**The role of the Reservations Steward**

By HL Guy de Dinan and others

V.1 AS.58, being May 2023 in the Gregorian calendar.

**Introduction:**

The Reservations Steward is a critical role for any events team and is an excellent way to introduce yourself to the management and use of data, some observations of which will be discussed below. In essence, the role is both administrative and also the social first point of contact for the event.

With the evolution of online applications, this role has been enhanced by online automation of attendee registration and organisation of information that helps fuel your event.

This role should be one of the first to be appointed in an event team, and where an event becomes larger and complex, consideration should be to bring in an assistant to help spread the load. Event teams should be meeting regularly to keep everyone up to date with developments, tasks and stages of the plan.

**Before an event.**

Please familiarise yourself with the Event Planning Timeline advice (published separately). Events are primarily advertised with online registrations. The rise of online forms such as Google, and booking apps such as Eventbrite, have taken a lot of the manual work away from registering attendees.

**A note on Data Management**

You will be receiving, controlling and processing personal information of attendees. Familiarise yourself with GDPR procedures and definitions. Check with your event steward and/or sponsoring group seneschal for advice and policy on Data Management. At time of writing, Insulae Draconis is looking to complete a data management policy.

**Some overarching Principles:**

* Only ask for data relevant to the event
* Make sure that no data is held on your personal means of communication. Request or set up an email dedicated to the event reservations, or ask to access an existing SCA email. The Principality web team can advise on this.
* Make sure the event has a GDPR statement on the use, retention and deletion of reservations data. While it is convenient to retain data from previous events, e.g. for allergies, it is illegal to do so as the legitimate use of the data has ceased. Additionally, a person’s circumstance can change, and using out of date information like this can cause a medical problem, harming the affected attendee and risking the event and yourself.

**Setting Up a Form**

An event web page or website is easy to create and access. Your event steward will either do it themselves, or appoint a team member responsible for that site. Practical Drachenwald and the Principality Web Team can advise.

**Pros and cons of approaches:**

|  |  |
| --- | --- |
| Online Form (e.g. Google Forms) | Online event Service (e.g. Eventbrite) |
| Pros | Cons | Pros | Cons |
| Easy to set up from a google email | Still have some manual processing work | Ability to take payment as well as book on same form | Takes a fee on monetary tickets |
| Can export directly into a planning file – e.g. Practical Drachenwald’s Toolkit |  | Useful set of support tools including email scheduling, analytics, and typesetting | Information difficult to integrate into event planning |
| Can create mail merge using Gmail |  | Data held securely and at less risk of user data breaches |  |
|  |  | Visually attractive emails and interface form your website |  |

Standard form requests include the following information requests, so set up your fields accordingly. It is now fairly normal for a form to have over a dozen fields, especially if your event has accommodation options. Decide which information is essential and make sure the compulsory option is selected. No compulsory information = no booking. Mention forms of acceptable payment, including if instalments are in operation for this event. Specify when bookings will close – usually a few days before the event, or when the event is full.

**Key elements are (but not limited to):**

Real name and SCA name

Membership number (for events that offer membership discounts)

Email

Is this their first event? Do they need any kit?

Any medical allergies and who that info will be shared with specifically. Have a separate agreement for people to tick to consent to share this information to the catering/cleaning team. NB personal preferences are not a required item to address. Also, not just food, but also cleaning materials and other contaminations count as a medical allergy.

An agreement to abide by the Code of Conduct (include link)

An agreement to abide by any health directions (e.g. if you are ill, don’t come)

Type of booking (as per agreement of the event plan)

How the data will be used and disposed of. (Event team needs to set this policy, consult with the sponsoring seneschal if unsure)

Willingness to volunteer to help the event. (The more, the merrier, you will need additional labour on the day)

Requirements – accessibility, family together, quiet rooms, people to avoid sharing with, etc. Late arrivals.

Most systems, including Google forms and Eventbrite, have the ability to create an automatic response. It is strongly recommended that you set up such a response to acknowledge receipt and outline the next steps that attendees can expect (e.g. payment instructions, directions to site, etc.).

**Payment Email**

Draft your payment email in advance, and familiarise yourself with the bulk email approaches. Include all payment options and how to calculate total owed. For a smaller event and if you have the time, you can individually personalise the amount owed.

For electronic payments, always ask for a reference to be included on those payments – SCA name is best and if room, the event name or abbreviation.

Make sure you have a good relationship with the exchequer who controls the bank account people pay into, as they need to keep you up to date with payments. The Practical Drachenwald Bookings Engine has the ability to track this as you receive updates, thus ensuring you can create chaser reminders and sign in sheets that record any balances to pay. The majority of attendees will likely pay in advance.

If your event is accepting instalments, make sure the terms of those instalments are in the email and ask people to notify you if they plan to pay in that fashion. Make sure this information is in your attendee spreadsheet.

**Communications in general**

Keep your channels clear. If the event steward needs to send out a message, get them to pass messages via yourself. You keep a better idea of what has been sent out and avoid mixed messaging.

Best Practice is to keep a separate record of what and when has been sent out to attendees as there may be information needed by later-registering attendees. Make sure your social media messaging and email messaging matches – the best method is to post relevant information on the website and direct people via email and social media to read the update there.

