationships are likely to reduce the risk.

Individual event management plans are reviewed according to the stated schedule.

7. Policy Implementation

This policy is developed in consultation with all staff involved in planning, implementation and evaluation of **[insert organisation name]** events. The Board of Directors should also be familiar with their functions and delegations outlined in this policy.

This policy should be referenced in relevant policies, procedures and other supporting documents to ensure that it is familiar to all staff and actively used.

This policy will be reviewed in line with **[insert organisation name]**'s quality improvement system and the review of associated policies.

8. Policy Detail

Lead responsibility for the planning, implementation and evaluation of events lies with the **[insert position]**. In some instances, a specific event coordinator will be appointed, who will be responsible for managing the coordination of the event.

8.1 Planning

The management of a successful event requires a detailed planning and consultation process.

The planning process for events may involve a number of staff members taking responsibility for different tasks.

Tasks usually include:

- Convene organising committee for event
- Developing a budget
- Seeking sponsorship where appropriate
- Arranging the venue for the event and organising registrations
- Approaching potential speakers
- Promoting the event
- Preparing event materials
- Organising materials to be taken to the event
- Collecting papers for printing and distribution before and after the event
- Conducting an evaluation
- Collating feedback and reporting on event outcomes to the Board of Directors, members, funding bodies and other stakeholders.

The Managing Events Checklist and the Project Planning Policy provide details on planning events.

8.2 Budget

An adequate budget is to be identified for all **[insert organisation name]** events before other tasks are initiated. The budget should take into account expenses such as venue hire, catering, audio visual equipment and promotion and advertising costs as relevant.

For events in which a registration fee is required, registration fees should be decided based on total event expenses and a realistic number of delegates in order to reduce the risk of incurring a loss. Consideration should be given to whether the organisation aims to 'break even', make a profit or if incurring a loss is acceptable.

[insert organisation name] may receive specific funds or sponsorship to contribute towards the running of events. Where the funding is guided by a specific funding agreement, the event coordinator is responsible for meeting all deliverables set out in the agreement.

8.3 Sponsorship

[insert organisation name] welcomes sponsorship for its events from government agencies, non government organisations, charitable foundations or private companies. Sponsorship is particularly useful as it helps to reduce costs for the target group.

Sponsor contributions will be acknowledged, this may involve:

- including the sponsor's logo on event materials
- allowing the sponsor to set up a display at an event
- acknowledging sponsorship in any opening and closing address; and/or
- offering free participation to a sponsor's representatives.

Sponsorship or advertising from organisations or individuals that are engaged in business which is unlawful, unethical or damaging to public health and wellbeing will not be accepted.

[insert organisation name] will not accept sponsorship or advertising, or agree to any conditions of sponsorship, which may compromise its independence, or compromise the purpose of the event.

8.4 Venue Arrangement and Registrations

An event venue should be booked well in advance (at least a month before forums, several months before conferences). Factors that should be considered when deciding on a venue include cost, facilities, accessibility and capacity.

Registration forms should include the following: [insert organisation name] logo, event title, date and time, venue, keynote speakers/ topics, costs (if applicable), registration closedeadlines , dietary requirements (if catering) and contact person.

A list of registrations (including payment status if applicable) is to be kept for each event.

8.5 Promotion

Events are to be promoted using a variety of communication strategies including the organisation website, mail outs, appropriate networks and **[insert communication strategies]**.

If it is necessary to engage a consultant to support event planning and implementation (e.g. designing event promotional materials), refer to the External Relationships Policy and supporting documentation.

8.6 Evaluation

[insert organisation name] conducts evaluations of its events as a matter of good practice and continuous improvement. This is also frequently a requirement of funding agreements. As such, event evaluation should be considered as part of the planning process.

The specific evaluation process used may vary according to the nature of the event, or the requirements of funding agreements.

Event feedback should be collated into a short report for distribution to the Board of Directors, funding bodies and other stakeholders (report format and distribution may vary according to event type and specific funding agreements).

9. References

9.1 Internal

Communications Policy
Event Feedback Form

Integration Policy
Managing Events Checklist
Project Management Policy

9.2 External

Legislation

Local Government Regulations
Competition and Consumer Act 2010 (Commonwealth)

Other

Aylward, P., 2005, Evaluating AOD Projects and Programs. In N. Skinner, A.M. Roche, J. O'Connor, Y. Pollard, & C. Todd (Eds.), *Workforce Development TIPS (Theory Into Practice Strategies): A Resource Kit for the Alcohol and Other Drugs Field*. National Centre for Education and Training on Addiction (NCETA), Flinders University, Adelaide, Australia.

Monash University - Project Management webpage
<http://www.its.monash.edu.au/staff/projects/project-management/>

This policy is taken from the NADA Event Management Policy.
http://www.nada.org.au/index.php?option=com_content&task=view&id=236&Itemid=44

9.3 Quality and Accreditation Standards

EQuIP4

Provided by the Australian Council on Healthcare Standards (ACHS)

Standard 2.4: The organisation promotes the health of the population.

Criterion 2.4.1: Better health and wellbeing for consumers/patients, staff and the broader community are promoted by the organisation.

EQuIP5

Provided by the Australian Council on Healthcare Standards (ACHS)

Standard 2.4: The organisation promotes the health of the population.

Criterion 2.4.1: Better health and wellbeing is promoted by the organisation for consumers / patients, staff, carers and the wider community.

Health and Community Service Standards (6th edition)

Provided by the Quality Improvement Council (QIC)

Standard 2.5: Services and programs within the organisation are coordinated.

Evidence Questions: What is the evidence that:

- a) coordinates services and programs to meet the needs of consumers?
- b) delivers cross-discipline services seamlessly?
- c) supports staff working across different disciplines to coordinate services?
- d) works with consumers to review the effectiveness of coordinated services?

9.4 National Mental Health Standards

N/A

9.5 Recovery Oriented Service Self-Assessment Tool (ROSSAT)

N/A

9.6 NSW Disability Services Standards (DSS)

N/A