

## **Volunteer Planning Guide**

### **for CLA and CLA Sponsored Events**

Many times volunteers walk into a building (Highland Haus, Alpine Haus, or Castle) and have questions as to what is expected of them during an event. There may even be some simple questions like “Which lights are left on after the party?” or “Who is responsible for trash removal?”. The CLA hopes that this planning guide will be helpful in answering questions while providing guidelines that are so vital for a successful event. Remember, if you are not sure about something, please ask and get clarification about the issue. “There is no such thing as a dumb question.”

The Planning Guide is divided into three sections:

- Event Planning, including necessary forms
- Event Activities
- Event Wrap-Up

A CLA Board Committee has reviewed these guidelines. If there is anything missing, please feel free to notify your Board liaison or a current Board member. The thoughts, comments and suggestions of users are always appreciated.

The Board makes every effort to take into account the many expressed feelings of the membership before any actions are taken and events planned. The CLA Board wants all of the citizens of the Canadian Lakes community to participate in and enjoy the various activities in and around the properties. Feedback from the community is a vital part of making the community a more valuable place to live and play. Without the many volunteers who work throughout the year on the activities and projects, there would be no need for the CLA Board because the organization would not thrive.

**We appreciate each and every one of you!!**

## **Event Planning**

### **General Responsibilities**

The designated chairperson for any CLA event or CLA sponsored event can either be a Board member or a volunteer from the Canadian Lakes community. If the chairperson of the event is not a Board member, a liaison from the Board will be assigned to the event and will serve as a resource to the chairperson.

The first step in planning any event is for the chairperson to secure the event file from the CLA office and review past reports. These reports should provide guidance in terms of

- Number of volunteers needed
- Tasks to be completed
- Costs associated with the event
- Recommendations from past committees

This step should be taken as soon as a chairperson is identified so that the timetable for planning can be established, including the amount of lead time required. Access to the event files are available through the Board liaison.

### **Recruiting Volunteers**

Based upon a review of the event file, the chairperson should determine how many committee members are needed. If additional volunteers are needed, ads can be placed in:

- the *Lite Lines*
- the *Communiqué*
- the Blast
- the CLA Website
- the Canadian Lakes daily email

Placement of ads for volunteers should not run earlier than two (2) months prior to the event. The committee will need to plan carefully to make sure that these ads run on a timely basis. If the event has been held before, a review of the historical file might identify possible volunteers.

## **Planning Process**

As chairperson, it is helpful to develop a list of tasks/activities necessary to be completed for the event. If this is a repeat event, a list can be developed from reports of prior years. If this is a new event, it may be helpful to consult with members of the CLA Board to get a sense of expectations for the event.

A committee meeting should be scheduled based upon the timeline identified after a review of the file. If the chairperson is not a Board member, the Board liaison should attend the initial meeting and any other meetings as deemed necessary. The following should be accomplished at this first meeting:

- Provide each committee member with a list of the participants of the committee as well as their email addresses and phone numbers
- Review basic event planning guidelines with all members
- Determine all tasks/activities and assign to members with reasonable timelines for completion
- Establish the event budget
- No contracts are to be signed by a Volunteer for any CLA event. They must be given to the Board liaison for Board approval.
- Groups putting on a CLA sponsored event are responsible for all expenses.
- Inform all members that all CLA Expense Vouchers must have original receipts attached and be given to the Board liaison
- Advance payment requests must be made to the Board liaison to present to the Board for approval

Additional meeting dates, if deemed necessary, should be established at this time.

## **Access to Facilities**

Sanctioned CLA activities and groups have access to Canadian Lakes facilities at no cost. The chairperson should confirm that the required facility has been reserved for the date and time of the event. If use of the facility prior to the event is needed (usually for decorations or set-up), the reservation needs to include this time frame as well. This confirmation should be done by the Board liaison assigned to the event.

The Board liaison has access to the designated event facility, including cabinets. Because the Castle, Highland Haus and Alpine Haus have alarms set when not in use on the weekends and evenings, arrangements must be made with Safety prior to entering the facility during those timeframes so that the alarm is not activated.

## **Forms**

The chairperson must fill out a Work Order form if the assistance of Maintenance is needed for tables/chairs or some other type of activity set-up.

The Event Summary form is used to submit a final report to the CLA Board. This form is found in the guidelines book given to the chairperson by the Board liaison. Reports should be completed and returned to the Board liaison by the next CLA Board meeting (1<sup>st</sup> Thursday of each month).

## **Event Activities**

### **Food Selection and Service**

There are four major considerations in regards to food:

- The committee should determine a menu
- If catering is required, a licensed caterer with an offsite kitchen should be selected
- A review of prior reports will help to estimate the number of people attending the event
- Complete the “Catered Event Planning” (Form 1007) and give to the Board liaison
- Final selection of menu will depend on: budget, number of people attending, type and quality of food available

One committee member should be designated to coordinate the food service. If a caterer is needed and a deposit is required, contact the Board liaison to secure a check from the Board Treasurer. Arrangements should be made with the Board liaison to secure final payment, if needed, prior to the event.

One of the CLA Board members is designated as the individual responsible for maintaining basic supplies for the CLA sanctioned activities. Contact this Board member to review needs for the event, i.e., paper products, condiments, coffee, tea, etc. If additional supplies are needed, prepare a list for the Board member to purchase the needed supplies.

The committee should purchase items other than basic supplies such as special table cloths, snacks, special drinks, etc. Maintaining the budget for the event is important. Dollar stores can be a very good resource. Sales at Meijers, etc. can offer other options. The CLA has accounts at the Gordon Food Service in Mt. Pleasant and also at Hixson's Family Market in Canadian Lakes. Purchases at Gordon's or Hixson's must be made by the Board liaison. Arrangements should be made to have supplies available in ample time prior to the event.

