



**U.S. Green Building Council
Central Texas – Balcones Chapter**

Title of Event

Date of Event

Event Template - 7/1/10 prepared by:
Jane Baxter Lynn
Executive Director
Elyse Pearson
Programs Intern

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CONTACTS:

CHAPTER COORDINATORS:

Name	E-Mail	Phone	Title	Responsibilities
Jane Baxter Lynn	jbaxterlynn@usgbc-centraltexas.org	(512) 470-9923	USGBC CT-B Executive Director	

ADVISORS/SERVICE PROVIDERS (caterer; AV equipment; location etc.):

Name	E-Mail	Phone	Title	Responsibilities

SPEAKER/S:

Name	E-Mail	Phone	Title	Responsibilities

EVENT DETAILS:

Event title:

Sub-head:

Date:

Time:

Speaker:

Location:

Purpose:

Welcome: *who is doing the welcome? Include Time*

Introducer of speaker: *Who is introducing the speaker? Include Time*

Keynote Speaker:

Overview:

Example: The next in the USGBC Central Texas – Balcones Chapter presents a lecture series featuring Helen Plume, climate change expert from New Zealand. The lecture will include 150-200 attendees from Central Texas who are interested in global climate change issues and how they relate to Central Texas. Attendees will have the opportunity to meet Helen Plume at a reception after the lecture.

Ticket Prices – Includes _____ & _____ (i.e. Reception, tour, drinks, dinner)

Chapter Member - \$\$\$\$

Non-Member - \$\$\$\$

Chapter Member (Early Bird) - \$\$\$\$ (end date)

Non-Member (Early Bird) - \$\$\$\$ (end date)

Students - \$\$\$

Dress: *example: Business Casual*

Parking: Include where, how much, and special instructions including the need for permits

Catered: Y/N *(by whom and type of catering)*

RSVP: Y/N *(Purchase tickets unless invited guest)*

Goals:

- *Cost covered by sponsorships*
- *Minimum/maximum # of attendees*
- *To highlight the chapter’s leadership role in promoting sustainable development in Central Texas*
- *To raise funds for chapter operations*

Program:

Time a.m.	XXX
Time a.m.	XXX
Time p.m.	XXX
Time p.m.	XXX

Audience:

Example: Approximately 150-200 attendees from across the broad spectrum of the green building and sustainable development movement including: architects, engineers, consultants, realtors, developers, product manufacturers, and representatives from educational institutions, related trade, industry and professional associations, chambers of commerce, public utilities and public officials and city management.

BUDGET:

INCOME				
Source	Specifics	Description	Amount	Total Revenue
Admission Fees	Member and non-member prices set	Anticipated # paying	\$	\$
Sponsorships				
			Cash total	\$
Sponsorships – In-kind				
	Location sponsor:			
	Food sponsor:			
	Water sponsor:			
	Alcohol sponsor: etc.			
	Media sponsor			
	Association partner			
Total		0	0	0

EXPENSES				
Item	Supplier	Description	Amount per item	Total Expenses
Venue				\$
Catering				\$
Audio-Visual				\$
Printed & copying				\$
Speaker Fee				\$
Speaker gift				\$
Miscellaneous expenses – name tag ribbons				\$
				\$

Total Revenue \$\$\$\$\$\$ (subject to ticket sales)
Total Expenses \$\$\$\$\$\$
Net Income \$\$\$\$\$\$

Notes:

EVENT PROGRAM:

The schedule will start between X and X p.m.:

Example Program:

(# mins)	Tour
(# mins)	Welcome
(# mins)	Registration
(# mins)	Networking
(# mins)	Conclusion
(Time)	Reception begins

COMMUNICATIONS TIMELINE:

