

## **Planning and Executing Water Trail Events**

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Following is a collection of four helpful articles about planning and executing WT events, which ran as a series in the Iowa Water Trails Association Newsletter from November 2012 through February 2013:

- *Planning with Purpose for Successful WT Events*
- *Building a Checklist for Your WT Event.*
- *Writing a News Release for Your WT Event.*
- *It Ain't Over When It's Over--Extending the Value of Your WT Event.*

## **PLANNING WITH PURPOSE FOR SUCCESSFUL WT EVENTS**

A successful event can accomplish a lot more than entertaining and educating participants. Employing common-sense planning in the early phases can increase attendance, engage more volunteers, reduce panic and burnout for organizers, and project a professional image. It will generate valuable lead time to get your message in monthly newsletters and weekly newspapers. It will improve the odds of success for your future events, enhance your ability to recruit more volunteers, build coalitions with other individuals and groups for future support and publicity, and raise awareness among even those who do not participate.

The easier part is asking your leadership core some common-sense questions. The more difficult part is committing your time and focus to really document and implement the answers.

**Why do we need a WT Event?** Increase public awareness? Raise visibility of our efforts and our WT? Build support for development or funding? Grow the base of committed supporters? Engage local subject matter experts (SMEs). Recognize volunteers? Celebrate an accomplishment? Provide recreation opportunity? Provide education opportunity re history, art, or sciences? Engage youth in outdoor activities? Clean up the WT or a specific access? Construct or improve an access?

**What will be the topic and focus of the WT Event?** Why will people be motivated to attend or participate? What will the participant receive for his/her time investment? Can we state the "value proposition" in a single sentence? "This event will (insert action verbs) . . ." "As a participant, you will (insert action verbs) . . ." Who will be the presenters, facilitators, guides for this topic?

**When should we schedule this WT Event?** Is it related to a particular season of the year? Is it weather-dependent? Weekday, weekend, daytime, or evening? Should it coincide with a holiday, national observance, anniversary date, or other community events? Are we avoiding events which would compete for our audience? Have we consulted with planners or planning calendars at area County Conservation Boards and other similar groups?

**Where should we hold this WT Event?** Is this event best held indoors or outdoors? Does it require electricity, audio-visual support, light control, or kitchen facilities? Do we need an indoor backup for an outdoor event? Is there a budget for site rental?

Is the facility available for desired times of the day or days of the week?

**Who will be responsible for this WT Event?** Are we the lead organizer, a co-sponsor, or one of the participants in a community-wide event? Who in our organization is best-suited to provide overall leadership? Who will be best to lead parts of the effort?

**How will we publicize and promote this WT Event?** Do we have a solid outline of What/When/Where, short event description, long event description? Do we have a news release and a media contact list? Do we have photos to support the event (previous similar activities, locations, presenters). Do we have email address lists for likely participants? Will other groups include our event on their websites or in their

newsletters? Are there local event calendar websites for our area? Are we connected with local media people? Can we prepare and utilize posters? Does our event have any budget for advertising?

**What are the financial realities of this WT Event?** Will we need significant underwriting? A funding co-sponsor? Small donations? In-kind donations? Can we offer donors 501 (c) 3 certification for their tax reporting through our group or a co-sponsor? What would be our expense if the event is canceled? Will we charge a fee for the event?

**Are we prepared for possible contingencies during this WT Event?** What are our options if the event is threatened by weather or water levels? What if presenters must cancel or become ill? What if our planned facility loses heat, water, or electricity? What if only a small number of people register?

While many of these questions may seem to magnify the complexity and risk of an event, increasing “up-front” planning can reduce surprises, increase volunteer leader confidence, and maximize the value and enjoyment of your WT Event for all concerned. It has been said that, “Nothing succeeds like success.” Making your next WT Event a success will pave the way for even more successful events in the future.

## **BUILDING A WT EVENT CHECK LIST**

Checklists originated with airplane pilots, who started with a control stick and on/off switch, but were soon faced with an array of instruments, engine controls, engine indicators, control surface indicators, and communication devices. The benefits of all those devices also brought complexity, and a single oversight could impact one’s ability to take off and land safely.

