

GUIDE FOR EVENT PLANNING

Based on UCLA Events & Protocol
Designed by Kim Hovren, Risc2Solutions©

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Request & Process:

The following is to be filled out by the Event Leader. This form is to serve as an Event & Marketing and Promotional process guide for the Marketing Director, Event Leader and club volunteers.

- Event & Marketing/Promotional requests should be submitted **no less than 90 days prior** to the event date.
- Publish Date Required: All marketing requests are date driven. Please define & submit required date for publication.
- Frequency: Define dates that notification needs to be repeated or distributed.
- Budget: An approval by the club board of directors is required for all media/promotional purchases.
- Content Approval: Designated club board members must approve of all information distributed to it's membership and general public.

Term Definitions:

Marketing/Promotions/PSA: Public Service Announcements

Club supported Event, Trip or General club information that needs Marketing and Promotional support requires details. For all marketing materials, in order to be **published and distributed** should contain the following details:

- *Provide Date, Time & Event information.*
- *Artwork &/or pictures are recommended (logos, etc) in a .jpg or .pdf format.*
- *Social Media Link information*
- *Event Contact*
- *When request is completed, submit to Marketing Director –marketing@bogusbasinskiclub.org*

Other Event Materials to consider:

- Membership Forms – *Contact Club Membership Director*
- Cash & Payment – *Contact Club Treasurer*
- Club Affiliate information: Intermountain Ski Council, FarWest Ski Alliance, Other
- Trip/Event Information
- Raffles and Promotional 'SWAG' super,wonderful, all-together great stuff! – *Contact Designated club member*

Financial Summary:

- Please include with this report the Financial Summary. Required information.

Section 1: Event Committee / People Resources & Responsibilities

**EVENT PLANNING CHECKLIST
for Non-Profit & Volunteer Organizations**

Committee	Position/Dept	Notes	Contact
Vicki Kuebler	Co-Chair		
Don Pribble	Co-Chair		
Kim Hovren	Marketing Dir.	Promotions; Vendor Booth requests; Ski Race	
John Hart	Marketing Dir	Bogus Basin	
VENDORS			
Signs 2 u		3x9 BBSC logo stickers & banner update - Payment: invoice BBSC	Bradley Backstrom sales@Boisesigns.com 208.985.3180

MARKETING / PROMOTIONAL REQUEST

ULLR FEST on Bogus Basin Saturday, January 23, 2016

Date of Request: September 2015- Begin

Name: Kim Hovren, Marketing Director.

Please check and provide details of your requirements. Thank you!

Promotion Categories	Yes	No	Publish Date Required / Frequency	Budget\$	Comments/Requests	Done
PSA	X		NOW		Create; edit to fit media channels.	X
E-Publicity						
E-Blast	X		Begin December 2015		See email from Vicki; Confirm with Darryl website calendar update; frequency; volunteer request & requirements;	X
Web-site	X				Carol Peterson, Communications Dir.	
Social Media	X				Through merchant vendors; Bogus web-site; Need to request and submit information to channels.	X
Military					Mtn Home – Special Day for families? No time budgeted to develop. Recommend for next event.	NO
Media						
Radio	X				Submit through local channels;	X
Television	X				Submit through local channels; Channel 2 on site; Coverage of event aired AM, Noon, PM	X
Video / DVD (stand-alone)		X				
Other						

Promotion Categories	Yes	No	Publish Date Required / Frequency	Budget\$	Comments/Requests	Done
Print Advertisement						
Print: Newspaper / Magazine	X				See: list	X
Community Calendars	X				See: list	X
Posters	X				At Bogus Basin lodges; Simplot & Pioneer	
Hand-outs / Flyer information	X			Budget TBD	Sponsors, ½ sheets with logos	
Quarterly Update Mailer		X			1/05/2016: Recommend a 'SAVE the DATE' card to be mailed to membership this week.	X
Mogul	X				Communication Director; confirm next scheduled newsletter (TBD)	
Billboard	X				Electronic above road going to Bogus; reader boards with sponsors; Update – Electronic board, not working above Bogus rd.	
Poster Panel		X			Vicki	
Other						
Event Signage						
Banner	X				Update and Hang at ticket office or lodges	
Table cover	X				Day of Event	
Event signs	X				Games – Bean Bag Toss and Fry Pan Throw	X
Blade logo	X				Day of Event / 2 sizes Tall 12 ft and 6ft	X
Other						
Other						