### **Miscellaneous**

- Coffee pots or large cold drink containers may be moved from one location to another depending on where the event is being held.
- These coffee pots or large drink containers **must** be cleaned thoroughly and returned to the original location.
- The Board liaison will have access to all of these items and to any locked cabinets.
- There is an upright freezer and refrigerator in the Castle that will hold bags of ice purchased by the committee. There are also refrigerators with top freezers at the Highland Haus and the Alpine Haus.
- The Castle freezer should be set at a minimum of 7 for items to remain frozen.
- Recipes for making coffee, ice tea, lemonade or hot chocolate are on the packets of each. Procedures for using the coffee pots are posted by the pots.
- If drip type coffee is being made in large pots, the person in charge of food service should obtain the correct recipe.

## **Alcoholic Beverages**

For any building in the community covered by the state liquor license, (Castle and Canadian Lakes Restaurant), event participants are **not permitted** to bring their own alcohol onto the premises. Liquor **must be** provided by the CLPOC.

For any event in a location not covered by the state liquor license (Highland Haus and Alpine Haus), a B.Y.O.B. is acceptable.

## **Entertainment**

If entertainment, such as a DJ or a band is planned for the event, the committee should select one member who will be responsible for ongoing contact with the entertainment. If a contract is required, the committee chairperson should secure the necessary paperwork and submit the proposed contract to the Board liaison for approval by the CLA Board. Board liaison signs the contract after Board approval. A copy of the finalized contract must be provided to the Board liaison. If special equipment is needed, this requirement should be addressed in the contract. If no contract is required, the contact person should make arrangements to secure whatever equipment may be required, i.e. lights or sound with the help of the Board liaison. We only supply what is available to us from the people in our community who have sound or lighting equipment. This includes any technical personnel. No additional equipment is to be purchased. If a deposit is required, contact the Board liaison to secure a check from the Board Treasurer. Arrangements should be made with the Board liaison to secure final payment, if needed, prior to the event.

## **Decorations**

If decorations are required for the event, the committee should determine if there are any decorations from prior years that could be used. Decorations are stored at the Castle. The Board liaison can assist the committee in securing access to the decorations.

At the conclusion of the event, the committee will need to take down and appropriately store the decorations.

## Publicity

Publicity includes:

- Preparation and sale of tickets if necessary
- Ads for the
  1. *Lite Lines*
  2. *Communiqué*
  3. CLA Website
  4. CLPOC Blast
  5. Canadian Lakes daily email
- Flyers for distribution throughout the community
- Printed programs, if needed
- Display on public signs throughout the community

A committee member should be designated to manage ticket sales if tickets are required for the event. Tickets can be printed through a commercial printing service or through individual member computer programs. It is the committee's responsibility to establish sale dates, times and sales people. Sales may also include the use of mail sales, if appropriate. Monies collected from sales should be given to the Board Treasurer for deposit after each sale. Tickets need to be numbered. A cross reference sheet showing the person purchasing the tickets, ticket numbers, telephone number and number of tickets purchased must be completed for all sales. Money needs to be balanced with sales cross reference sheet at the end of each sale day. Cross reference sheet and monies must be given to the Treasurer

All advertising should be developed with the assistance of the Board Communications Director who handles all publicity. The committee should consult with the Communications Director to make sure that deadlines for publication (no sooner than two months in advance of the actual event) for all advertising are met. Flyers advertising the event should be prepared by the Board Communications Director and placed at:

- Alpine Haus (2)
- Highland Haus (4)
- Canadian Lakes restaurant (1 + possible tents for tables)
- Royal pool and fitness center (2)
- Castle (2)
- CLPOC office (1)
- Golf pro shops (3)
- Campgrounds if appropriate (7, but seasonal)
- Placement at the corner shopping area can be placed at the discretion of the Board

### **Event Wrap-up**

#### **Clean-up**

When the event is finished, it is the committee's responsibility to assure that the facility is clean. All used paper products and other waste should be placed in trash bags, which should be available at all sites. This should be confirmed in advance. Filled bags should be closed and placed near the door of the facility for pick-up by maintenance.

All unused food must be stored (dry products and freezable items), thrown away or distributed to a local charity. No items, including food or condiment, may be left in the refrigerator. The kitchen area, including countertops, should be wiped down. If items such as coffee urns, steamers, etc. have been moved from one location to another, they should be properly cleaned and returned to their original location. If washcloths and towels are used, arrangements should be made for a committee member to wash and return the items to the appropriate location.

Decorations should be removed and stored at the Castle.

**Please leave the facility in an acceptable condition.**

When leaving the facility, all lights and ceiling fans should be turned off and doors locked. The Board liaison will have keys to lock the doors. A listing by location of all light and fan switches is provided at the end of this guide.

## **Final Steps**

The committee chairperson should prepare an event summary report. A report form has been developed for this purpose. It can be found in this guide or the chairperson may obtain a form from the Board liaison. The committee may find it helpful to conduct a final meeting to gather all of the required information. Prior to submitting the final report, all income and final bills should have been provided to the Board liaison. The report requires a final financial accounting.

The CLA relies on volunteers to assure that planned events are provided to the community. Therefore, it is important that we appropriately thank those who assist with an event. The committee should determine who should receive thank you notes and how those notes should be transmitted:

- Mailed paper notes
- Individual email “notes”
- Group thank you through email
- The CLA Website
- *Lite Lines*
- Communiqué

**The Canadian Lakes Association and  
especially the Canadian Lakes Association Board of Directors  
wish to thank you all for your hard work and dedication.**

**Your volunteerism makes a difference!**