### **Start With a Rough Outline**

While each WT event will somehow be unique, we can start with a basic outline within which we insert those unique elements. The basic questions of who, what, where, when are very helpful touch-points. We must also be mindful of timeline—commitments for speakers or venue may need a lot of lead time, while choosing the cookie flavors will not.

### **Pre-Planning (the step we love to skip)**

Purpose, objectives

Target audience, ages

Presentations, activities, messages

Liability, insurance, public cosponsors

Cost guidelines, expenses participant fees, donations, financial sponsors

Dates, suitable for target audience, potential conflicts with other events, holidays

Location, indoor/outdoor, heat/light/electricity, rest rooms, kitchen, drinking water

### **Event Content (what are we going to do, why are they coming)**

Topic or theme

Presenters, agreements, contracts, biographies, introductions, transportation, hospitality

Required equipment, presentations, demonstrations, boats, safety

### **Facilities (appropriate for event, presenters, & attendees)**

Access by onsite person, volunteer, issued key

Number of participants

Electricity, plumbing, heat, light control for projector

Rest rooms

Space for activities

Parking, accessibility, possible shuttles

Chairs, tables, appropriate arrangement

Directions for publicity, signs near event

Cleanup, tools, supplies, trash disposal

Equipment (managing the technical risks)

Lectern, podium, projection screen

PA system, microphones, cords

Computer, projector, screen, extension cords, replacement bulb

Access to internet

Knowledgeable person, volunteer or paid, for all technology

Flip charts, markers, stands, non-mar tape, sticky notes, paper, pencils

Handouts, Printed Materials, Activity Materials, Samples (stuff to use or take home)

Agenda, speaker biographies, websites, email addresses

Sponsoring group info, website, email address

Info packets, name tags

Materials for activities, individual or shared

Sample items to hand out or pass around

Displays or exhibits

Food (from snacks to full meals)

Items and preparation required

Coffee pots need lead time

Pop containers need recycling

Box lunches, picnic lunches, grilled food, catered meal

Cleanup, sink, mops, trash bags, recyclables

Registrations (what do we do if they really want to attend?)

Register in advance, at event, both, limited space, limited materials

If a fee-paid event, payment due when, how, refunds

Registration info needed, name, email, phone, address

Cross-promotion, sign up for newsletters, bulletins, volunteer groups

Meal choices, boat rentals, shuttles, special needs

Registration table at event, forms, computer

Host name tags

Publicity & Promotion (getting your message out)

Event description, motivating, action words, benefits to participants

News release, critical information first, contact person, photo

Direct contact lists, mail, email, newsletter

Indirect contact, cosponsors' lists, other groups' newsletters

Media, newspapers, radio, TV, Cable TV shows or bulletin boards

Posters, bulletin boards, store windows

Photos available before requested

Organizers available and willing to do interviews, phone numbers

Photographer at event

Miscellaneous (the never-ending list of worries)

Safety, security, first aid, CPR, police & ambulance contacts

Severe weather procedures

Press access, reporters, TV cameras

Age appropriate guidelines

Pets

Contingency Plans (what could possibly go wrong?)

Relocating event, fire, loss of utilities, communication to presenters & participants

Canceling an event, who decides, cutoff date, reschedule, communication

Minimum # participants

Too many participants  
Weather, heat, cold, windy, dry, ice, water levels  
Presenters, illness, conflicts, family emergency  
Technical equipment, computer, projector, PA, microphone  
Food & delivery, early, late, totally forgotten

### **Customize the Checklist to your WT Event**

Copy the above items into a spreadsheet, imagine your event, delete unrelated items, add items as they come to mind, repeat. Add columns for due dates and responsible person. Review the list with your key organizers, revise items, then assign dates and responsibility. It's a good idea to have one master list maintained by one or two people, so one identical (and continually updated) list can be regularly shared with everyone.