Promotion Categories	Yes	No	Publish Date Required / Frequency	Budget\$	Comments/Requests	Done
MISC						
<i>Event Branding</i>	X				John Hart – Created Logo	X
<i>Booth Sponsors</i>	X				See documents: ULLR FEST > Booth form_ullrfest2016 v2.pdf and Event Requirements and Confirmation of Participation v3.pdf (with out insurance req.)	X
<i>Logos</i>		X		CHANGE IN STATUS	44 degree North Vodka – Sponsor Hood River Distillers. Booth Sponsors (Kim & Don) 01/05/2016 Major sponsorship declined \$500. Donate snowshoes and swag	
<i>Medallions</i>				Confirm	Printed, lamenated; hand made for placing on runs	X

ULLRFEST 2016 – VENDOR BOOTH LIST

Vendor Booth– Contact Name	EMAIL	PHONE	NOTES
Glory Days Ski Museum - Kirk Luba	kirkluba@gmail.com krissylyuba@gmail.com	208.629.8329	Confirmed, yes by Vicki Kuebler Sent 12/16 PSA – 01/04/16
VertiGals - Tina Richards and Nancy McCullough 01/5/2016 Will be supplying volunteers for games.	tina.boise@gmail.com idahonan@gmail.com	577.7680	Confirmed, yes Sent 12/16 PSA – 01/04/16 LEFT MSG 1/19; confirm participation.
Recreation Unlimited Jon Primavera – Events Clancy Anderson – President Adaptive Ski/Board lessons	contact@recreation-unlimited.org clancy@flavorsonion.com	208.870.4690	Confirmed, yes Sent 12/16 PSA – 01/04/16
Ski Patrol - Carol Peterson	communications@bogusbasinski.club.org	208.890.1839	Confirmed, yes Sent 12/16 need to confirm the person to send PSA information.
SheJumps - Kim Holloway and Stacey	sjhoppoway@gmail.com www.shejumps.org	208.866.6152	Confirmed, yes PSA – 01/04/16
BBSEF – Bogus Basin Ski Education Foundation - Mark Wedeking and Shannon Carrell	skierguymw@gmail.com info@bbsef.org shannon@bbsef.org		Confirmed, yes 1/19 Sent 12/16 PSA – 01/04/16
Scandinavian Society – Alan Stroud and the Sons of Norway	coteach2000@msn.com	939.4763	Confirmed, yes PSA – 01/04/16
Air St Luke's - Elizabeth Butler	butlere@slhs.org	208.381.8788	Confirmed, yes PSA – 01/04/16
Greenwoods Ski Haus - Carrie Gochner	skihaus@fiberpipe.net	208.342.6053	Yes, JJ McLeod Sent 12/16 PSA – 01/04/16
McU Sports - John Klotz, Chuck Cremer, Matt	johnwklotz@mcusports.com ccremer@mcusports.com matt@mcusports.com	208.336.2300	Yes, JJ McLeod Sent 12/16 PSA – 01/04/16
The BOARDROOM – Chris Heise 01/05/2016 I will be away from The Boardroom January 3rd through January 7th. During this time I will have limited access to email and plan on responding upon my return. For immediate assistance please contact the shop directly @ 208.385.9553	chris@boardroomboise.com www.boardroomboise.com 2727 W. State St. Boise, 83702	208.385.9553 C: 890.3507	Yes, JJ McLeod Sent 12/16 PSA 01/05/2016