You may consider an emergency phone number, but first consider:

1. whose phone it is, preferably get a burner phone dedicated to this activity, otherwise this will be publishing private contact information.
2. who will be responsible for it - likely the desk team
3. making sure it remains charged
4. the scenarios for your event that someone will use it, and how you are going to respond to that. This is including, but not exclusively:
	1. attendees who are lost/transport failures
	2. extremely late arrivals

**Information management**

Keep access to the bookings information to a minimum. The whole event team does not need to know who is coming, only numbers and categories. The rule of thumb is “what is the operational need for someone to have access to the information?” Consider how accidental access could occur, what the consequences of the release of information would be, and prepare accordingly. You might occasionally come across a site requiring a list of attendees. By and large this practice has ended, but make sure their request is a)reasonable and b) within GDPR reasoning. If this test is not passed, you have a site over-reaching itself and you need to talk to your Event Steward and Sponsoring Seneschal.

**On Allergies**

The catering team will want to know any medical allergies so they can consult and prepare accordingly. Most of Drachenwald’s cooks are able to cater for allergies, however, there may arise a situation where someone’s allergies are unavoidably impossible to cater for and you should consult with the cook/clean-up captain and also the Accessibility and Inclusion Team. . The cleaning team will need to know certain allergies too, e.g. citrus, lavender and rubber in cleaning materials have all been flagged before as anaphylactic shock risks. This will inform the purchasing of cleaning materials.

**Updating your Event Team.**

Regular updates of the attendee numbers are needed to track the budget and if the event is going to be successful.

Note and report on the number of bookings against event limits – number and type of accommodation booked, day-trippers, etc. Where there are complimentary places (Royals, key staff – the cook for instance who is spending the event in the kitchen for others enjoyment – children, etc.) keep an eye on those, as there can be a risk of double-booking/being missed off. Take note of, and gain acknowledgement from your event steward, any special requirements – e.g. family rooms, quiet rooms, accessibility requests.

Day-trippers need bearing in mind if you have a day-time attendance cap for the event - e.g. overcrowding rooms, fire safety, etc.

Make sure your registration desk times are flagged on the website, and what people need to do if they arrive outside of those times (e.g. wait until the next opening time, etc.Having accommodation labelled in advance helps against having people wandering lost on your site.)

If you have first-time members or people needing kit (for example they are coming in from abroad and can’t carry kit), make sure your event steward is aware of this and can make arrangements for loaner kit.

**Accommodation Allocation**

It is recommended to have someone appointed just to deal with this, especially if the event is large and/or you have several categories of accommodation, or a need for a tent-pitching plan. Set up a clear way of recording who is being allocated to which part of the site. Royals tend to have a need for a dedicated room for themselves and people in support of them. Keep families together. If possible, allocate the cooking crew as close to the kitchen facilities as possible.

Make sure there is a map of the venue and where the accommodation rooms/tent areas, etc. are. On the day, make sure doors are labelled with the names of who is staying where.

**One Last Thing before you go**

Make sure you have your own team for the registration desk. You can include requesting volunteers for this in one of the event emails, or have people already in mind.

Make sure they know their offer to help is accepted and what to do on the desk. Make sure these times are in the final reminder email that goes out to the attendees.

**On the Day**

**To Bring,** or ensure that you, or the person who has them, ensure that the following arrives at a clearly identifiable place/table. You will also need to know who is taking these items (or remainder of items) home with them:

The sign-in Sheet – alphabetised by real surname, SCA name, any amount left to pay, Signature box to sign in and confirm that attendee is fully-paid up, signature to say they have read and agree to the Code of Conduct and any site rules. Use large font for ease of reading and locating where to sign – especially for large events.

A copy of the waiver(s) in place for the event – include name and signature boxes.

A copy of the Code of Conduct, to be attached in a prominent place.

Volunteer Sign Up Sheet(s)

Pens

A secured cash box with a float (check finance policies on acquiring and using a cash float). Confirm who is paying in the money after the event. Probably you.

Card Reader (if your team is using one)

Event tokens (if issuing them)

Handouts (if the event is using them)

Post-it notes are very handy

Blu-tac or cellotape for any signage (where the venue permits!)

Emergency phone (if you are using one or the event steward hasn’t adopted it)

Schedule print out – you will always be asked for this, but also remind people where to find it online for download. If you are using the Practical Drachenwald support tools, the schedule is automatically live and downloadable.

**Sign-in Desk Routine**

Confirm the amount of cash in the money box and note it.

Maintain a friendly approach. If you are asked questions that you do not know the answer for, say you will ask the event steward when they are available.

Check the sign in sheet for their name. Check for any outstanding payments and politely request payment if they still owe money. If you experience difficulties over this, ask someone to find the event steward to agree to any arrangements and make a note of any such arrangements. It has been known for cash to be in the box, but someone has not signed their name yet, and vice-versa. Please can you and your support volunteers be diligent as it saves a headache later. If someone says they’ll pay later, make a note of that.

Ask them to read the Code of Conduct and any local event/venue rules, make sure they know where to look for emergency information.

Direct those who have asked for any loaner kit to where they might find it. If you have kit items on the desk, note that such items have been picked up on the sign in sheet.

**After The Event**

This is all about squaring the books. You’ll need to liaise with the exchequer who has access to payments and there is likely a spot of cross-referencing the sign-in sheet and the online and cash payments.

Upon the last closure of the sign-in desk, make a note of the amount held, the amount of float (this sometimes can be forgotten that it was added to the box), any deductions (but see Principality finance policy on rules for removing money from the cash box).

When at home and assembling the information:

Note the number of paid members and anyone who paid as non-members

Note the number of concessionary rates paid

Note children attended

Note anyone who has turned up but not paid

Note anyone who did not turn up but also did not cancel - technically they owe a fee, but with the communicable disease policy in effect, discuss with your event steward on the efficacy of chasing.

Identify discrepancies and consult with event steward if investigation is needed.