LifeStream Church of the Nazarene
Waldorf, Maryland

Event Planner Resource Kit

"So then, as we have opportunity, let us do good to everyone, and especially to those who are of the household of faith." – Galatians 6:10

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Introduction

First and foremost, thank you for offering your time and leadership for this event. Your service to the church community and dedication to the Lord is much appreciated. To help guide you to a successful and rewarding event outcome, we offer this event planner resource kit. Whether you are an experienced event planner or this is your first event, we hope you will find this package helpful for planning, funding, and executing this event.

The event planner resource kit provides useful tools and instructions to get you through the key three C's of successfully managing an event; ***communication, coordination, cooperation***. The kit will guide you through connecting with key resources in church leadership, setting up an event timeline, establishing practical accounting processes, getting the bills paid, putting together a viable communication plan, getting through the event, and then ending the project.

You have already completed the first step in the process by either accepting the responsibility to spearhead a planned event or by your desire to create a new opportunity to expand the church community through fellowship or through work in the harvest. So what's next?

Beginning with the End in Mind

Any event planned for the church community reflects the values and priorities of the church. To ensure that this happens, all church-sponsored events must have a church board sponsor to provide oversight for the event and mentoring for the event planners. You are encouraged to discuss the objectives and goals of this event with the pastoral staff or church leadership early in the process to make sure you are on the right track.

Left unchecked, the church calendar would soon fill with many events supporting many diverse ministries. Too many events that support too many programs will quickly fatigue the attention of the church community and will cloud the true, simple Christian message LifeStream Church to the Nazarene wishes to communicate. Therefore, you should prayerfully consider (along with consulting church leadership) how this event supports the simple ministry of the church.

You should consider the following:

- Does this event support LifeStream's missional priorities to:
  - Connect people with God?
  - Connect people with others in transformational communities?
  - Connect people with the world in service?
- Does this event provide a worthwhile return on investment based on:
  - Time? (yours, the participants, the staff)
  - Level of effort? (will this event have widespread appeal or will it only interest a small portion of the community)

  - Cost? (will this event create a financial burden on the participants or the church)
- Are there other competing events being planned, other church calendar considerations, or other seasonal events that may impact the success of your event?

If your event appears to meet the above criteria, you are now ready to get started. This kit contains tools for communication, planning, marketing, and accounting to help make this event rewarding, reasonably stress-free, and spiritually meaningful.

You may or may not need to use all of these tools, depending upon the scope and level of effort this event requires. To a novice event planner, these tools may appear to be bureaucratic and a bit burdensome in nature, but an experienced project manager will recognize the value of these tools to create a successful project plan. A small investment of time working these tools at the outset of event planning helps prevent broken communications, missed milestones, rework due to errors, and frustration as the project progresses.

We encourage you to use as many of these resources as possible to make your journey as smooth as possible. An “Event Planner’s Checklist” (appendix 1) is provided in this kit to help you keep track all of the steps necessary to complete the administrative requirements for this event.

This handbook and all of the tools outlined in the handbook are available in soft copy on a CD available in the church office, if you prefer.

Let’s begin with some necessary tools that will open the lines of *communication* with key members of the church leadership team.

Obtaining Church Board Sponsorship

As mentioned above, all events planned under the auspices of LifeStream Church of the Nazarene requires church board sponsorship. A form titled “Request for Church Board Sponsorship for a Special Event” (appendix 2) is provided for this purpose.

This tool is designed to ***communicate*** (the first element of the important 3 C’s) key information about the event to church leadership; to ***coordinate*** (the second element of the 3 C’s) necessary interaction between departmental leaders, pastoral staff, and the other stakeholders; and to instill a spirit of ***cooperation*** (the third element of the 3 C’s) among all key members and stakeholders to help make this event a success.