Vendor Booth– Contact Name	EMAIL	PHONE	NOTES
Boise Curling Club – Vince Carlson	vince@boisecurlingclub.org	208-310-1843	Confirmed, yes sent 12/16
Curling Club - Jaren Belsher	info@boisecurlingclub.org	208.310.1207	
Snow Riders – Dennis Swift	sluggish1@cableone.net	208.344.7148	No confirmation. Sent 1/12 Dennis is on a trip; Encouraged group to make decision to participate.
Idaho Mountain Search and Rescue, Jimmie Yorgensen 01/5/2016: Delinda Castellon (Public Relations Director for IMSARU) and Carolyn Sukkha (member/liason of both IMSARU and Bogus Basin Ski Patrol) for their interest. Delinda is going to handle this event and will be our contact moving forward.	jimyorgensen@msn.com	342.0809 or 345.1450	Confirmed, Yes Sent 12/16 PSA – 01/04/16
College of Idaho - (Ski Team) Ron Bonneau and (Alumni Association) Sally Skinner and Ron/Mary Bitner; Jack Cafferty, Joe Hughes	robonneau@collegeofidaho.edu sskinner@collegeofidaho.edu	Wk: 459.5863 iph: 761.6411 wk: 459.5770 (sally)	Declined; Sent 12/16 Ron declined; races No other responses
Moxie Java - Ken Stokes, President	kens@moxiejava.com	Wk: 208.246.8507 iph: 208.867.9973	Confirmed, Yes Meeting: 9:30am / Jan. 15, Friday, office of Ken Stokes.
George's Cycles – Frank Leone & John Post	fleone@georgescycles.com jwpost@mac.com	NO; can not participate this year	Declined; Fat tire snow bikes; sent event docs; can not commit this year due to moving retail space to another location; staff needed.
Bogus Snow School and Mountain Discovery	snowschool@bogusbasin.org http://snowschool.squarespace.com/		Ilyse Sakamoto Sent 12/28 Did not respond; take off list.
Hailey Duke – USSA past team member, Olympics Alpine Dad, Larry Duke	lduke45534@aol.com		Invite sent 01/04/2016 No response
Sierra Trading Post – Andrea Tompkins, purchasing	atompkins@sierratradingpost.com		No response; Sent 1/13
Intermountain Touring – Chris Haunold / Dax Tobin	chris@intermountaintouring.com		Pending response; Sent 1/12 gifts and prizes; not vendor booth

Vendor Booth– Contact Name	EMAIL	PHONE	NOTES
Vikings of Idaho – Brian Kreis	jeffersonianglory@yahoo.com https://www.facebook.com/VikingsofIdaho/		Yes, confirmed 1/20. Sent 1/13


Confirmed:

3spaces - BBSC
 Bogus Basin Recreation Association
 Moxie Java
 Glory Days Ski Museum
 BBSEF - Bogus Basin Ski Education Foundation
 Ski Patrol
 SheJumps
 Scandinavian Society
 Air St. Lukes
 Greenwoods Ski Haus
 MCU Sports
 The BOARDROOM
 Eco Lounge – *Don, Please confirm that you have a confirmation; the working connection has been through Vicki.*
 Boise Curling Club
 Idaho Mountain Search and Rescue
 Recreation Unlimited
 Vikings of Idaho (Set up Inside Simplot Lodge)

Not Confirmed:

Hailey Duke
 VertiGals – *Don, do you have booth form confirmation? Left message with Tina Richards today 1/19 as a follow up. Not heard back.*
 Sierra Trading Post
 Snow Riders
 Bogus Snow School and Mountain Discovery

Media Contact List: PSA - Press Release for Media & Publications Report date: Jan 5, 2016
Kim Hovren – Marketing Director, Bogus Basin Ski Club
For ULLR FEST at Bogus Basin Saturday, January 23, 2016

1. **SAVE THE DATE** mailers – To membership – Budget approval required by board. (NO, vote by board)
2. BBSC member Eblast - Confirm Date – First Week Jan.
3. Boise Weekly: Calendar calendar@boiseweekly.com Submitted:
4. Poster & Distribution: Merchant sponsor sites; General public points
5. **Flyers:** \$150 budget / Actual: \$
6. Association & Sponsors web-site & calendars: Prime Timers, Vertigals, Bogus Basin, Rec Unlimited, etc. (see list)
7. Idaho Statesman E-Calendar: submitted:
8. Boise Weekly E-Calendar: submitted
9. On your Side – Channel 6 E-Calendar <http://www.kivitv.com/community/community-calendar/submit-events> submitted:
10. MCU Sports Calendar info submitted:
11. Greenwood's Ski Haus Calendar info submitted:
12. BBSEF Calendar info; Admin Director  [Shannon Carrell](#) and Mark Wedeking Submitted:
13. Idaho Statesman – Calendar Michelle Jenkins Submitted:
14. Idaho Statesman: Michael Deeds Submitted:
15. Idaho Press Tribune Submitted:
16. Idaho Statesman Newsroom Submitted:
17. Idaho Statesman – SCENE submitted:
18. Television: Channel 2 – Natalie Hurst Submitted:
19. Channel News 7 – Channel 7 KTVB Studios 5407 West Fairview Avenue Boise, Idaho 83706 Phone: 208-375-7277 submitted:
20. TELEVISION KIVI Submitted:
21. Steve Bertel - Assignment editor
Grendel Levy - News Director –
22. Dan McColly - Manager, marketing & Creative Services -
J. Bates - On Site Digital Director
23. RADIO Submitted:
24. Tim.johnstone@RiverBoise.com Tim Johnstone
25. Steven.plante@scripps.com Steven Plante
26. Boise State University – posters / communications@boisestate.edu submitted to Office of Communications and Marketing.

