



## WERCouncil Event & Tour Planning Guide

The primary mission for WERCouncils is to provide the same quality programming found at the annual conference and to enhance the personal and professional development of individuals within the industry. WERCouncil events may include education events, facility tours, hosted webinars, and networking mixers.

The newly elected volunteers should meet to map out plans for the upcoming year after Chair selections have been made, but before the meeting season has begun. The following list covers some of the challenges that volunteers may face while planning meetings.

### Planning Education or Tour

The WERCouncil planning horizon should be a minimum of six months. And the vice chair is encouraged to plan a program schedule for the entire year, rather than month-by-month. Volunteers have found that this is both easier and more effective for meeting promotion and execution. A typical schedule would have all volunteers meeting for a brainstorming/planning season during the early months of the fiscal year (July 1 through June 30).

When planning for the upcoming year, consider establishing a backup program to replace a last minute cancellation. This program can make use of WERCouncil volunteers, local WERC members, or any other individual in the local area who would be prepared to speak on short notice.

All meeting and tours need to be confirmed with the National Office. Please see the [WERCouncil Educational Event Guidelines](#) for all policies concerning events. **Forms that need to be completed at least 30 days prior to an event include:**

- [Event Announcement Form](#)
- [Proposed Facility Tour Site Form](#)

### Type of Meeting

1. The most common format for a meeting is the lecture, featuring speakers, panelists or discussion leaders.
2. Some councils have held all-day or half-day seminars with several speakers.
3. Facility tours are traditionally a very big draw for WERCouncils. New councils especially, may consider organizing a tour for their first event. A facility tour can be a positive way to introduce a new council into an area and gain local interest and support.

The National Office has a [sample e-mail survey](#) that WERCouncil can adapt to determine the interests and needs of their areas.

### Day & Time of Day

Tuesdays, Wednesdays, and Thursdays are the most popular days to hold meetings and generally fare much better than Mondays or Fridays. Once a day of week has been selected, it is good practice to continue to hold meetings on that day to set a pattern for attendees.

Selecting the right time of day can be the most challenging factor to determine. WERCouncils have held evening meetings sometimes followed by dinner, afternoon meetings that may include lunch, and morning meetings that may include breakfast. What is successful for one WERCouncil may not be for another. WERCouncils will have to experiment with selecting a time of day that works best for their potential attendees. WERCouncils may also consider using the e-mail survey and include questions about the days and times that work best for prospective attendees.

# WERCouncil

## Location

The location should have an atmosphere conducive to learning and should be near the majority of members. Meeting sites should be reasonably priced and can include such places as hotels with meeting facilities, banquet halls and restaurants with accommodations for larger parties.

Tours should have some general meeting space where networking before or after the tour can take place.

## Determining Budget & Attendee Registration Fees

WERCouncils can calculate their fees on a cost plus basis. This budget should be prepared at the beginning of the yearly planning cycle. [Click here to view a budget template](#). This template will assist you in determining your fees for the coming year:

Things to consider in your budget:

- Rental fees (audiovisual, room, etc.)
- Food and beverage
- Speaker fees
- Transportation
- Marketing
- Supplies

The National Office's support of WERCouncils is made possible with the dues paid by members, programs and sponsors. When determining meeting fees, the WERCouncil may consider charging non-WERC members a higher fee (an additional \$15 to \$20). WERCouncils can verify WERC membership status by accessing the online membership directory or checking with the WERC office.

## Speaker Fees

All expenses for speakers are the responsibility of the local WERCouncil. Co-sponsoring a meeting with another association in the area can help lower the cost of a particularly expensive program or speaker.

## **Event Announcement and Promotion**

View the [WERCouncil Educational Event Guidelines](#) for policies and procedures for event announcements and promotion. Click here for the [Event Announcement Form](#). This form must be received no later than 30 days prior to the event.

## Invitations

- ✓ E-mail invitation/meeting announcements a minimum of 30 days in advance.
- ✓ Provide complimentary invitation to tour guide for an upcoming meeting.
- ✓ Provide complimentary invitation for up to two students (Student Participation).

## Tour/Meeting Waiver and Release

Each person intending to participate in the tour, including volunteers should complete and submit a waiver and release form before they can take the tour. The need for this waiver should be indicated in the meeting/tour announcement. [Sample waiver language and release form](#).



## Planning a Tour

Once a tour has been confirmed, please fill out the **Proposed Facility Tour Site Form** and send no later than 30 days out from the event to the National Office. Send to [jleon@werc.org](mailto:jleon@werc.org).

You may plan a tour by itself or in combination with a meal and/or speaker. Here are some tips for planning a tour.

- ✓ Allow a minimum of 3 months for the planning.
- ✓ Identify possible facilities through networking.
- ✓ Preview the facility before setting up a tour.
- ✓ Address with the facility representatives any concerns regarding confidentiality of procedures and practices.
- ✓ Coordinate plans with the tour host.
- ✓ Finalize the tour date and time.
- ✓ Discuss any safety procedures or precautions that may need to be followed during the tour.
- ✓ Check parking accommodations.
- ✓ Review any security issues the tour site may have.
- ✓ Confirm 2 – 3 business days prior, meal reservations, number of attendees, and transportation