The key functions of the sponsor tool are to:

- Identify the intended church board sponsor and the church department of interest for the event
  - To help you identify the appropriate responsible board member, a roster of church board members and their areas of responsibility are included as a separate enclosure to this resource kit

- If you are unsure who needs to receive this request, consult with a member of the pastoral staff or a member of the church board
- If there is not a clearly apparent sponsorship candidate for this event, leave that section blank and the event will be discussed at the next scheduled church board meeting. A sponsor will be determined at that time if the board chooses to go forward with the event

- Establish the date(s) and length of the event
- Name and describe the event
    - Provide a brief description of the event, the expected benefits derived from the event, and how it fits within the church priorities
    - If there is a brochure or any other literature available for this event, attach it to the request
- Identify the event planner and the event planner contact information
- Identify the anticipated funding method
    - Normally, most special events are self-funded with in and out funds (all necessary funds are provided by the participants)
    - Some events such as special fellowship times (holiday meals, picnics, Faith Promise events, etc.) are either wholly or partially funded with church funds. This information can be obtained during your consultation with the pastoral staff or church board member. If this is a budgeted event, please include the appropriate budgetary line number.
- Provide a rough ball-park estimate of how many participants are expected and, if this is a self-funded event, how much each participant will be expected to pay. This rough estimate is for planning purposes only to communicate the rough order of magnitude of the event and there is no expectation of accuracy at this early stage.

After completing the request, hand the tool to the candidate board sponsor for the event. If there isn't an apparent sponsor, give the tool to a member of the pastoral staff. The church board normally meets the second Tuesday of each month, so plan on submitting the request near the beginning of the month if you want the request to be considered during that month's board meeting. Otherwise, the request will not be considered until the next board meeting. Time will be your worst adversary throughout the project, so the quicker you can get the ball rolling, the less stress there will be later in the process.

If you have already been working closely with church leadership, the request will be approved 99.99% of the time. There may be a rare occasion when circumstances change and your event may no longer fit within the church priorities and/or budget. If this is the case, your board sponsor will meet with you as soon as practical after the board meeting to let you know the details of why the event was disapproved. In any event, the sponsor will return a signed request to you as soon as possible after the board meeting.

Once you have board sponsorship, you are ready to begin your journey towards a rewarding and meaningful event. Your first challenge is to get the word out to your target audience.

Communication Plan

Congratulations, you have already completed the first and most important *communication* task by obtaining the support of church leadership. Now you have to devise a plan to ensure all potential participants know about the upcoming event and have ample time to engage participation in the event.

If this is a small event with a limited participant population to draw from, the communication (or marketing) plan is considerably less complicated than an event involving large pool of interested potential participants inside or outside of the church community, requiring travel arrangements, commercial venues, and coordination with outside agencies.

Because there are so many variables for a communication/marketing plan, there is no easy "one-size-fits-all" tool that can be created. The following tips will aid you in establishing a viable communication and marketing plan and will help you develop the "Five Rights" of a good marketing plan; getting the ***right*** information to the ***right*** people at the ***right*** time in the ***right*** manner at the ***right*** cost.

Consider and plan for:

- Communication with church leadership
    - Initial request for sponsorship and approval for the event (already done)
    - Intervals and methods of continued communication with the board sponsor (we recommend a conversation or a written communication (E-Mail) at least monthly; more frequently when necessary)
    - Communication of the financial plan with the Finance Team leader (the financial plan will be covered in detail later)
    - Closure and after-action reports
- Advertising and marketing – the level of effort required to market your event obviously is dependent upon the magnitude of the event and the range of the target audience. For example, a limited-interest NYI trip that will involve a small number of participants requires very little advertising or marketing as opposed to an event that includes the public in general for a larger special event (i.e. "Red, White, and Blue Sunday"). You should consider:
    - Is media advertising or reporting necessary?
        - If so, what type is needed, how often, and when?
    - Are handbills required?
        - Must they be printed/produced professionally?
        - How many are needed and when?
        - How will the cost be resolved?
    - Are half-sheet flyers needed for the church bulletin?

        - Who will design and produce them?
        - When must they be distributed?
    - Is a bulletin board posting desirable?
        - Who will coordinate and design?
        - When should it be posted?
    - Are oral presentations needed?
        - Who will provide the presentation and when?
        - How will interested participants make their intentions known?
    - Are there registration forms, permission slips, payment envelopes, or fact sheets available for potential participants?
        - How will the potential participants obtain these documents?

- Communication to vendors, lodging, or supporting organizations – consider the needs for lodging and transportation, registrations and registration fees, special or novelty clothing items, etc.
    - How and when are registration forms, permission slips, payments, or other documents submitted to supporting organizations?
    - When are lodging reservations and deposits due?
    - When are transportation reservations and payments due?
    - When should special clothing and/or event items be ordered?

