

ACTIVITIES AND EVENTS PLANNING SUPPORT GUIDE



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 - ⇒ **PROCUREMENT LIFE CYCLE**
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ACTIVITIES & EVENT PLANNING GUIDE

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Calendar Date Selection & Announcement Request

Guidepost: In the spirit of excellence, our ministry calendar is created one year in advance for major events. Due to unforeseen conflicts, in some instances your date may need to be adjusted to promote maximum participation.

Calendar Requests – Should be Submitted On-line

- ⇒ At a minimum, calendar requests should be received in the office at 30-45 days prior to your event. For major conferences, this timeframe will need to be adjusted further out.
- ⇒ Requests for **rehearsals** and **event dates** must both be submitted to the office prior to the month of the event to allow for helps ministry partners to schedule the assistance within their monthly calendars.
- ⇒ Preferably, submit your calendar request and announcement request simultaneously. Please note that all events don't require announcement. As a result, the request for announcements must also be clearly communicated.

Announcement Requests

- ⇒ If you don't have the details of your event readily available at the time of the calendar request, your subsequent request for an announcement should be made at a minimum of 30-45 days of the event.
- ⇒ Due to the size of our ministry and the multiple events that occur simultaneously, the number of announcements that will run through media services at any given time fluctuates. As a result, your request for an announcement does not solidify that your announcement will run. It is important to create a marketing plan outside of church announcements such as word of mouth advertising, etc.
- ⇒ The number of times that an event announcement will typically run is 2 weeks prior to the event.
- ⇒ If your event will require registration, please identify all of the pertinent information that needs to be captured. Your ministry will need to identify a record keeping process for the registration information. This will be covered in the subsequent section entitled "Administrative Support – Registration".

Securing Helps Ministry Partners

Guidepost: Requests for assistance for rehearsals and event support must be received prior to the church posting of the ministry calendar, typically 30-45 days before the event.

- ⇒ Create your event agenda as soon as possible. Events Coordinator will contact and secure support for your event based on the contents of the event agenda.
- ⇒ In the attitude of demonstrating appreciation for helps partners who alter personal schedules to accommodate rehearsals, adherence to the allotted time for rehearsals will be maintained.
- ⇒ **It is inappropriate to schedule “call or impromptu rehearsals” without the permission of Bishop.**
- ⇒ Events Coordinator will work with you to identify what equipment is available for use.
- ⇒ Any items that are not already owned by the ministry would result in a budget change request that must be submitted to Bishop Robertson.
- ⇒ Within your planning, identify people within your ministry team to assist with the following areas:
 - 1) Set-up/Breakdown
 - 2) Offsite storage retrieval and replacement
 - 3) Restroom Clean-up
 - 4) Registration & Purchase Support
- ⇒ It is inappropriate to solicit persons who are not members to perform technical support or otherwise without approval from Administration.
- ⇒ Requests for the Décor Ministry must be submitted via on-line form submission; Any expense items must be included in the original budget. Please note (1) the ministry has a standard of visually acceptable items that can be displayed. (2) If warranted, the décor ministry will supplement/assist the individual ministry, however, physical resources from the hosting ministry must be identified.
- ⇒ Print/Copy requests for the copy center must be submitted through on-line submission 30 days in advance of when the items are needed. Visit the copy center page on the church website for instructions. An estimate of the amount allotted for print costs should also be included within the original event budget.

Registration

Guidepost: The preferred format for registrations is on-line.

Never should monies collected from members or guests be taken off of the property. All reconciliation must be done on the property on the day of receipt.

- ⇒ Administration will set-up the registration portal accessible from the announcements section of the website.
- ⇒ If there is a cost/fee associated with your event, an on-line processing fee should be included within your posted fees. Administration will inform you of the current rate.
- ⇒ Reports will be submitted in excel format to the ministry leader on Monday and Thursday of each week while registration is being done.
- ⇒ It is the ministry leader's responsibility to place the spreadsheet in their preferred design to meet the needs that they establish.
- ⇒ Identify a person who will maintain your internal records of registration.

Manual Registrations

- ⇒ If manual registrations are necessary and are taken on site the ministry leader must create and maintain a manual database for these records. A financial count and breakdown must be submitted to the office after each service.
- ⇒ The ministry leader will be contacted by Administration to schedule a 15 minute training session on the onsite process.

Procurement

Guidepost: In the spirit of excellence and fiduciary responsibility, our ministry prepares an annual and monthly budget. As a result, the approved budget for your event should be submitted in writing simultaneously with your notification to Administration that you have an approved event.

- ⇒ It is the responsibility of the Elder or delegated ministry leader to manage your event budget and ensure that all forms and receipts are turned in within a timely manner. The final complete reconciliation of the event should be within 1 week of the conclusion of the event.
- ⇒ Any change or overage to the original budget must be submitted to Bishop for approval prior to purchase.
- ⇒ All **unapproved expenditures** will not be reimbursed and should not be submitted within the final financial recap of the event.
- ⇒ Managing the event budget – It is a good practice to attempt to come in under projected budget. If you come in under budget, these funds should not be allocated to a unplanned expense without the consent of the budget approver.
- ⇒ Reconciliation – After the conclusion of your event, include within your event recap narrative, a budget to actual recap of the expenditures to the ministry leader.

