



JSA Event Management Workshop

Tuesday, April 30, 2019 7 - 9 PM at Larchmont Yacht Club

This year's workshop will provide a hands-on demonstration of JSA's upgraded Regatta Registration and Management platform powered by Clubspot, which incorporates the Regatta Toolbox system rolled out last summer (bring your laptop or tablet). The workshop will also feature a special presentation with open discussion to guide race officers about effective ways of managing large numbers of boats on the starting line. We'll also review the updated templates for the Notice of Race, Sailing Instructions and race courses that are used by hosts of JSA qualifier and championship events.

7:00 Opening Remarks Alex Helfand, JSA Vice Chair

7:05 Regatta / Event Preparation

- Discussion led by Warren Costikyan, JSA Board Member
 - Regatta Management Resources - where to find them
 - Review of JSA Regatta Playbook
 - Overview of 2019 NOR and SI Templates

7:35 Large Fleet Optimist Race Management

- Discussion led by Dave Waldo, Executive Director at The Waterfront Center and JSA Vice Chair
 - Course selection
 - How to manage a large number of boats on a line

8:00 Break

8:05 Clubspot for 2019 (previously known as Regatta Toolbox)

Discussion led by Sheelagh Thomson, JSA Board Member

Clubspot Structure from the host club perspective.

Given the differences (Clubspot vs. Regatta Toolbox) and improvements in the underlying permissioning structure at the club level, JSA will provide an overview of how the Clubspot platform is organized and accessed by each club.

Regatta Host - Event Set-up

- Participants will set up a Sample Regatta, stepping through each set-up screen with a discussion of important considerations and common mistakes as we go... such as organization of boat classes, entrance fees (per boat vs. per sailor), payment options, JSA registrations, etc.
- Regatta Host and Pre-Regatta Preparation
- How to Monitor registrations
- Under Age/Weight Permission Requests - Monitor & Approve requests
- Communication with Entrants
- Emergency/Medical Info Sheets for Entrants
- Duplicate Sail Numbers
- Large Fleet - Streamer Assignments

Regatta Host - Regatta Day

- Registration Check-in
- Produce scratch sheets for Race Committee
- On-Water Check-in
- Race Scoring Demonstration

8:45 Open Discussion

- Questions from the audience
- Usefulness of age / weight requirements.



Regatta Management

Powered by

CLUBSPOT

Regatta Management on Clubspot

- Regatta Toolbox has migrated to the Clubspot platform
- Clubspot offers full suite of services for club management
 - Club membership management, camp registration, website builder
 - Sailing program registration with JSA roster/waiver validation
- Migration to Clubspot brings upgraded features

CLUBSPOT

SOLUTIONS

ABOUT

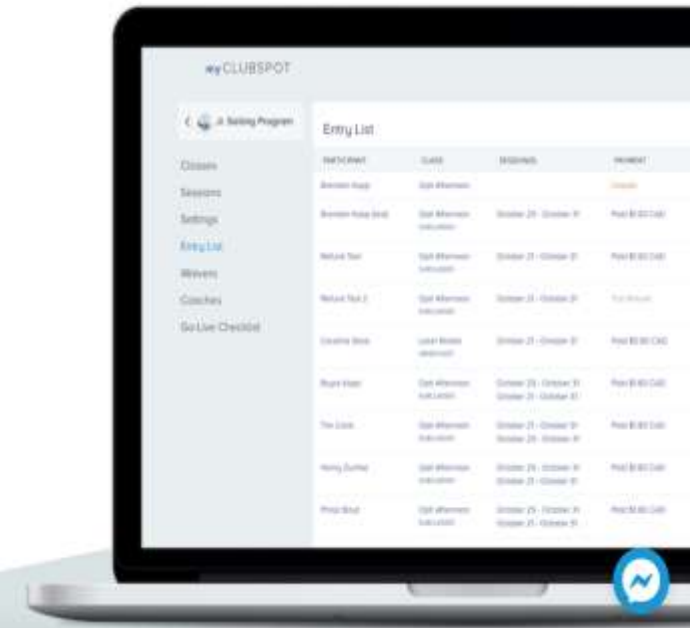
Dashboard

EXPLORE

Powerful tools for modern club management



Everything you need to manage your club's operations, in a single, modern platform.

SCHEDULE A DEMO



Clubspot Centered around the Club/Organization

The screenshot displays the Clubspot interface for a club named "Larchmont". On the left is a navigation sidebar with categories: Events, Membership, Website, Finance, Reservations, Account, Calendar, and Connect. Under "Events", there are sub-items: Camps, Regattas, and Series. The "Regattas" sub-item is selected. At the top of the main content area, there is a search bar labeled "Search regattas..." and a button labeled "+ NEW REGATTA". Below the search bar is a table titled "Regattas (beta)". The table has five columns: an index column, a "NAME" column with a dropdown arrow, a "START DATE" column with an up arrow, a "CREATED BY" column, and a "CREATED" column with a dropdown arrow. Two regattas are listed in the table. At the bottom right of the table area are two buttons: "PREVIOUS" and "NEXT".