Timeframe	Action
As soon as event is known	Load event information onto website calendar as a place holder through Wild Apricot
As soon as event is known	Contact Communications Committee for assistance with creating and submitting event information for dissemination to magazines, social media calendars, and industry event listings
As soon as event has made flier	Send event information to Board, Chairs, and Committees for them to send their personal networks
As soon as event has made flier	Create first email template in Wild Apricot
5-6 weeks out	First announcement is sent out to Chapter members
4 weeks out	Ensure the event is included in the Bi-weekly Event Roundup
3 weeks out	Send invitation to industry organizations (AGC, ABC, AIA, ASHRAE, RICA, ASME, ASCE) as appropriate
3 weeks out	Create calendar listing for newspapers and online media <i>(Obtain most current media list from Communication Committee or ED)</i>
3 weeks out	Follow up email and Call for Volunteers
2 weeks out	Bi-weekly round up (every 2 nd Monday)
10 days out	Reminder of Early Bird pricing due to end (3 days before full fees set in/ last week for Early Bird Pricing)
5 days out	"Don't miss" e-blast
2 days out	Final e-blast (if necessary and depending on nature of event)
1-2 days out	Volunteer Confirmation
1-2 days out	Final communication with speaker/s and chapter leadership
	Event

SPONSORS:

Based on the Budget, develop an event specific sponsorship packages sheet for use in pitching potential sponsors. Be sure to check with the Development Committee to ensure that the levels are consistent with other similar events and that the names of the packages do not conflict with the overall chapter sponsor packages such as Platinum, Gold, Silver etc.

AN EXAMPLE SHEET:

AVAILABLE SPONSORSHIP PACKAGES (tax deductible)

Event Sponsor – \$Amount (# needed)

- 10 tickets
- Table for display of marketing materials at the event
- Logo included in all marketing and communications relating to the event
- Logo included on sponsor recognition PowerPoint and all signage as an Event Sponsor
- Recognition in opening and closing remarks

Location Sponsor - \$Amount (# needed)

- 6 tickets
- Marketing materials on information table
- Inclusion in all marketing and communications relating to the event
- Logo included on sponsor recognition PowerPoint as Location Sponsor

Catering Sponsor - \$Amount (# needed)

- 4 tickets
- Marketing materials on information table
- Mention in all marketing and communications relating to the event
- Logo included on sponsor recognition PowerPoint and other signage as Catering Sponsor

Band Sponsor - \$Amount (# needed)

- 2 tickets
- Name of company included on sponsor recognition PowerPoint slide and signage at the event
- Opportunity to introduce the band

Supporting Sponsor - \$Amount (# needed)

- 1 ticket
- Name of company included on sponsor recognition PowerPoint slide and signage

Contact

To become a sponsor please contact the Chapter's Development team: Mike Krentz (512-963-4778 c), Jamie Blakeslee (210-837-9404) or Drew Sloat (512-673-2051).

SPONSORSHIP TRACKING:

Create a sponsorship tracking sheet in Excel for both confirmed and potential sponsors:

Sponsor	Level	Contact	Phone/email	# Comp tickets	Invoiced Y/N	Paid – check/ credit card	Thanked Y/N	Who responsible

SPONSORSHIP RECOGNITION:

Create a Sponsor recognition PowerPoint and Sponsor Signage Board to go on an easel/s near reception.

Example PowerPoint Slides:



Note: template power point slides are available from the ED

Example Signage Board

Special Thanks to our Sponsors:



SPEAKERS

Speaker Bio:

Speaker Preparation:

- Book and confirm travel information for Speaker
- Make sure the Speaker knows his/her audience – size, knowledge level, industry diversity
- Brief Speaker on program, necessary contacts, and information on other speakers prior to the event
- Develop enter and exit plans
- Make a special name tag
- If the Speaker is a public or state official be sure to research protocol for introducing that person and provide to introducer
- Find out: (if applicable)
 - What kind of food Speaker likes
 - Any allergies to foods
 - Vegetarian/vegan status
 - Wine preferences

Speaker Presentation:

- Obtain speaker presentation prior to event

Presentation notes:

- Make notes on the speaker presentation
- Send the speaker notes with comments and concerns at least 1 week prior to event

Speaker Gift:

Determine value and type of gift in liaison with Executive Committee, then purchase it. Could be a restaurant gift voucher, a book, a USGBC pin...