- Communication with the finance team (the counters and the treasurer) – the finance plan will be discussed in more detail a little later.

Now that you have established the communication plan, preparing a schedule of event milestones and action items is your next challenge.

Milestone Planning and Timeline Management

Even the most experienced project managers find that preparing a written plan of action and milestones a bit tedious at the beginning of an endeavor, but eventually all find the written plan to be valuable roadmap of how and when to get things done on time, especially when your initial intent was only to drain the swamp, but you now find yourself up to your neck in alligators.

Of course, it will be up to you whether or not you wish to use these tools. However, if this is a major event or you have not had a lot of experience planning and conducting events, using these planning and timeline management tools can't hurt…

There are two tools provided for you within this kit; the "Milestone and Timeline Management Plan" (appendix 3) and a Gantt chart-styled "Event Timeline" (appendix 4) template. The first tool will provide a planning matrix that you use to identify and plot major events in preparing and executing this event. The second tool provides a mechanism to break tasks into smaller steps and also provides a graphic representation of the progress of the event.

Milestone and Timeline Management Plan (appendix 3)

The Milestone and Timeline Management Plan tool helps you determine the important milestones and the target dates for those milestones. The best way to use this tool is to first enter the date(s) of the event, then count the suggested amount of days before the event. The suggested intervals are based on an average sized and scoped event, based on the premise that even the smallest event requires at least 90 days of lead time. Beginning the timeline at least180 days before the event occurs should be your standard for larger scoped events, such as Work and Witness trips as an example. As stated before, time will become your worst adversary for this event.

Most standard steps are included on the form, but there are more than enough spaces to customize the steps required for your specific event.

Event Timeline (appendix 4)

Once you have determined the necessary milestones to reach success for your event, the Event Timeline tool provides a mechanism to break down tasks further, where necessary. Use this Gantt-styled chart to list the intermediate steps that are necessary to meet the major milestone. For example, if the milestone is to submit registration forms to an organizing group, you would want to establish a task breakdown that would include when to distribute the forms to participants, when to send out reminders, when participants need to return the registrations, and other included tasks.

You will find it helpful to enter the event name on the first line with the overall start date and the event date, so you will have a graphic summary where progress stands on the event; ahead of schedule (hooray!), on schedule (great!), or behind schedule (bummer). When adding the milestones and the subordinate tasks on the tool, enter the major milestone first, then the subordinate tasks in order, indented in from the major milestone. (See figure 1)

After determining and recording the task breakdowns on the Event Timeline tool, use the symbols that appear in the legend to plot milestones and task completion in the graphic portion of the chart. We have only represented a few of the most commonly used symbols in the legend, but those who routinely use Gantt charts for project management know there are many more symbols that you can use. The ones presented in the tool's legend should suffice for most church events. The symbols are:

- *Milestone:* a diamond placed on the graph to show the estimated completion date of the major milestone
- *Deadline:* an arrow placed on the graph that shows the date of the event
- *Progress Line:* a solid bar placed on the graph to show progress of a subtask as it progresses between the start and finish
- *Summary:* a solid bar with an inverted triangle at each end used to summarize the progress of all subtasks included within the milestone or the event line

An example of how to use these symbols is shown in figure 1.

Line Item	Task	Start Date	Due Date
1	The Big Event	1/7/2010	6/30/2010
2	Completed registration forms due to The Big Event Headquarters	4/15/2010	6/1/2010
2a	Distribute registration forms and instruction sheets to participants	4/15/2010	4/21/2010
2b	Send biweekly reminders to participants to return completed fomrs	4/21/2010	5/20/2010
2c	Completed registration forms due from participants	5/20/2010	5/25/2010
2d	Completed registration forms sent to The Big Event Headquarters	5/25/2010	5/25/21010
3	After action report due to board	7/1/2010	7/15/2010