This is a good start, and will give you an excellent chance at maximum success with minimal stress. Individuals responsible for a portion of the event, such as Food or Equipment, may need to expand their checklists to add more detail, identify sources, phone numbers, specific due dates to confirm quantities, etc. This would be an excellent resource in case that individual has his or her own emergency, and someone else has to step in.

Time and timing are often our biggest enemies when organizing an event. Our preferred presenter has already agreed to another event. Our preferred location has already been booked. Key volunteers have made commitments to other activities or family plans. Other groups have scheduled competing events on our preferred date. Monthly newsletters have already been published before they receive our event information.

Conversely, we have to be careful about assuming that our early planning prevents all problems. Regular followup contact with presenters, facility managers, food providers, and key volunteers will help avoid the problems of double-booking, lost calendars, forgotten commitment details, and glossed-over promises. Regular reviews of the entire checklist, along with selecting key items for one-month-prior, one-week-prior, and day-of checklists can be very helpful.

Organizing and executing a WT Event may not be quite on the level of piloting a jet airliner. But, building and using an event checklist can certainly help us get our project off the ground, help us enjoy the ride, and help us arrive at our destination of an enjoyable and successful WT Event for both participants and organizers.

## **CREATING A NEWS RELEASE FOR YOUR WT EVENT**

Now that you have completed planning for your next successful WT event, and built a checklist for executing that event, you need to attract participants to your event. In addition to your in-house newsletter and email list, and whatever paid advertising you can afford, you will want to utilize the power and reach of any available media (newspapers, radio, television, newsletters, blogs, public calendars, etc.) through the process of public relations.

While many of you, our valued subscribers, have experience and expertise in the natural sciences, environmental issues, natural resource conservation, or youth education, you may find the idea of writing a news release somewhat daunting, and your budget does not include a public relations staff member. Take a deep breath and relax. Save the complex sentences, obscure words and lyrical prose for your memoirs. A news release is a very simple, direct form of communication, where short sentences and short paragraphs are deeply appreciated. Follow a few simple guidelines for form and format, and you can become a good friend of your local media.

**Remember: You want to share your event information and recruit participants; the local media wants your event information to inform and entertain their audiences. A good news release can help accomplish both goals, one of those rare "win-win" situations.**

### **Concept of News and News Releases**

Whether something is news is in the eyes of the beholder, and in this case, those eyes belong to the reporters and editors. Most WT events will be considered news-worthy, at some level, because they involve people doing something which is somewhat unusual, and are not strictly a commercial activity. Depending on the scale of the event and the scale of the media, your news release may become a simple calendar item, or hopefully a "news story" written by a reporter. Your news release also has the potential to prompt an in-depth "feature story" about the event, the topic, or a key person. A feature story is more likely if the reporter has enough lead time, and if you are prepared to assist with additional resource information and referrals.

### **Advance Work**

At a minimum, you will need an accurate list of email addresses for local newspapers, radio stations, and TV stations, but it may also be appropriate to distribute your news release to area schools, government agencies, nonprofit organizations, etc. These addresses are usually listed on the "Contact Us" page of the business' or organization's website, but you may also have to make a few phone calls. In the rare case where one of your media outlets still performs copy/paste with adhesive, simply print out your news release, then deliver it via postal mail or hand-carry.

Building rapport with specific reporters or editors can be beneficial, but be aware that media folks frequently change positions, and their email addresses may become dead ends.

For some larger events, one or more media institutions may become a co-sponsor. Enter such an arrangement with a clear understanding of the benefits of more free publicity as well as any constraints on utilizing other media.

Determine the longest amount of lead time any of the media may need, but be sure to share the news release with all media representatives at the same time. Each type of media may run the story at a different time, but you will not be accused of playing favorites.

Before you prepare the news release, ensure that you have consent and commitment from anyone who will be cited as a presenter, discussion leader, subject matter expert, or contact person.

