TEAM RUBICON STANDARD OPERATING GUIDELINE

Event Management Process	Region IX
Effective Date: 01JAN16	
Revised:	

Purpose:

Standardize the Region IX Event Management Process

Scope:

Applicable to all training and engagement events and should guide the submission and approval process for Event Proposals from all Region IX members

Guideline:

Regional Engagement Managers (REM) will manage the facilitation of Event Proposal submissions with the Regional Team. Once approved by the Regional Administrator (RA), the RA is responsible for transferring all events to the National Event Proposal Tracker. All events must align with Region IX and Team Rubicon's disaster relief mission.

Procedure:

1. Submit a Region IX Event Proposal Form Region IX Event Proposal Form

Event Proposal Form parts:

   a. **Page 1:**
       i.   **Select Your Region:** Region IX
       ii. **Select Type of Event:** Enter the type of event
   b. **Page 2:**
       i.   **Type of Training:** If it's not Training, put N/A
       ii. **Who are the Instructors:** If it's not Training, put N/A
   c. **Page 3:**
       i.   **Event Name:** The title of your event, this is how you should reference it in the AAR and on Roll Call
       ii. **Event Location:** Enter the address (including city, state, and zip). Include the business name if available. Include all locations if there is more than one.
       iii. **Event Start and End:** Enter the dates and times of the event.
       iv. **Event Objectives:** Briefly describe why you are planning to conduct the event. This is your justification statement (what you hope to gain from the event).

v. **Who's Going:** Enter the names of attendees (Include position titles if they are leadership). If you are unsure who will be attending, just estimate the number of participants

vi. **Execution:** Describe your plan for conducting the event. Include an agenda and/or timeline if applicable

vii. **Safety Considerations:** Please indicate any serious safety concerns identified and/or whether a SmartWaiver is required. SmartWaivers are required for all overnight events, fitness events, and any event that has the potential to cause harm to someone in attendance in any way

viii. **This is a No-Cost Event:** Yes or No

d. **Page 4:** Event Funding Request Guidelines

i. **Transportation:** Cheapest route flights are always the preferred booking method. If a billeted leader is attending, they may be authorized to receive mileage reimbursement equal to $.575 per mile from their home of record. This is also where you would identify whether rental vehicles will be needed

ii. **Meal Cost:** Put the total number of expected attendees in this area multiplied by the meal rate in the chart at the top of the form. They want to see your math work here!

iii. **Camping/Lodging Cost:** Put the number of camping sites/hotel rooms needed. For hotels add 25% to the cost to account for taxes

iv. **Field Consumables:** What do you need for this event?

1. **Marketing Materials:** If your State already has the materials in your inventory, put down what you will use, but annotate the funding requested will be $0. If your State does not have the materials you need, put down what you are requesting and how much it costs. For Funding Sources for those items, put in Other "State Budget". If you have questions about ordering Marketing Materials, ask your State Logs, or Regional Logs in their absence. If you are not requesting funding, just enter $0 for all Funding Questions

v. **Total Funding Requested:** The sum of the requests made above.

vi. **Did you remember to include staff or instructor travel into your funding request?** : Yes or No or Not Required

vii. **Funding Sources:**

1. **PEX Funding:** If there will be a Region IX Leader[s] with a PEX card attending the event, and you want their PEX card to be loaded, please indicate their name, and the amount needed in this section.

2. **Expensify Funding:** If this event requires reimbursement of volunteers who do not possess a PEX card, please indicate the names of the volunteers recommended for reimbursement and the estimated amount of reimbursement.

3. **Direct Billing:** If the event requires a payment to be made up front to an organization or business for use of a meeting space or similar, please indicate the cost in this section.
4. **Other:** Self-explanatory

   e. **Page 5:** Final Details

      i. **Coordination:** Select "I am going to forward this Event Proposal to my Regional Team for review after submission" and "Not Complete. Awaiting Regional Administrator/Team Approval)"
      ii. **Anything else we should know?** List any notes or comments to the Regional Team or National Office that you feel is necessary here.
      iii. Make sure you mark the checkbox to have a copy of the proposal emailed to you.
      iv. Once you have received the Event Proposal, forward it to your State Engagement Coordinator, or the REM, if your State does not have anyone billeted.

