

Steps Event Planning Checklist

Name of Event: _____ Point Person: _____
Date(s) of Event: _____ Committee: _____
Total Time Reserved: _____ Home Phone: _____
Includes set up/tear down Cell Phone: _____
Event Start/End Times: _____ / _____ Email: _____

First Pres holds many events, programs and services during the course of a year. The effectiveness of these activities depends on advance planning, cooperation, and flexibility. This checklist was developed to guide you through the steps necessary to achieve an event that is organized, well-planned, and smooth-running.

A Word of Caution - These steps may require a lead-time of several months. Please work ahead of time to assure the approval and the success of your event.

Scheduling

Step 1: Getting an Event approved

Before an event can be planned, it needs to be approved by the appropriate groups:

- _____ Check with staff liaison about the proposed idea and have that person present idea at Wednesday staff meeting
- _____ Check availability of date(s) and time (including setup/tear down) with Cindy King in the Church Office.
- _____ Obtain approval from the appropriate committee
- _____ If event is a fundraiser, obtain approval from Financial Stewardship Committee
- _____ If event is a mission activity, obtain approval from the Mission Committee
- _____ Obtain approval from Session

Step 2: Scheduling an Event

Once the event has passed through the approval process, it can be added to the church calendar

- _____ **Once approval is obtained**, inform Cindy King in the Church Office

Planning

Step 3: Money

If the event involves money in any way (book sales, attendance fees, donations, cash boxes, etc.) please inform the Finance Office.

If you are requesting payment for speaker fees, reimbursements, travel expenses, etc.,

- _____ Turn in check requests to the Finance Office at least a week before payment is required
- _____ Submit expense reimbursements after the event including receipts

If you are collecting money at the event

- _____ Contact the Finance Office at least two weeks prior to the event if you will need a cash box with starting funds or the credit card reader
- _____ Recruit two people to count the proceeds and sign the tally sheet

Step 4: Collection of Items

- _____ Reserve collection baskets and Welcome Center space in the Church Office
- _____ Set up schedule to regularly remove items from baskets to prevent overflow

Step 5: Publicity

NEW! Send information for the bulletin, website, newsletter, etc., to publications@firstpresbyterian.org

Deadlines for the publicity vary from **two weeks to a month** before the event. Start planning early!

- _____ **FIRST! Meet with Linda Robinson, Office Manager, to coordinate and plan all publicity, including web-based, print, announcements and other marketing tools.** Linda will work with you to develop an event plan and schedule.

After a plan and schedule are approved, then:

- _____ Contact Lisa Hadrill to arrange web-based publicity
- _____ Contact Mary Jones to arrange print based publicity other than bulletins
- _____ Contact Linda Robinson to arrange announcements in the Sunday bulletin
- _____ Contact Rev. Dr. Fair to obtain permission for a Faith in Action announcement
- _____ Contact Rev. Melissa Anne Rogers to obtain permission for a Life in the Church announcement.
- _____ Contact Jane Kinzinger to reserve a Sunday to sponsor Coffee Hour

Step 6: Online and Church Office Sign Ups

Deadlines for sign ups vary from **two weeks to a month**.

- _____ Designate one person from your committee to track sign-ups
- _____ Arrange sign up sheets in Church Office and/or at the Welcome Center with Linda Robinson, Office Manager
- _____ For the “signify on the Friendship Pad” option, contact Rev. Melissa Anne Rogers
- _____ For a wufoo sign up with or without online payment, contact Lisa Hadrill

Step 7: Arrangements and Work Orders

Please contact Adrian Prundeanu, Facilities Manager to discuss any needs regarding room set up, AV or special equipment, coffee, food arrangements, etc. Work orders must be filled out and turned in **at least two weeks** before the event.

- _____ Contact Adrian Prundeanu, Facilities Manager to determine set up needs
- _____ Submit a work order at least two weeks before your event
- _____ Arrange set up and tear down volunteers if needed

Hosting the Event

Step 8: Photographs

- _____ We love to have photos of your event! While not a requirement, it is helpful to designate someone to take pictures of the event for inclusion on the web and in print publications. Please submit them to publications@firstpresbyterian.org.

Step 9: Evaluation

- _____ Set up process by which you will evaluate the success of your event
- _____ If this is an annual event, determine how you will pass on information for next year

Step 10: Thanking Contributors and Volunteers

- _____ Determine how you will thank volunteers and contributors
- _____ Contact Finance Office for a list of contributors