Section 2:

EVENT FACT SHEET Event day and date

- Event:** Name of event
- Date:** Day of the week and date
- Time:** Time of event
Arrival time of program participants
- Location:** Venue, building and room number or outdoor location
- Guests:** Guest category list (faculty, staff, students, donors, volunteers, community, etc.)
- Purpose:** Goals and objectives of event
- Format:**
- Event: List basic event format (reception, dinner, lecture)
 - Program: Actual start time
 - Introductions and Welcoming Remarks (list program participants)
 - Keynote speaker
 - Awardees
 - Closing Remarks
 - Stage/Program Setup:
- Budget:** Approved budget
- Statistics :**
- | | |
|-------------------|---|
| Invitations sent: | Total number of invitations sent |
| Accepted: | Number of acceptances/rsvps |
| Actual: | Actual number of attendees |
| Attrition: | Difference between acceptances and actual attendees |
| Cost per person | Final budget divided by number of attendees |
- Sponsor:** host of the event and responsibility for all expenses
- Contact:** Name of event manager, phone and email

Section 3: Statement of REVENUE & EXPENSE

**ULLRFEST at Bogus Basin
Marketing/Promotions Expense Budget**

Date: January 23, 216

Prepared by: Kim Hovren, Marketing Director, Bogus Basin Ski Club

	Budget Estimate	Actual	DIFF	Comments / Items
Beg Cash				(Beg. cash is not accounted in total revenue; for cash reconciliation, only)
Cash				
Checks				
Pre-Paid				PayPal
No Fee				# of Guests
Total Deposit		\$0.00		Date of Deposit / Name
Attendance			0	
REVENUE				
Raffle			\$0.00	
Trips			\$0.00	
Event Passes			\$0.00	
Memberships			\$0.00	
Other			\$0.00	Donations
Other			\$0.00	
Total Revenue	\$0.00	\$0.00	\$0.00	
EXPENSES				Marketing/Promotions Expense Budget
Food & Beverage			\$0.00	N/A
Entertainment			\$0.00	N/A
Park Fee			\$0.00	N/A
Supplies			\$0.00	
Other Fees			\$0.00	
Misc			\$0.00	
Reimbursements			\$0.00	
Publicity/Marketing			\$0.00	
Other			\$0.00	
Print - Donation		\$100.00	\$100.00	Evans, Keane – Attorneys at Law
Total Expenses	\$0.00	\$0.00		\$150 budget; ULLRFEST Committee approved (Sept.2015)
Net Revenue	\$0.00	\$0.00	\$0.00	Total Value of event that is underwritten

Section 4:

Summary Statement of REVENUE & EXPENSE

ULLRFEST at Bogus Basin

Marketing/Promotions Expense Budget

Date: January 23, 216

Prepared by: Kim Hovren, Marketing Director, Bogus Basin Ski Club

BUDGET (Current Year)	Event Name (Previous Year)	Estimated (Current Year)	Actual (Current Year)	Difference Est/Actual (Year)	Difference
Revenue					\$0.00
Expenses				\$0.00	\$0.00
Total			0	\$0.00	\$0.00
Attendance					