2. **Regional Manager Event Approval Process**

   a. Once you click submit, this form will automatically populate a Google Spreadsheet, but will **NOT** automatically email the Regional Team. You must forward your request to your State Engagement Coordinator (If billeted) or the Regional Engagement Manager (REM). Some State Administrators prefer to see the Event Proposals prior to them being sent to the Regional level, so always check with them first.

   b. Once the REM receives the event request, he/she will then forward it to the Regional team for approval. The Regional Managers will each review and approve the Event Proposal according to the following guidance:

      i. **Regional Field Operations Manager:** Does the proposal fit in to the Region's Tactical Objectives? Are there any safety concerns? TRaining goals? Are all HQ TRaining requirements for approval met?
      ii. **Regional Planning Manager:** Does the proposal fit in to the Region's Strategic Response Plans and improve regional response capabilities?
      iii. **Regional Engagement Manager:** Does the proposal meet with the goals/objectives outlined in the Regional Readiness Plan? (Recruitment/Engagement priorities, outline for projected event types (i.e. have we conducted 12 Meet and Greets this quarter but no Training Events, etc). Is the proposal filled out completely and with enough detail? Once you have received approval by the Regional Team, you must inform the RA so they can update the Regional and National Event Trackers.
      iv. **Regional Membership Manager:** Do they need assistance with volunteer notification? Are there any skillset requirements?
      v. **Regional Finance Manager:** Does the proposal fit within the State/Regional Budget? Is there an expense that was missed (gas for rental, mileage, taxi, airport parking, meals, etc)?

    vi. **Regional Communications Manager:** Does the proposal have any communications requirements (Twitter/Facebook/photographer), if so, can we support? Do they have a photographer? If so, have they completed the Cameraperson Release Waiver?

    vii. **Regional Technology Manager:** Do they need technology support (Roll Call event creation, Everbridge message, etc)?

    viii. **Regional Logistics Manager:** Are there any equipment or materials requested? Do they need assistance with an order from Home Depot (on corporate account) or Enterprise Car Rental? Will they need an ICS Form 213?

    ix. **Regional Training Officer:** Is this a training event? Does this align with Region IX's training goals? Are all National TRaining requirements for approval met?

    x. **All Regional Managers:** Once you have reviewed the Event Proposal you need to *reply all* to the Regional Leader Distro with whether or not you approve the Event Proposal. If the proposal is denied, the REM will inform the requestor their proposal was denied and the reasons for denial.

3. **Final Approval**

    a. Once all Regional Managers have given their approval for the Event Proposal, the REM will pass the Event Proposal up to the RA for approval and submission to the National Tracker.

    b. RA's can approve all events up to & including $500. All events from $501 to $3000 require Divisional approval, with the rest requiring COO approval.

    c. Once final approval has been granted, the RA will notify the Regional Team.

    d. The REM will then notify the event creator or State Engagement Coordinator.

    e. The event creator will then create the Roll Call session IAW the guidelines for event creation and coordinate and execute the event. (State and Regional Engagement Managers can, and should, assist with Roll Call event creation as necessary)

    f. The REM verifies Roll Call event session creation and checks it for errors. If errors are found, the event creator is notified, and the necessary changes made before any marketing for the event can occur.

    g. If changes need to be made to the Event Proposal at any time, the REM and RA must be notified.

4. **After Action Report and Expense Reports**

    a. After the event, the original requestor must complete an Event After Action Form:https://docs.google.com/a/teamrubiconusa.org/forms/d/1Wbr_mN-PapCIpL-7RHwo1kuc0HsQAQj9DAn4iPCPGnk/viewform

    b. AAR's are mandatory on all events!

    c. If Regional Funding was used for the event, the original requestor must also coordinate with the Regional Finance Manager for PEX or expense reports.