Event Name: The Big Evebt

Date: Jun 31, 2010

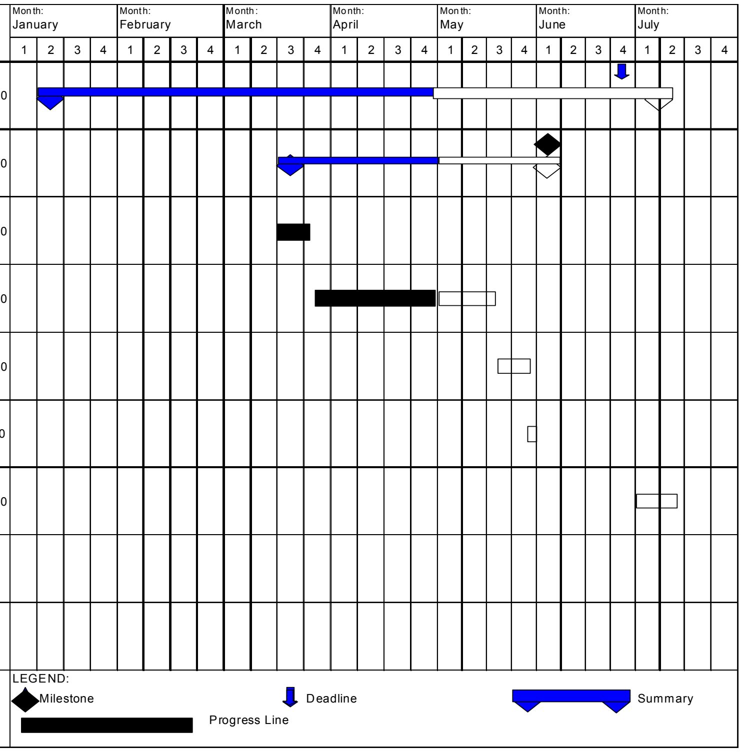

Figure 1

Now that you have a timeline planned and you have a good idea of the scope of this event, the next vital *communication* you need to make is with the financial team.

Event Accounting and Financial Plan

Although the financial plan appears to be a simple task (it is), the reasons and processes behind the plan are complex. An explanation of how LifeStream has set up its financial structure will show why a written financial plan is a crucial step in planning your event.

LifeStream's Financial Structure

LifeStream incorporates many checks and balances to manage its financial affairs. The general operating tenet governing the church's financial stewardship is that eliminating any systematic opportunities for impropriety eliminates impropriety or the appearances of impropriety. To achieve this goal, we have instituted the following checks and balances:

- Financial team roles:
  - The Financial Team Leader exercises general oversight over all aspects of the church's financial structure
  - The Recording Secretary exercises control over the accounts receivable aspects and has the only overall access to individual member's contribution records (for contributor's privacy)
  - The counter's count, record, and deposit all incoming funds

- The Church Treasurer exercises control over the budget process and accounts payable
- Church departmental leaders exercise acquisition and expense control over departmental matters and maintain departmental expenditures within predetermined annual budgetary limits

- No one individual has uncontrolled access to church funds
  - Two ushers are required to secure the offering in the drop safe
  - Two counters are required to count and record all offerings and other incoming funds (such as special events), prepare the bank deposit, and report the deposit to the treasurer
  - The treasurer reconciles bank deposits to the counter's records and resolves any discrepancies with the recording secretary
  - Church board team leaders obligate funds for their departments and approves invoices or contractual agreements for payment
  - The treasurer pays approved invoices and contractual agreements, monitors budgetary execution compared to incoming funds, and analyzes spending trends
  - The church board monitors the treasurer's activity through monthly treasurer's reports, accounting financial reports, and through an annual disinterested third-party bookkeeping review

That is the LifeStream's financial structure in a nutshell (if only it were that easy). As you can see, there are many financial entities that are concerned with the funds for your event. Without a financial plan for your event, it would be difficult to track your funds as they come in, especially if the counters are not aware that funds will be coming through their hands.

Without knowing specifically what special event funds are for, incoming funds are often applied by the counters to incorrect expense lines and the treasurer has no way to know that it is the wrong expense line. This leads to confusion and frustration when an event planner is expecting to have a certain amount of funds available, but the treasurer records do not show the funds on deposit. The burden then falls to the Recording Secretary to review past transactions to try to find the misapplied funds, and then correct the counter's report to balance the church books. There have been many times when a participant does not communicate that a contribution was for a special event and the misapplied funds cannot be reconciled.