Event budget presented & approved by Board of Directors – Date: _____

FINANCIAL SUMMARY: *(Enter details here)*

1. How was Revenue generated?
2. Cost Per Person:

OTHER NOTES: *(Enter details here)*

Section 5:**CASH RECONCILIATION***EVENT:**DATE:**Date of Deposit:**NAME:*

Bills	Quantity	Total
ONES	25	\$17.00
FIVES	10	\$50.00
TENS	6	\$60.00
TWENTY'S	5	\$100.00
CHANGE	0	\$0.72
TOTAL		\$227.72
CHECKS / NAME	CHECK REF	TOTAL
Name	#####	\$10.00
Name	#####	\$25.00
Name	#####	\$50.00
Name	#####	\$25.00
Name	#####	\$25.00
Name	#####	\$25.00
Name	#####	\$25.00
TOTAL		\$185.00
TOTAL for DEPOSIT		\$412.72

Section 6 :

EVENT PLANNING CHECKLIST for Non-Profit & Volunteer Organizations

Event Title

Date

- *Established event: Schedule is 3 months or Twelve Weeks (90 days) Before the Event Date*
- *New or Resource Intensive event: Schedule is 6 – 12 months Before the Event Date*
 - *Target: _____ # people*
 - *START DATE _____ END DATE _____*

New/Resource Intensive events: 24+ Weeks Before the Event

Established events: 12 Weeks Before the Event

START DATE _____

- Call planning meeting; set date and time; send invites accordingly.
- identify events committee:
- review previous years event information
- use *Events fact sheet* event outline for proposal guide line.
- determine the purpose of the event
- determine event sponsors and/or collaborative organization partners
- choose a tentative date
- check availability of event venue (consider requirements of your specific event and audience)
- identify the intended audience
- decide on performers, entertainment, speakers
- establish initial budget
- submit event proposal to Board of Directors for discussion and approval

New/Resource Intensive events: 22+ Weeks Before the Event
Established events: 11 Weeks Before the Event

DATE _____

- conduct community needs assessment
- confirm & delegate tasks (marketing, publicity, logistics, food, speakers, decorations, evaluations, volunteers, etc.) ***Note: include food ingredients for allergy sensitivities.***
- reserve space & process special facility requests (permits; early AM, late PM, etc. Consider extra costs.)

New/Resource Intensive events: 20+ Weeks Before the Event
Established events: 10 Weeks Before the Event

DATE _____

- finalize the date, time and location of event
- contract entertainment, if needed.
- confirm equipment needs of vendors.
- meet with catering for food and beverages
- reserve audio / visual equipment
- order prizes and souvenirs
- make arrangements for ticket sales (distribution, costs, receipts, etc)
- reserve security, if needed
- arrange for transportation, if needed
- arrange for visitor parking, if needed

New/Resource Intensive events: 18+ Weeks Before the Event
Established events: 9 Weeks Before the Event

DATE _____

- decide on a theme and title of the event
- develop an advertising and publicity plan
- confirm contract requirements and fulfillment of contract riders
- finalize budget

New/Resource Intensive events: 16 Weeks Before the Event
Established events: 8 Weeks Before the Event

DATE _____

- submit all marketing & publicity event copy to Board of Directors for publishing approval prior to posting on public venues for media & advertising.
- proofread advertising (including for copyright matters)
- submit request to publish on web-site, Constant Contact, and other public media venues.
- identify VIP list

New/Resource Intensive events: 15+ Weeks Before the Event
Established events: 7 Weeks Before the Event

DATE _____

- begin publicity event notifications (ex: invites, community calendars, mailers, merchant flyers / posters, banners etc.)
- begin working on decorations (ordering flowers, balloons, special print table service, plaques, etc.)
- invite VIP; inform of special requirements; Free admission as our guests

New/Resource Intensive events: 13+ Weeks Before the Event
Established events: 5 Weeks Before the Event

DATE _____

- begin posting publicity in public places
- organize volunteers for events
- review and submit requests for final advertisements, event invites.
- begin to follow up with special event sponsors, supporters & participants for their continued support.

New events: 12+ Weeks Before the Event
Established events: 4 Weeks Before the Event

DATE _____

- follow up with vendors
- provide event statistics to event committee and Board of Directors
- remind members to invite families & friends; design e-vite so it can be forwarded to their personal email list
- create event evaluations for members / participants to submit information critical to future strategic planning.
- send out speaker and volunteer agenda
- request from key positions to prepare materials for day of event; provide estimated # of event participants.

