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- ◆ Fundraising for the event, if applicable
- ◆ Finding the appropriate number of additional volunteers to execute on tasks for individual events
- ◆ Providing direction to staff volunteers
- ◆ Finding and booking venues
- ◆ Sourcing collateral, gifts, refreshments, etc., for individual events
- ◆ Creating event tickets, posters, and other collateral
- ◆ Organizing transport to and from the event
- ◆ Sending and responding to event-related emails (internal and external)
- ◆ Coordinating individual aspects of an event – for example, arranging food, décor, and entertainment
- ◆ Supervising and liaising with vendors at the event
- ◆ Conducting a post mortem after each event

## Time Commitments

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Being a member of the Social Committee requires time and effort. We take our social event planning seriously, and while some tasks may be small, many involve careful planning and attention to detail.

For this reason, committee members must be prepared to:

- ◆ Make a 1 year commitment to the Social Committee
- ◆ For each event planned, commit a minimum of 6 hours for the following activities:
  - Information gathering
  - Meetings
  - Sending and responding to emails
  - Phone calls
  - Event planning and coordinating

## Decision Making

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While it's impossible to please all people all the time, our aim is to organize events that will appeal to a significant number of staff.

In some cases, it may be possible to ask staff to vote for their preferred option— the Holiday Party, for example. In other cases, the Social Committee must make the decision according to the general consensus of the committee members.

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Event/ Month	Description	Who's Invited	Employee & Guests Costs
<b>Year End Holiday Party</b> December	<ul style="list-style-type: none"> <li>◆ Semi-formal event. Cocktails, dinner, awards, &amp; dancing</li> <li>◆ Alcohol available</li> <li>◆ Must plan for safe transportation</li> </ul>	<ul style="list-style-type: none"> <li>◆ All staff, including volunteers, co-ops, current contractors, Board of Directors</li> <li>◆ Significant others</li> </ul>	<ul style="list-style-type: none"> <li>◆ Free</li> </ul>
<b>Family Picnic</b> June thru September	<ul style="list-style-type: none"> <li>◆ Games, music, entertainment, family activities, lunch</li> <li>◆ No alcohol</li> </ul>	<ul style="list-style-type: none"> <li>◆ Employees</li> <li>◆ Significant others</li> <li>◆ Children</li> </ul>	<ul style="list-style-type: none"> <li>◆ Company-subsidized</li> <li>◆ Discounted tickets sold per child and adult</li> </ul>
<b>Discretionary Event 1</b> TBA	<ul style="list-style-type: none"> <li>◆ TBA - as per feedback acquired from staff online survey</li> <li>◆ Budget-dependent</li> </ul>	<ul style="list-style-type: none"> <li>◆ Staff members</li> <li>◆ TBA</li> </ul>	<ul style="list-style-type: none"> <li>◆ Company-subsidized</li> <li>◆ Employee costs dependent upon event cost</li> </ul>
<b>Discretionary Event 2</b> TBA	<ul style="list-style-type: none"> <li>◆ TBA - as per feedback acquired from staff online survey</li> <li>◆ Budget-dependent</li> </ul>	<ul style="list-style-type: none"> <li>◆ Staff members</li> <li>◆ TBA</li> </ul>	<ul style="list-style-type: none"> <li>◆ Company-subsidized</li> <li>◆ Employee costs dependent upon event cost</li> </ul>

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# Social Committee Annual Planning

## Annual Activities

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The following steps outline the activities that occur each year to create an Annual Social Events Plan.

1. Toward end of December, HR emails all staff to ask for a minimum and maximum number of employees (as per **Members** section of this document) to volunteer to join the Social Committee. The **Social Events & Social Committee – Terms of Reference** are copied into the email so that staff members understand their obligations when joining the Committee.
2. If insufficient volunteers sign up by the deadline, HR asks the **CUSTOMIZER: Insert senior manager, example CEO** to ask for volunteers.
3. HR meets with Finance to understand anticipated budget.
4. The Social Committee is formed by the first week in January of the reference year.
5. By end of January, the Social Committee:
  - a. Creates a first draft Annual Social Events Plan by completing the **Working Copy – Detailed Social Events Plan for Year**, found in the **Forms** section of this document.
  - b. Meets to determine options for discretionary events and possible venues for re-occurring events.
  - c. Investigates availability and pricing of options.
  - d. Creates a final list of options.
  - e. Sends all staff an online survey to confirm current demographics (since this information may differ from the information we have on record for each employee), and to allow staff to communicate their preferences for discretionary events and venues for recurring events.
  - f. Analyzes survey input to determine final annual events.
6. By February 15, the Social Committee:
  - a. Creates the final Annual Social Events Plan, by completing the **Final Social Events Plan for Year** table found in the **Forms** section of this document.
  - b. Presents the proposed final plan and budget to **CUSTOMIZER: Insert approval required. EXAMPLE: Senior Management Team**, with a request for approval by the end of the month at the latest. If the first plan is not approved, make adjustments accordingly based on feedback received.
7. After the final plan has been approved, a Team Lead is assigned to each event.
8. The Events schedule for the year is communicated to staff.