### **Writing the News Release**

The format of a news release will generally include the following elements, each separated by a blank line:

Organization Identification. Include the name of the organization, address, website link, phone number (the organization letterhead and/or logo, if available, often provides this with a professional appearance).

Header Section, with lines for "NEWS RELEASE," "FOR IMMEDIATE RELEASE" (all caps); and contact person, phone number(s), and email address.

News Release Title, or Headline, (capitalize first letter of each word, can be bold and slightly larger type size than balance of news release). "Marketeers" are always searching for the perfect "pithy" title--short enough to be read, but interesting enough to grab your attention. The title may be easier to write after you have completed your news release, and is often created from key action words in the body of the release. Add another line with a secondary title only if appropriate.

Dateline, example: Dateline Marion, IA (Jan. 2, 2013) -

News Release Body, (beginning on the same line as, and immediately following, the Dateline). The body should be written in the third person and "inverted pyramid" style, where the most important information is

provided first. This allows the reporter or editor to quickly decide if your event is newsworthy, and assign it to the appropriate reporter. It also helps you ensure that critical details of your event will be included in the final article, read by the casual reader, and not lost if there is a last minute space or time constraint.

The first paragraph should consist of 3 or 4 direct, concise sentences which clearly communicate the "5 Ws and one H:"

- Who is sponsoring or leading the event?
- What is the news? (Probably sponsoring or presenting an event.)
- When will the event occur?
- Where will the event occur?
- Why is this news important, or of interest?
- How will the event transpire? (Free or fee? Presenters, demonstrations, workshops, participation, discussions, hands-on activities, web-link?)

The second paragraph should provide more information about the topic to be covered, qualifications of presenters or leaders (generally info to encourage people to participate). For a complex or extended event, this section may have to be broken into two or more paragraphs.

A third paragraph may be needed to clarify information about fees, age limitations, liability waivers, food, parking, accessibility, timelines, or any items which participants should bring to the event (generally info helpful for those who will attend).

"About (Your Organization)," also referred to as "(Organization) Profile" or "(Organization) At A Glance." This short paragraph should include your organization name, purpose, publics or areas served, length of service, and the url of your website. Once developed, this piece of "boilerplate" may be used over and over. You may already be using one of these on your brochures or pamphlets.

Note attachments, such as photos, with title/description and photographer name.

Signal The End. A journalistic standard, three hash marks (###) centered directly underneath the last line, signals the end of your news release.

### **Miscellaneous Suggestions, Cautions, and Concerns**

- Read or listen to similar items as communicated by your local media. When your news release is used almost verbatim, you will know that you "have it right."
- Beware the risks of using "copy/paste." A news release template, with no specific dates, times, locations or names, will help avoid the risks to accuracy inherent in modifying a previous news release.
- Choose a basic font, 11 pt type, and minimize the use of all caps, bold, underlining, and italics. Avoid using the ampersand (&) or contractions. You do not want to create extra work for the reporter/editor.
- Write the news release in the third person (he, she, they). Save the "I, me, we" for quotes or emails sent directly to your organization members.
- Ensure that you have used simple sentences, and eliminated unnecessary words.
- Include sufficient "facts" to help define your writing as news, not just opinion.
- Add interest with a short quote from a presenter or other key person. Confirm the quote before including.
- Provide one or two photos, if available, jpg format generally preferred. Reporters and editors appreciate photos, especially if they support your news. Include a title/description, the names of identifiable people, and photographer credit.
- Provide appropriate website links, but include the complete url, not just an embedded link, so a printed copy of your news release will still convey a working link.
- Proofread the W and H items with special care. Then, proofread for spelling of names, missing words, duplicate words, punctuation, awkward phrasing, and undefined acronyms. Then, proofread the W and H items again!

- Our brain works against us when proofreading our own writing. A fresh pair of eyes, and a brain unencumbered by "what you intended to write," may be more likely to identify an obvious error.