Authorizing Purchases & Rentals

- ⇒ All requests for finances and purchases must be approved by the Elder of the ministry.
- ⇒ Utilize the standard Reimbursement/Pre-printed Check Request form that can be retrieved on-line. Please note that the hard copy of this form has three copies which allows you to retain a copy of your request as well as attach your purchase receipts.
- ⇒ When purchasing items for ministry purposes please utilize the tax exempt certificate which can be retrieved from the Financial Administrator.
- ⇒ Reimbursement/Pre-printed Check Request form should also be used for credit card purchase requests.
- ⇒ The recipient of the check request will be notified when the check is available for pick-up.
- ⇒ The initiator of credit card requests will be notified when the order has been placed.

Deliveries

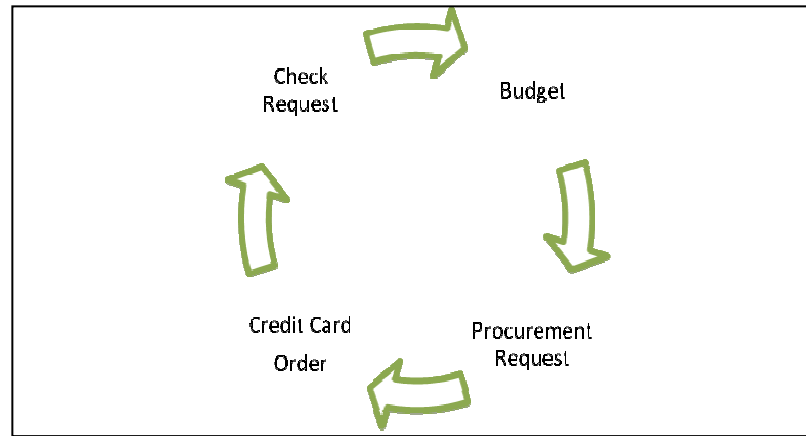
Shipments

- ⇒ When placing orders to be shipped to the ministry, be mindful of the office/ building schedule to ensure that shipments are not delivered after business hours – 9:00 a.m. 5:30 p.m. Monday – Thursday and 12pm on Fridays. No weekend shipments should be scheduled.
- ⇒ You will be notified when a shipped order has been delivered to the ministry.
- ⇒ You should quality check the ordered items to ensure that they meet the standards that you expected.

Rentals

- ⇒ Coordination of rental returns should be scheduled by the Helps Ministry event leader while consulting with Administration.
- ⇒ If payment is due on delivery, it is your responsibility to have requested the check prior to the day of delivery.

PROCUREMENT LIFE CYCLE



The procurement process is a life cycle that involves the following components:

- ⇒ **Budget** – An approved line item description of proposed expenses that are related to the execution of an event or project. A budget consists of all known expenses and a miscellaneous category for items that may come up once the event action plan commensurate. It is important to manage to the budget that has been approved. At the conclusion of the event, all receipts and procurement requests should be balanced at the ministry level before turning receipts into the administrative office. **In some cases your ministry leader may request a final approval of your budget 30 days prior to the event.**
- ⇒ **Procurement Request** – The request to get the items needed for your event is known as a procurement request. Utilize the **Reimbursement/Check Request Form**. Requests will generally be made for credit card purchases or check request purchases. Regardless of the method of purchase, receipts must be retrieved and the ministry's tax exempt status utilized when at all possible.
- ⇒ **Credit Card Order** – For on-line transactions, please utilize the Ministry Supply Order Form on the website. Located under Member Services/Forms
- ⇒ **Reconciliation** – Within one week of the event, all receipts should be turned into the Administrative Office along with the copy of the initial **Reimbursement/Check Request Form** (Yellow Copy). In some instances for larger events, you may need to utilize two forms to subcategorize purchases. When utilized properly, the form will allow you to easily see if you have remained within your budget for the event. The pink copy should be used by your ministry to plan future events.

Sample Budget Request Template

Approved Event Budget for [Event Name]				
Event Date: _____		Date Submitted: _____		
Projected Income	Type of Income (Itemize)	Income/Donation	Actual	Difference
	Mt. Gilead Sponsorship Seed			-
	Registration Projection			-
				-
TOTAL INCOME		-	-	-
EXPENSES				
Date Check Needed	Itemized/Detailed Expenses	Approved Amount	Actual Amount	Difference
	Door Prizes			-
	Decorations			-
				-
	Meals			
				-
				-
	Admin/Clerical			
	Printing			-
	Supplies			-
				-
	Marketing/Flyers			
	Flyers			-
				-
	Guest			
	Honorariums			-
	Hotel			-
	Gifts			-
	Travel			-
	Room Incidentals			-
	Driver Incidentals			-
				-
	Rentals			
				-
				-
	Miscellaneous Exp.			
	On Line Transaction Fees			-
				-
TOTAL EXPENSES		-	-	-
Total Profit/Loss				\$ -
Notes:				

Prepared by _____

Contact Info _____

Email _____ Phone _____

Date approved by Bishop: _____

NEXT STEP:
*****Complete Check/Credit Card Requests as needed.*****

Successful Event Tips

- ⇒ If mishaps occur, assume that the mishap that occurred was because of a lack of communication and not the intentions of your ministry partner.
- ⇒ Take each mishap as an opportunity to identify a solution to a problem that you can solve and participate in.
- ⇒ Embrace your event as an opportunity for all parties to learn more and grow more.
- ⇒ Follow-up on your emails with phone calls or through in person discussions.
- ⇒ Ask questions often
- ⇒ Reiterate your understanding of roles and responsibilities often
- ⇒ Always have plan “C” and team “E” in the wings, as things always come up.



Thank You for Serving With Us !