

# **EVENT PLANNING**

## **POLICY AND PROCEDURE – 2 PAGES**

**Approved by board april 4, 2009**

CREATED ON 01/04/2009 1:23:00 PM  
REVISION NO. : 0

CREATED BY Am Shalom  
REVISION DATE: / /200x

### **Policy:**

For the purpose of clarity and to ensure proper communication between Committees in the organization of congregational events either social or fundraising and to help alleviate date overlap and confusion possibly resulting in the loss of potential income for the congregation, all social and fundraising events that involve income and expense must be preplanned in current year for next year with content and budgeting pre-approved by the Board.

#### **PRE-EVENT PLANNING POLICY**

All events, social and fundraising must be planned in advance for the coming year by the committees involved i.e. sisterhood, brotherhood, and social/fundraising. The responsibility for coordinating this planning meeting lies with the committee chairpersons.

- All events, social and fundraising, must be reviewed by the Board of Governors before planning begins.
- All events, social and fundraising, must have a **Pre-event Planning Income and Expense forms** or **PPIE form** completed outlining the purpose, type, advertising requirements and costs and projected income and expense associated with the event.
- The Chairperson will be responsible for completing the PPIE form, advertising requirements and associated costs, resulting in a total projected expense and revenue.
- All events, social and fundraising, must have a PPIE form ready prior to the first meeting in January of the new year and sent to the office to be sent to the Board members in advance prior to the board meeting for review.
- All event PPEI forms must be reviewed by Board members prior to the Board meeting and must be prepared to discuss the:
  - likelihood of success of the event,
  - value to congregation/community
  - return on time and money invested, cost to organize vs. income expected
- With the final result of an approval to go ahead or disapproval
  1. not viable or,
  2. Disapproval – fix and re-submit.
- All events must be approved by the Board of Governors at the first meeting of the year in January before any official planning takes place by the committees.
- All PPIE's, once approved at the Board meeting, must be signed at the Board meeting by at least one of the Board of Governors executive representing the Board of Governors. i.e. President, Vice President, Secretary or Treasurer
- All event RSVP payments will be the responsibility of the office administrator who, based on the RSVP paid list, will produce a paid list for use at the door, and will also arrange advertising per the approved PPEI's. type, timing and budget.

#### **POST EVENT WRAP UP POLICY**

- After the event has taken place, **Post-event Planning Actual Income and Expense form**, the **PPAIE** must be completed and sent to the office (copies) **within one week** of the end of the event for presentation at the next Board meeting.
- The Board of Governors will receive the PPAIE in advance of the Board meeting and will review and will be prepared to accept the actual revenue outcome of the event as approved on the PPIE for a social event or fundraiser or, if revenue does not break even minus (social) or does not meet the original projected revenue (fundraiser), will be expected to examine the event and try to determine why the event was not successful in bringing in the projected revenue or break even dollar per the PPEI, with a view to improving the planning process and outcome of future events of that type.
- Revenue/cash collected at the door **must not be used to pay suppliers**. All cash revenue must be given to the office the day after the event takes place along with the PPAIE form.
- Unless special arrangements in advance of the event are made by the Committee chair with the office,
- All suppliers must be advised by the Chairperson that, in order to get paid, they must produce on the night of the event, an invoice or paper backup for service rendered at the event. The invoice or paper backup must have their company name, address and phone number and their signature, in order to be paid.

## **EVENT PLANNING**

### **POLICY AND PROCEDURE – 2 PAGES**

**Approved by board april 4, 2009**

CREATED ON 01/04/2009 1:23:00 PM  
REVISION NO. : 0

CREATED BY Am Shalom  
REVISION DATE: / /200x

#### **PRE-EVENT PROCEDURES**

1. Committee chairpersons to meet in November or December of current year and plan out the coming year with **annual recurring events and new events with tentative dates or confirmed dates.**
2. Committee Chairpersons to complete and submit all PPEI forms to the office for scanning and sending, in advance, to the Board of Governors for review before the first meeting in January
3. Board members to review, in advance of the Board Meeting, the PPEI's for each event being proposed **with the end result of an approval to go ahead or not.**
4. Board Approved PPEI's (copies) must be forwarded to the office no later than one week after approval for review by the Administrator with regard to setting up advertising required, RSVP tracking, accepting payment for ticket sales and to include the event dates on the Outlook Calendar.
5. If there is any change in date, it is the responsibility of the Committee chairperson who needs to change the date to get in touch with other Committee chairs to discuss the change and the impact it may have on other events.
6. There should be open communication between Committee chairpersons to handle any change/cancellation etc in confirmed dates.
7. Committee Chairpersons will create flyers, and tickets. Office will assist if necessary.
8. Committee Chairpersons will be responsible for the distribution of flyers or arranging phone tree callers to market the event. The office will send out e-mails to media with flyer information, and will also arrange print advertising if the budget for print advertising has been approved.
9. RSVP phone in payments will be taken by credit card by the office, and an RSVP list for use at the door will be created.
10. Tickets - if there is a raffle, tickets will be numbered on both left side and right side, and will be set aside for pick up at the door. The tickets will be torn in half, with one half given to participant and second half put in draw box. If there is no raffle, no tickets will be issued. Admittance to the event will be according the Paid RSVP list provided by the office which will contain names, number of people, phone numbers, and whether they are a member or non member.
11. Ticket sales in advance - If actual tickets are to be sold in advance by members of the committee or congregation members or are being sent to another organization to sell on Committee's behalf, it will be the responsibility of the Chairperson to create numbered tickets, keep track of how many are sold, collect the cash for the tickets from those selling them, and be accountable to the office for all tickets sold prior to the event.
12. Cash float for cash box must be arranged in advance of event date so it is available on the evening of the event.
13. Any supplier requiring payment on the night of the event, will be paid by cheque, and must produce/provide an invoice or paper backup prior to the event, sent by fax to e-mail to the office, so that a cheque can be signed and ready.

#### **POST EVENT WRAP UP PROCEDURES**

1. All cash revenue collected at door, drink or food sales, must be accounted for and submitted to the office along with the Original RSVP list issued by the administrator to be used at the door for tacking, on the morning or day after the event has taken place.
2. Committee Chairperson to complete the PPAIE form and send to office or bring to office along with cash revenues received at the door
3. Office to send the PPAIE to the Board of Governors for review before the next Board Meeting.
4. Board will review the PPAIE in advance for discussion at the next Board Meeting.