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## Forms

### Working Copy – Detailed Social Events Plan for <Insert Year>

The following table provides a structure for documenting options for social events to be held during the year. The final options will be sent to all staff via online survey, and their responses will guide decisions. Once event details are established, the final **Social Events Plan** will be created.

Event	Options	Details, Dates, Availability, Comments	Costs
December Holiday Party	Venue Option 1 and date		\$ .00
	Venue Option 2 and date		\$ .00
	Venue Option 3 and date		\$ .00
Picnic	Venue Option 1 and date		\$ .00
	Venue Option 2 and date		\$ .00
	Venue Option 3 and date		\$ .00
Discretionary Event 1	Option 1		\$ .00
	Option 2		\$ .00
	Option 3		\$ .00
Discretionary Event 2	Option 1		\$ .00
	Option 2		\$ .00
	Option 3		\$ .00
December Holiday Party	Option 1		\$ .00
	Option 2		\$ .00
	Option 3		\$ .00

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### Final Social Events Plan for <Insert Year>

Present the following completed plan to CUSTOMIZER: Insert approval required. EXAMPLE: Senior Management Team for approval on or before February 28.

#### SOCIAL COMMITTEE MEMBERS

<b>Insert Year Social Committee Members</b>	HR – Social Committee Chair: <b>Insert Name</b>	
	<ul style="list-style-type: none"> <li>◆ <b>Insert Name &amp; Department</b></li> <li>◆ <b>Insert Name &amp; Department</b></li> <li>◆ <b>Insert Name &amp; Department</b></li> </ul>	<ul style="list-style-type: none"> <li>◆ <b>Insert Name &amp; Department</b></li> <li>◆ <b>Insert Name &amp; Department</b></li> <li>◆ <b>Insert Name &amp; Department</b></li> </ul>

#### BUDGET

<b>Anticipated fundraising funds</b>	\$ <input type="text"/> .00
<b>Company-paid contribution</b>	\$ <input type="text"/> .00
<b>Proposed social activities \$ required</b>	\$ <input type="text"/> .00
<b>Difference</b>	\$ <input type="text"/> .00
<b>How difference will be funded</b>	<input type="text"/>

#### FINAL INSERT YEAR EVENT DETAILS

Event	Venue, Date & Description	Cost	Cost \$ offset	Total Company Cost
<b>December Holiday Party</b>	<b>Venue and date</b> Description	\$ <input type="text"/> .00	none	\$ <input type="text"/> .00
<b>Picnic</b>	<b>Venue and date</b> Description	\$ <input type="text"/> .00	\$ <input type="text"/> .00 Example: Ticket sales, Fundraising	\$ <input type="text"/> .00
<b>Discretionary Event 1</b>	<b>Venue and date</b> Description	\$ <input type="text"/> .00	\$ <input type="text"/> .00 Example: Ticket sales, Fundraising	\$ <input type="text"/> .00

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### Individual Event Planner Form

Complete this form for each event being planned.

#### EVENT DETAILS

<b>Event Name</b>			
<b>Event Date</b>			
<b>Event Description</b>			
<b>Team Lead</b>			
<b>Event Team Members</b>	<ul style="list-style-type: none"> <li>◆ <input type="text" value="Insert Name &amp; Department"/></li> <li>◆ <input type="text" value="Insert Name &amp; Department"/></li> </ul>	<ul style="list-style-type: none"> <li>◆ <input type="text" value="Insert Name &amp; Department"/></li> <li>◆ <input type="text" value="Insert Name &amp; Department"/></li> </ul>	

#### MANAGING VENDORS

List vendors and information related to the event.

Vendor	Service Provided	Main Contact	Contact Info
<input type="text" value="Insert Vendor Name"/>	<input type="text" value="Service(s) provided"/>	<input type="text" value="Name"/>	<ul style="list-style-type: none"> <li>◆ <input type="text" value="phone"/></li> <li>◆ <input type="text" value="email"/></li> </ul>
<input type="text" value="Insert Vendor Name"/>	<input type="text" value="Service(s) provided"/>	<input type="text" value="Name"/>	<ul style="list-style-type: none"> <li>◆ <input type="text" value="phone"/></li> <li>◆ <input type="text" value="email"/></li> </ul>
<input type="text" value="Insert Vendor Name"/>	<input type="text" value="Service(s) provided"/>	<input type="text" value="Name"/>	<ul style="list-style-type: none"> <li>◆ <input type="text" value="phone"/></li> <li>◆ <input type="text" value="email"/></li> </ul>

#### ACTION CHECKLIST

Insert and assign action items. Add rows as needed.

Action	Assigned to	Deadline	Done
<input type="text" value="Insert action"/>	<input type="text" value="Name"/>	<input type="text" value="DD-MM-YYY"/>	<input type="checkbox"/>
<input type="text" value="Insert action"/>	<input type="text" value="Name"/>	<input type="text" value="DD-MM-YYY"/>	<input type="checkbox"/>
<input type="text" value="Insert action"/>	<input type="text" value="Name"/>	<input type="text" value="DD-MM-YYY"/>	<input type="checkbox"/>