We have included some *communication* and *coordination* tools in the resource kit to help you with event accounting and finances. The tools are:

- Special Event Financial Plan (appendix 5)
- Special Event Payment Envelope (appendix 6)
- Event Planner Accounting Tool (appendix 7)

Special Event Financial Plan (appendix 5)

The first financial tool is a *communication* tool to the finance team to establish *coordination* between the Recording Secretary, the counting team, and the church treasurer. The form is simple to complete and, for the most part, is self-explanatory. It communicates basic information about the event to the finance team:

- The event name and the date of the event
- The planner's name and contact information
- The name of the church board sponsor
- How the event is to be funded (self-funded, church funded, or a combination of the two)
- If church funding is expected, include the expense line number as was determined during the discussions with your board sponsor
- The approximate number of participants and estimated total funds expected to flow through the church's financial system
- When to expect that final payments are requested and when event closure is expected to occur

Provide the completed form to the Financial Team Leader as soon as practical but well before any funds are expected to come in and before any disbursements need to be made.

The Financial Team Leader will indicate which expense account line number(s) will be used, provide a copy of the completed form to the Church Recording Secretary to instruct the counter's on how to account for the funds for this event, and provide a copy to the Church Treasurer to instruct how accounts payable for this event will be handled. You will also receive a completed copy so you will have the expense account line numbers to provide the participants when they complete and submit the payments in the payment envelopes.

Special Event Payment Envelope (appendix 6)

As we have discussed previously, the church's financial system employs a series of checks and balances to make sure the funds entrusted for church use are not mishandled or lost (remember Uncle Billy losing the bank deposit in "It's a Wonderful Life"?) As protection for you, for the church, and for the participants, we don't want you to handle any funds; all funds must be handled through the church's financial structure of accounts receivable (counters) and accounts payable (Church Treasurer). But we also realize that you need a reliable feedback mechanism to know what funds have been received and for whom. A payment tool has been devised to complete this feedback loop.

Included in the resource kit is a "Special Event Payment Envelope" (appendix 6) for you to give to the participants to get their payments to the counters and for the counters to provide you (or your event bookkeeper) feedback on payments. We have provided 10 envelopes in the kit to start with, but you can get as many as you need from the church office.

The tool is again simple to use and is self-explanatory, for the most part. You may wish to complete the event name, the expense account information, and who will receive the empty envelope after the counter has recorded the payment before you give them to the participants. This way you will be sure that the money tracks correctly through the financial system.

You will provide the payment envelopes to participants and then provide instructions to the participants on the "Event Participant Factsheet" tool. We will talk more about this tool later.

The payment flows through the system as follows:

- The participant is instructed to submit the payment either via the offering plate or by delivering the payment to the church office
- The counters record the payment and then deposit the funds into the bank
- The event planner (or the designated event bookkeeper) receives the empty payment envelopes from the counter and records the transaction on the event bookkeeping tool
- The treasurer receives the counters' tally and credits the appropriate expense account line item as determined in the financial plan

Once your payments are safe in the bank and you have the records of the payments, you need a tool to keep track of the books. We have provided an "Event Planner Bookkeeping Tool" in the resource kit for this purpose.

Event Planner Bookkeeping Tool (appendix 7)

We have been alluding to the concept of an event bookkeeper other than the event planner. For most small events, the event planner should be able to keep the books without a problem. However, an event that includes many participants making multiple payments and multiple disbursements may be a little too much for one person to handle. You may want to enlist the help of a trusted deputy to handle the bookkeeping duties for the event.

No matter what you choose to do, a bookkeeping tool is available for your use. It is a simple spreadsheet with places to record participant payments, income from other sources, payments made, and the event fund balance. However, if you (or your deputy) prefer to use an electronic spreadsheet program such as Microsoft Excel, you should do so providing that the spreadsheet contains the key information contained in the bookkeeping tool.

Extra care should be taken to keep this tool up to date as this will be the only record of specific transactions for the event. You should plan on submitting the final copy of your bookkeeping tool as part of the after-action report to the board.

You've learned how to get the event funds into the bank, now we need to discuss how to get the bills paid.

How to Pay the Bills

There are two basic forms to get checks prepared for payments; "Authorization – Invoice Payment" and "Request for Reimbursement".

Authorization – Invoice Payment (appendix 8)

This is the green form that you will use to obtain checks to pay for your event expenses such as registration fees, transportation, special clothing, or any other authorized expense related to the event.