	NAME	START DATE	CREATED BY	CREATED
1	 LYC Opti Day	July 18, 2019	Pier Witek	April 14 2019, 4:10 PM
2	 LYC Jr Race Week ~ 2019	July 15, 2019	Pier Witek	March 31 2019, 1:36 PM

Clubspot Centered around the Club/Organization

Larchmont ... ▾

- Events
- Membership
- Website
- Finance
- Reservations
- Account
 - Account Details
 - Your Team
 - Inbound Payments
 - Plan & Billing
 - Payment Methods
- Calendar
- Connect

Account Details

ACCOUNT BURGEE	CLUB / ASSOCIATION DETAILS	CONTACT INFO	
 (CLICK TO UPLOAD)	Organization Larchmont Yacht Club	Default email	Not provided
	Location Larchmont, NY	Camps email	Not provided
	Website Not provided	Regattas email	Not provided
		Membership email	Not provided

[edit](#)

Clubspot uses your contact emails as "from" addresses when sending communications on behalf of the club so that recipients can respond directly to you.

Clubspot Centered around the Club/Organization






Inbox (3,638) - smthomson88@gmail.com - Gmail

Larchmont ...

Search administrators...

+ NEW ADMIN

Administrators

	NAME	STATUS	ADDED BY	UPDATED
	Matt Wittick	Event admin ⓘ		April 29 2019, 4:44 PM
	Pier Witek	FULL ADMIN	Clubspot Team	March 31 2019, 1:20 PM
	Sheelagh Thomson	FULL ADMIN	Clubspot Team	January 11 2019, 12:22 PM
	Sheelagh Thomson	FULL ADMIN	Clubspot Team	January 11 2019, 12:21 PM
	Clubspot Team	FULL ADMIN		December 17 2018, 1:15 AM

+ new admin

Administrators listed here have club-level access. You can also share access to individual regattas, camps, or other events from the event dashboards.

Events

Membership

Website

Finance

Reservations

Account

- Account Details
- Your Team
- Inbound Payments
- Plan & Billing
- Payment Methods

Calendar

Connect



Club Level Access

Event Level Access

Full	Ability to access all content and control all permissions and create new events.
Regattas	Ability to create new events and manage existing ones. Ideal for Race Manager or Race Committee

Full	Ability to manage regatta, but not create new ones. Ideal for Event Chairman or PRO
Basic	Ability to manage entry list, waivers, emergency contacts, and safety information. Ideal for volunteers.
Scoring	Ability to score the event. Ideal for event scorer.

Camps	Ability to crew new events and manage existing ones. Ideal for Program Director.
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Full	Ability to manage camp, but not create new ones. Ideal for Head Coach.
Basic	Ability to view entry list, waivers, and emergency contact information. Ideal for Coaches.

Finance	Ability to access financial information and run reports for the account. Ideal for Controller.
Membership	Ability to access membership information and applications. Ideal for Membership Committee or Board of Directors.
Web	Ability to manage web builder content. Ideal for Communications Department or IT.

Clubspot Centered around the Club/Organization

The screenshot displays the Clubspot user interface. At the top, a browser tab shows 'Inbox (3,638) - smthomson68@gmail.com - Gmail'. The left sidebar contains navigation items: 'Larchmont ...' (with a dropdown arrow), 'Events', 'Membership', 'Website', 'Finance', 'Reservations', 'Account' (highlighted in blue), 'Account Details', 'Your Team', 'Inbound Payments', 'Plan & Billing', 'Payment Methods', 'Calendar', and 'Connect'. The main content area is divided into two sections. The first section, 'Payments account', features a blue button labeled 'ENABLE INBOUND PAYMENTS'. The second section, 'Payment methods', lists three options with toggle switches: 'CREDIT/DEBIT CARDS', 'BANK TRANSFER (ACH)', and 'MEMBER CHARGES'. A blue-bordered box at the bottom of the 'Payment methods' section contains the text: 'When you connect an inbound payments account (above) your club can immediately start receiving payments via credit/debit cards, ACH bank transfers, and Apple Pay.'

Inbox (3,638) - smthomson68@gmail.com - Gmail

Larchmont ...

Events

Membership

Website

Finance

Reservations

Account

Account Details

Your Team

Inbound Payments

Plan & Billing

Payment Methods

Calendar

Connect

Payments account

Clubspot makes it easy to collect online payments. We use [Stripe](#) to collect payments on your behalf, and we route funds directly into your club's payment account instantaneously.

ENABLE INBOUND PAYMENTS

Payment methods

CREDIT/DEBIT CARDS

BANK TRANSFER (ACH)

MEMBER CHARGES

When you connect an inbound payments account (above) your club can immediately start receiving payments via credit/debit cards, ACH bank transfers, and Apple Pay.

Regatta Hosts Will See Improved Features!

- Regatta Day Check-in
 - Faster Entry List Maneuverability
 - Entry list search function
 - No time consuming reloading of entry list
 - Expanded tracking information
 - Wristband scanning – Offline mode if Wifi signal is an issue
- Scoring Upgrades
 - Customized letter score rule assignment
 - Drag & drop boats within an entered finish list
 - Multi-Class finish lists now supported
- Financial Reporting Expanded
 - Stripe data connected to event data in easy to understand screen/reports

Clubspot Demonstration

- Regatta Set-up in Clubspot
- Regatta Day – Preparation & Check-in
- Regatta Day Scoring

Regatta Hosts – Early Preparation List

- **Establish Club Administrators in Clubspot**
- **Internet Connectivity** – Make a plan now for reliable web access
 - Club Wifi – Is there a strong, reliable signal where competitors will check in?
 - Portable Hotspots
 - Personal Phone or Tablet Hotspots
 - Volunteers with Laptops at Competitor check-in
- **Review Regatta Budget** – Consider registration system fees in setting Regatta Entrance Fee
 - Regatta Hosts net at least 95% of entry fees collected
- **Electronic Payment** - Coordinate with your club's controller about connecting Stripe account in Clubspot