Notes for presenters/introducers:

At least the day before (preferably sooner) provide the speaker and chapter leadership attending, as well as whomever is doing the presentation and/or introductions with program notes, including final program with times, who is introducing whom, welcome notes if something specific you want someone to say, any special protocols to be followed and so on, Advice on what this should entail can be gained from the executive director.

LOCATION:

Physical Address: XXXXXXXX
XXXXXXXX

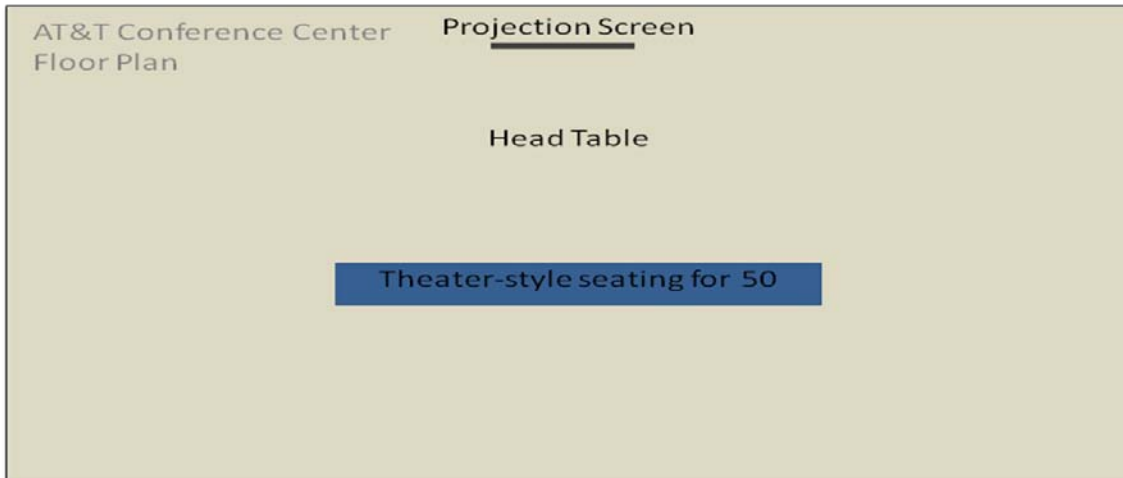
Map: Example



LOCATION FLOOR PLAN AND TABLE LAY OUT:

When organizing the venue, be sure about what layout you need and the number of attendees you anticipate. Some examples:

- Lecture: You'll probably want theater style seating
- Panel discussion: You'll also want theater style seating and you'll also need a podium, stage and table/s with chairs for the number of people on the panel
- Roundtable discussion: U- shaped table set up with chairs around the outside edge
- Etc.
- Example:



Information Table Registration Table

Buffet in corridor

CATERING:

Actions:

- Sign contract with caterer for desired food
- Determine number of food stations (i.e. cheese, main, dessert)
- Provide caterer with:
 - contact person information
 - address to the facility
 - space allocated for food set up
- Determine location appliances for catering needs
- Determine necessary items not provided by caterer
- Make final payment to caterer as outlined in the contract

ITEM LIST:

Item:	Quantity Needed:	Have?/Provider	Person(s) Responsible for bringing:
Linens			
Tables			
Forks			
Knives			
Spoons			
Napkins (cocktail)			
Plates			
Trash Cans			
Chafing dishes			
Cups/Glassware (wine and water)			
Ice	2.5 lbs per person = 350 lbs		
Bottle openers			
Wine openers			
ETC.			

Additional Notes:

EQUIPMENT:

Set Up Equipment Needs			
Small Easels			
Large Easels			
Chairs			
ETC.			
Band Equipment Needs			
Microphone			
Extension Cords			
ETC.			
Speaker Equipment Needs			
Projector			
Projection Screen			
Remote for Presentation			
Computer (internet access)			
ETC.			