The form itself is simple to use. Provide the following information on the form:

- To whom the check should be made out
- The address that the check must be sent
- The invoice number (if available)
- The amount of the payment
- The date payment is requested
- Whether you want the check to mail out yourself or if you want the treasurer to mail out the payment with all the required forms

Request for Reimbursement (appendix 9)

This is the yellow form used to request reimbursement for out-of-pocket expenses. Again, this form is simple and self-explanatory.

Provide the following information on the form:

- Your name
- The amount to be reimbursed
- The date of the request
- The reason for the expense. Be sure to include the name of your event on the request to ensure that the proper expense account is debited
- Attach receipts to validate the expense total. Provide an explanation if receipts are not available

Payment Process

Just as the church leadership has created some financial checks and balances on the receiving end, there are a few at the sending end as well but we have tried to keep the bureaucracy to the absolute minimum. The bill-paying process is:

- Complete the authorization form and submit it to your board sponsor for payment authorization
    - ➢ Attach the invoice and, if you want the church treasurer to mail out the package, any registration forms and other documentation that must be submitted with the payment
    - ➢ Give at least two weeks lead time to get the payment through the system
- Your board sponsor will approve the payment and enter the expense account line number that was determined by the finance team leader (Note: if for some reason

your board sponsor is not available to approve your request within a reasonable time, the pastoral staff may approve the payment)

- The board sponsor forwards the request package to the Church Treasurer to write the check
  - Authorizations for payment received by Friday evening will be paid during the same weekend
  - If you need the check returned to you, make sure you provide instructions for the treasurer on how to get it back to you

Up until now, we have been primarily focused on *communicating* with church leadership and finance team members. Now it's time to focus on the participants.

Event Participant Factsheet (appendix 10)

Referring back to the "Five Rights" (getting the ***right*** information to the ***right*** people at the ***right*** time in the ***right*** manner at the ***right*** cost) *communication* early and often with your participants will lead your team to a successful and (hopefully) non-dramatic event.

An "Event Participant Factsheet" form (appendix 10) is provided in the resource kit for your use or you may develop your own handout for the event. Whichever route you choose to take, you need to relay the following information (when applicable) to your potential participants:

- A description of the event
- The dates and location of the event
- How much it will cost and if the costs are offset by church subsidies.
  - If subsidized, by how much?
- How to make payments using the special event payment envelopes
- How to contact you (the event planner)
- The documents that are required, when they are due, and how to get them to you
- A schedule of team meetings
- The transportation arrangements
- Any other unique information as it relates to this event

You will find it very advantageous to get this information to your target audience very early in the process. If there is prolonged period between the beginning of the planning process and the event, you may want to provide the handout at least twice; once at the beginning of the process and another right before the paperwork and payments are due. Your participants will appreciate the friendly reminder and you will appreciate not needing to nag participants to complete their responsibilities.

Now you are almost to the finish line. The paperwork is sent, the transportation is set, the event date arrives and all goes well. You only have one more thing to do, the event closure report to the board.

Closing Out the Event Process

The church board is interested in your event and wants to know how things went. We are able to improve our ministries and processes through the lessons learned by members of our church community. The board also has an oversight responsibility for any event sponsored by the church. We have provided an "Event After-Action Report" tool (appendix 11) for you to provide feedback to the board.

The tool communicates the following information:

- The demographics of the event
    - The name, dates, and location of the event
    - How many people participated
- A summary of the event
    - The event's intended purpose
    - Synopsis of the event
    - Subjective evaluation of the event's content
    - Was the event worthwhile and would you participate again?
- Lessons learned planning and leading this event
    - What went well planning the event
    - What could have been better and how
    - Was this resource kit helpful and what improvements could be made to make the kit more useful
- Event financial report – attach a copy of the "Event Planner Bookkeeping Tool" or a copy of the tool you used for event bookkeeping
    - If income does not equal expenses, explain how a shortage was mitigated or how an overage was resolved

You should submit your after-action report to your board sponsor within two weeks after the event while it is still fresh in your mind but definitely not later than 30 days after the event.

Your board sponsor will relay your report to the church board and they will discuss your event and note your lessons learned so we can improve the event-planning process.

The End

Now your event planner responsibilities are complete and your event was a success. We hope this has been a meaningful spiritual experience for you and we hope that this resource kit was helpful in assisting you to complete your objectives. We can't wait until you lead your next event!

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