### **Follow Up and Follow Through**

- Before you send out your news release, your contact person(s) or presenters should be prepared to answer follow-up questions. Local media may simply want someone to restate part of what is in your news release so they can use it as a quote. Radio reporters may want to enliven their report with the recorded voice of an event leader or presenter. TV reporters may also want to include short interviews, and they always appreciate an appropriate backdrop of the event site, related display items, etc.
- At this point, you may have a lot of time, energy, and personal interest invested in your event, but please consider that any telephone or email follow-up to your news release should be approached as making a "courtesy contact," not hounding a reporter to help promote your event. Ensure that your news release has had several days to arrive and be routed, sorted, and prioritized before offering further assistance.
- Depending on other newsworthy events (or lack thereof) reporters may show up at your event with little or no warning. Having a person and area tentatively identified for an interview will help minimize the disturbance of your event for the "paying customers," while promoting good media relations.
- We will discuss the "follow-up news release" in a future article.

### **Example WT Event News Release**

ABC Water Trail Association  
1234 Main Street, Anytown, IA 5xxxx  
Website: [www.abcwatertrail.com](http://www.abcwatertrail.com)  
555-123-4567 Office 555-123-8901 Cell

NEWS RELEASE  
FOR IMMEDIATE RELEASE  
Contact: Sue Jones  
555-123-4567 Office  
Email: [Sue.jones@abcwatertrail.org](mailto:Sue.jones@abcwatertrail.org)

### **Excavate History Along The ABC Water Trail**

Dateline Anytown, IA (May 1, 2013) - The ABC Water Trail Association will sponsor a hands-on exploration of local history at the site of an 1880's blacksmith shop in Johnson's Mill Park on Saturday, June 1. Participants will learn how to grid-map an archaeological site, select appropriate hand tools, excavate and sort materials, and identify found items. The 9:00 am-4:00 pm work session will be led by University of Iowa archaeologist Bob Smith. This event is free, but space and tools are limited, so advance registration is required. Register online at [www.abcwatertrail.com](http://www.abcwatertrail.com).

Archaeologist Bob Smith will be leading an archaeological assessment of the entire Johnson's Mill site beginning in the fall of 2013, sponsored by the XYZ County Historical Society, XYZ County Conservation Board, and the Office of the Iowa State Archaeologist. Smith stated, "The 1880's blacksmith shop is believed to have been destroyed by fire in 1901, and a corner of the site was disturbed by road construction in the park around 1940, but I believe that participants will still discover iron tools and other interesting items during our excavation." Any items found at the site will be retained by the XYZ County Historical Society for eventual public display.

Participants should meet at the picnic shelter just east of the main parking lot by 9:00 am for sign-in and orientation. The excavation activities are suitable for those aged 10 and above, and many will be accessible for those with limited mobility. Participants should bring gloves, a hat, sunscreen, and their own snacks. Drinking water and lunches will be donated by the XYZ Grocery.

About the ABC Water Trail Association: The ABC Water Trail Association was founded in 2008 to create a water trail on the ABC River through XYZ County. Upon completion of numerous access improvements, construction of two new accesses, development of interpretive materials, and installation of river and land signage, the trail received IDNR designation in 2011. The 100+ members of the ABC Water Trail Association continue to maintain, improve, and publicize the trail, as well as organizing events to promote a better understanding of the ABC River valley's history, culture, and natural environment.

Attachment: Digital photo of Archaeologist Bob Smith, by Bob Smith.

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## **IT AIN'T OVER WHEN IT'S OVER-- EXTENDING THE VALUE OF YOUR WT EVENT**

Your WT Event has ended, the participants have departed, the tables and chairs are stacked, the kitchen is clean. Hopefully your presenters all appeared on time, the AV equipment cooperated, you covered expenses, and you heard positive comments as folks filed out.

You have earned a good night's rest, but tomorrow morning, resist the urge to throw everything in a file drawer and jump on the next emergency. There is a brief window of opportunity to maximize the value of all your hard work, and you don't want it to slip away. Strategic follow-up can be the key to both short and long-term success.