NAME TAGS:

- Avery name badge labels can be bought at any office supply store
- Download template 8395 or 5395 from avery.com/templates free of charge
- A sample name tag sheet is in the Appendix section

SALES TAX EXEMPTION

- The U.S. Green Building Council Central Texas – Balcones Chapter is a tax exempt non-profit
- When buying materials for events make sure to fill out Sales Tax Exempt form in the Appendix section
- Occasionally a sponsor may ask you for a W9, if so contact the executive director.

SPECIAL GUESTS (invited):

- Send personalized emails to guest including any special instructions (i.e. their guest must pay) – encourage Board and Committee leadership to do the same
- Determine who is inviting whom
- Make pre-printed name tags

CHAPTER LEADERSHIP:	CONTACTS	ATTENDING Y/N
CHAIRS:	CONTACTS	ATTENDING Y/N
OFFICIALS:	CONTACTS	ATTENDING Y/N
ASSOCIATIONS:	CONTACTS	ATTENDING Y/N
MEDIA:	CONTACTS	ATTENDING Y/N

VOLUNTEERS:

Opportunities:

Duty	How many needed	Times required to be there (from-to)
General set up		
Band set up		
Registration		
Greeters		
Information table		
Food table attendants		
Bussers		
Alcohol Pourers (TABC certification needed)		
Pack-up		
Photographer		
Videographer		
Security		

Set up a Doodle link (www.doodle.com) to go out to volunteers inviting them to participate and indicate what they would like to do.

Volunteer Schedule

Name	Assigned Duty	Time	Contacts
Jane Baxter Lynn	Information Table	6:00-7:00	jbaxterlynn@usgbc-centraltexas.org (512) 470-9923

Confirm with Volunteers day before:

- Parking Pass (if applicable)
- Confirmation of Dress and Duties
- Cell phone number of organizer

ON THE DAY

ITEMS TO BRING ON THE DAY

Item	Person Responsible:
Banner	
Business card box for give away	
Camera - digital	
Camera - video	
Chapter Fact Sheets (printed double sided)	
Clip board/s	
Computer	
Digital Camera	
Door Prize	
Easels (how many?)	
Extension chords	
Event signs (directional)	
Floor plan	
Information table display holders	
Laptop for presentation	
Laptops for online payment and member sign up	
Memory stick with PowerPoint/Presentation	
Money box	
Name tags - blank	
Name tags – pre-printed	
Pens/Pencils/Markers	
Petty Cash	
Power cords for laptops	
Receipt book	
Recycling Bins (if necessary)	
Registration list (printed x 3)	
Remote for LCD presentation	
Scissors	
Sign-up sheets for registration	
Speaker Gift	
Sponsor signage	
Stapler and extra staples	
Tape	
Tickets (if needed for beverages or holding a raffle)	
Tour Signs	
USGBC chapter logo boards (how many?)	
Volunteer list	

ON THE DAY TIMELINE:

Time	Activity	Responsible	Done
9:00	E-Blast goes out		
	Confirmation Email with program and details goes out to participants		
3:00	Doors Open and Set Up Begins		
3:00	Event Coordinators Arrive at Event Location		
4:00	Volunteers arrive to help with set-up		
4:30	Coordinator to brief volunteers and give them materials		
5:00	Volunteers arrive to set up registration (5:00-7:00)		
5:30	Tour Begins		
6:00	Volunteer greeters welcome and direct guests (6:00-7:00)		
6:00	Guests arrive and sign in		
6:00	Information table set up		
6:00	Program Starts: Registration and Networking		
6:30	Speaker Arrives and is greeted by ____		
6:40	Welcome by ____		
6:55	Speaker Introduction by ____		
7:00	Lecture (7:00-8:00)		
7:05	Caterers Set up Food		
7:55	Q&A Session		
8:00	Reception Begins		
10:00	Guests leave		
10:00	Volunteers help clean up		
10:30	All Volunteers and Coordinators leave		
	All trash and recycled is handled		

AFTER THE EVENT:

EVENT FEEDBACK

Poll organizing committee and chapter leadership for feedback on what was good, what went wrong, what could be enhanced and note in plan for next time.