- determine if a mailer with events schedule should be sent to membership

New events: 10+ Weeks Before the Event

Established events: 3 Weeks Before the Event

DATE _____

- check facility set – up; invite vendors / entertainment / volunteers.
- confirm contracts & permits
- conduct an events needs assessment and publish to events committee & Board of Directors.

New events: 8 Weeks Before the Event

Established events: 2 Weeks Before the Event

DATE: _____

- confirm volunteers; list names, time scheduled, contact info
- confirm materials required for information
- confirm cash box
- confirm VIP list
- refresh & resend publicity event notifications (ex: invites, mailers, merchant flyers / posters, banners etc.) ***Note: Sent out Event Statistics on a weekly basis.***
- confirm speakers & submit program agenda
- Confirm logistics of equipment delivery, set-up, take down –

EVENT AGENDA:

Note: This is an email sent out prior to event that provides the board and volunteers the recap of needs & commitments. The event leader then uses it for tracking and event schedule purposes on the day of event.

Day of Event

DATE: _____

- set-up for check – in, ticket sales and other information distribution
- confirm volunteers arrival & name tags
- make available at check in the VIP list; special requirements:
- post pertinent permits -
- decorate
- distribute and collect evaluations

- pay performers AFTER the event

Week after Event

DATE: _____

- send thank you notes
- reconcile all invoices ***See: Event financial report***
- meet with the event planning committee to evaluate the event
- submit event P&L and summary to Board of Directors
- Press Release information to Membership / or General Public through established media routes.

DATE: Before next scheduled Annual Board Meeting:

- Propose next date & time for next year to board for approval.
- Confirm Event Leader for next slated event

END.

Section 8 :

Event Survey

Event Name

Date

Please check the rating that best applies to each category. Use back of form for additional comments. Thank You!

Event Description	Excellent	Good	No Change	Needs Change & Improvement	Comments
Date of Event & Time					
Location					
Cost					
Event & Trip Information					
Access & Lay-out of Event					
Speakers Format					
Food & Beverage					
Entertainment					
OverAll Experience					
TOTAL					

Process: Choose method(s) accordingly:

1. Provided in hard copy to each board member during a regular stated meeting, after each event.
2. Send to individuals / membership by electronic method (constant contact, survey programs.)
3. Made available at the event for participants to fill-out.
4. Results to be based on Total number of participants, Total forms filled out, and rating totals for each category.

Section 9 : Inventory & Equipment Resource List

Inventory – Equipment List owned by			
08/20/13			
Storage unit 390	Republic Maple grove	665 S maplegrove	
	376-6000	Boise, ID	
Need Key and Pass Code			Event Name
Item	Number	Location	
Tables long	4	Storage unit	required
Table short	1	Storage unit	required
Step ladder	1	Storage unit	
Display Kit	1	Storage unit	
Tall Banner	1	Storage unit	required
Beer tap with co2	1	Storage unit	
Tail gate banner	2	Storage unit	required
Pop up tents	2	Storage unit	
Rims for Banner	2	Storage unit	?
Lawn signs	2	Storage unit	required
Coolers	4	Storage unit	required
Coffee pot 70 cup	1	Storage unit	required
small drink cooler	2	Storage unit	required; carry fresh water for coffee
Lamp battery operated	1	Storage unit	
k bob skewers	6	Storage unit	
Hot dog forks long	20	Storage unit	
1/3 pans	5	Storage unit	
roster oven	1	Storage unit	
casino night stuff	bunch	Storage unit	
SS punch bowl	1	Storage unit	
X mass decorations	bunch	Storage unit	
canopies	3	Storage unit	
hot drink dispensers	3	Storage unit	
Wind blade	1	Storage unit	yes
Storage bag	1	Storage unit	
Computer	1	BBRA Office	
36" sharp lcd TV	1	BBRA Office	
Display case	1	BBRA Office	
Large wheeled B b Q	1	G.Medek	confirm with board
Flat Screen TV	1	K.Hovren	
yurt stuff			

Section 10: Schematic

Section 11: PDF History & Details of Receipts /Permits/ Minutes / Etc.