In the first installment of this series, "Planning with Purpose for your Successful WT Events," we began by asking:

**Why do we need a WT Event?** Increase public awareness? Raise visibility of our efforts and our WT? Build support for development or funding? Grow the base of committed supporters? Engage local subject matter experts (SMEs). Recognize volunteers? Celebrate an accomplishment? Provide recreation opportunity? Provide education opportunity re history, art, or sciences? Engage youth in outdoor activities? Clean up the WT or a specific access? Construct or improve an access?

Whatever your chosen goals, they might have been obscured by all the planning, scheduling, and last-minute details, so reconsider and reinforce them as you wrap up your event.

### **Can you justify a followup news release?**

You distributed a news release in advance, but is there anything about the event's completion, results, or outcome that could be newsworthy? Were there any unexpected presenter announcements, competition results, project decisions, votes, or dates set that might justify getting a little more visibility for your event or group?

If so, refer to your earlier news release for format. Create a new title and opening paragraph about the newsworthy fact(s), a second short paragraph summarizing attendance at the event with a (positive) organizer quote, insert your boilerplate "about our organization" paragraph, add a couple of photos, then proofread several times. Time is critical on this—followup news has a very short life span.

### **We used to call it "housekeeping," but then "shopkeeping" became more politically correct.**

- Deliver on promises of additional information or materials to participants or presenters.
- Secure photos from volunteer photographers for possible use in a news release, on website, etc.
- Gather bills for prompt payment.
- Add event participants to your organization contact lists.
- Create an event summary for website and/or newsletter.
- Return any borrowed tables, chairs, audiovisual equipment, etc.



### **Reaffirm relationships**

Your mother exhorted you to write thank you notes, and Mom is always right! Keep in mind that it's a note, not a novel--keep it brief, include a couple of specifics, and thank them for their contribution to the event's success. Your appreciation may be the bulk of their compensation.

Thank you notes should be sent to presenters, co-sponsors, key volunteers, and those who provided financial support, in-kind donations, catering services, facilities, photographs, etc. Many, if not most, will be your partners in organizing future events. Emails seem to be perfectly acceptable, but a handwritten note is a special touch.

Co-sponsoring or donor organizations may appreciate a thank you summarizing the impact of the event, suitable for inclusion in their own newsletters.

Provide volunteer recognition via newsletters, websites, and special emails.

It is appropriate to thank news media, especially at the local level, for their efforts to cover your event.

### **Secure honest feedback.**

An email participant survey can gather quick feedback about your event's perceived value and opportunities for improvement, but it's also a useful vehicle to express your appreciation, publicize future similar events, or recruit volunteers.

A one-hour "reflection session" with your staff or key volunteers can create a brainstorm list of both positives to reinforce and negatives to work around, and maybe a couple of new ideas for future events. Focus on honest feedback about the event. Yes, you all may have poured your hearts into this event, but it's time to park your ego, listen, and learn. If appropriate, schedule another session to address your findings.

Compare feedback with your event goals. Did you achieve the desired participation, volunteerism, public visibility, fundraising, etc.? Did you at least make progress toward the desired goals?

### **Deal with the financial details.**

Ensure that you have received all anticipated bills.

Compare actual expenses to budget.

Schedule prompt payment of presenters, vendors, etc.

Follow up to resolve missing bills, unexpected expenses.

### **Prepare a single page summary of your event.**

Your file can also include copies of planning goals, checklists, contact lists, presenter confirmations, vendor quotes, news releases, etc., but your single page summary should give you quick access to:

- Event name, date, location, brief description of activities.
- Presenter, topic, time frame, contact info.
- Key volunteer organizers for event.
- List of financial or in-kind supporters.
- Number of participants.
- Positives from feedback.
- Negatives from feedback.

### **One last thing.**

Following the suggestions in this series could very well increase the success of your events, facilitate easier organizing and execution of future events, and create a more professional image for you and your organization. A solid collection of planning documents, checklists, news releases, and communication follow-ups will make it easier for your organization to continue its important work, no matter who may someday sit in your chair. A few examples in your private collection might also be helpful, no matter which chair you may someday occupy.