FOLLOW UP/THANK YOUs

- Send an informal thank you note as soon as possible after the event to speaker/s, sponsors, volunteers and location staff etc.
- Send a formal (by mail) thank you within 2 weeks following the event
- If thanking sponsors please copy the development department
- A sample thank you letter and sponsorship letter are in the Appendix section

APPENDIX:

SALES TAX EXEMPT FORM

THANK YOU LETTER EXAMPLES

NAME TAGS

EVENT SIGN UP SHEET



Central Texas–Balcones

P.O. Box 157
Austin, TX 78767-0157
www.usgbc-centraltexas.org
512-470-9923

BOARD OF DIRECTORS

James Andrews
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Overland Partners Architects

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Co-Vice Chair - Austin
Designated Tree

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Board Member
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Jane Baxter Lynn
Executive Director

SCRC REPRESENTATIVE
Kathy Zarsky
At Large Representative
Holos Collaborative

NATIONAL BOARD MEMBERS
Robert Harris
SCRC Representative
Lake/Flato Architects

Gail Vittori
Immediate Past
National Chair
CMPBS

Date

Ms./Mr. XXXX
Her/His Professional Title
Organization/ Business
Physical Address

Re: Event Title

Dear XXXX,

We just wanted to say thanks again to the **(Organization/Business)** for making possible the **(Event Title)**, on **(Event Date)**. Without **(Business/Organization)**'s marketing support and operations excellence, the event would not have been the success that it was. Please pass on our thanks to **(Alternate Contact)** particularly for helping make it happen.

When you feel you're ready, feel free to submit a 400-word highlight article for our website focused on **(Business/Organization)**'s green building efforts. We were delighted that so many people took advantage of **(Something they offered)**.

As an annual sponsor at the **(??)** level, **(Business/Organization)** will continue to have its logo on our home page and in the sponsor section of our website. We would also be happy to hold other educational events if and when you have availability.

Thank you for everything you and your team did for us.

Sincere regards,

Jane Baxter Lynn
Executive Director
USGBC Central Texas – Balcones Chapter

Cc: Alternate Contact if Applicable



Central Texas–Balcones

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City of San Antonio
- Dana Nichols**
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SAWS
- Eduardo Parra**
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Immediate Past
National Chair
CMPBS

Date

Ms/Mr. XXXX

Her/His Professional Title

Organization/Business

Address

Re: Marketing Support: Title of the Event

Dear XXXX,

As a 501(c)(3) non-profit, the USGBC Central Texas – Balcones Chapter relies on the support of organizations like yours to provide the programming necessary to advance our mission of accelerating the transformation of sustainable building and land development practices. Thank you for making possible the **(Title of the Event)**, on **(Date of the Event)**.

By becoming a **(Level of Sponsorship)** of the Chapter and providing the **(???)** for this event, the **(Organization/Business)** will have an opportunity to showcase the City’s leadership in the green building movement within our region.

Below is an outline of the benefits to which **(Organization/Business)** is entitled:
Some Examples:

- # Chapter memberships (valid for one year)
- Logo on Chapter website Home Page with link to your website for one year
- Logo on sponsor page of website with link
- 400-word highlight article on website
- Logo on all advance event marketing materials
- Signage at the event
- Opportunity to hand out promotional materials at all Chapter events
- # tickets to the event

Please let me know if you have any clarifying questions. I can be reached at jbaxterlynn@usgbc-centraltexas.org or 512-470-9923

Yours sincerely,

Jane Baxter Lynn
Executive Director
USGBC Central Texas – Balcones Chapter



Jane Baxter Lynn

Executive Director

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Chapter Volunteer

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Title

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Title

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Title

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Title

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Title

U.S. Green Building Council
Central Texas - Balcones Chapter



Name

Title

U.S. Green Building Council
Central Texas - Balcones Chapter

