

The Probus Club of Mountain View Event Planner Guideline

Details of a new event idea must be presented at a Social Committee meeting. The committee will determine if the event is viable and the best time to plan the event taking into consideration current events on the calendar and in the community.

Details required;

Present an outline of the event

- Anticipated fee or no fee for the event
- Minimum and/or maximum numbers required for sign-up
- Date of the event and a rain date (if weather sensitive)
- Frequency of the event, weekly, monthly, annual or one time
- Duration of the event, 2 hours, ½ day, full day, etc.
- Confirm our Probus Clubs Social Calendar and other community events don't conflict with event
- Special requirements, equipment or skills needed by guests
- Who will take the lead in organizing and planning
- Are volunteers required

Actions required for an approved **No Fee** event;

- Guests are only permitted to events that are not sold out
- Guests are only permitted to attend an event or meeting one time
- Prepare write-up for the newsletter that is due 7 days after the monthly social committee meetings held on the 3rd Tuesday of the month
- Speak at the General Probus meeting, if comfortable with that
- Complete the member sign-up at 1 or 2 general meetings
- If a member wants to attend an event and is unable to attend the meeting they can ask someone to do their sign-up
- Communicate to attendees by email if cancellation is necessary due to bad weather
- Be present at the event the day of or have a representative/s
- After an event is done the Social Committee will send a form to you by email that confirms the attendance numbers, should this be a repeat event and lessons learned
- We ask that you or have someone take pictures at your event to send to the Social Committee and Newsletter Editor to use for the newsletter and monthly general meeting presentations

Actions required for an approved **Fee** event;

- Guests are only permitted to events that are not sold out
- Guests are only permitted to attend an event or meeting one time
- Prepare write-up for the newsletter that is due 7 days after the monthly social committee meetings held on the 3rd Tuesday of the month
- Speak at the General Probud meeting, if comfortable with that
- An event should not be a profit or a loss to the Club. If expenses are uncertain a budget should be submitted
- Large events must have a financial budget prepared prior to the event to submit to the Management Team to ensure the event does not fall into a loss situation. i.e. the annual BBQ and Christmas Dinner
- Have a sign-up and collect cheques at 1 or 2 general meetings depending on numbers needed for the event
- Probud only accepts cheques as payment **NO CASH**. Cheques are to be made out to “The Probud Club Of Mountain View”
- When accepting a cheque make sure the date is correct (no post-dated), is it made out correctly and it is signed
- If a member is unable to attend a meeting to sign-up for an event they are responsible for getting a cheque to you before the event deadline to confirm their place. We are not responsible to chase payment if they don't pay, they don't play
- Submit a summary and cheques to the Club Treasurer once all of the cheques are collected to be deposited into the club bank account
- When the event final numbers have been confirmed with the venue or the member's cheque has been cashed the money will not be refunded to the member. They are free to find a club member to take their place
- Find out when and the method of payment for the event. Confirm what name should be on the cheque for the Club Treasurer.
- Ask the venue if you need to pay for last minute non-attendance at the event
- If a cheque is required from the treasurer ask a week in advance of the payment deadline since two signatures are required for cheques
- Some venues will accept credit card payment
- Complete a Financial Budget form and submit to the Club Treasurer when the event is done
- Request a cheque for payment of any expenses by submitting an Expense Report with all your receipts to the Club Treasurer.

- If you can't pay the venue by cheque, you can charge to your credit card and have the cheque made out to you. You just include the receipt on the Financial Summary form
- Communicate to attendees by email if cancellation is necessary due to bad weather
- Be present at the event the day of or have a representative/s
- After an is done the Social Committee will send a form to you by email that confirms the attendance numbers, should this be a repeat event and lessons learned
- We ask that you or someone take pictures at your event to send to the Social Committee and Newsletter Editor to use for the newsletter and monthly general meeting presentations

Social Committee provides;

- A mentor for you if this is your first event
- Announces you to speak at the general meeting
- Event sign for the general meeting sign-up table
- Event sign-up sheet (Fee or No Fee) and pen (form attached)
- Envelope for cheques (if necessary)
- Financial Summary form for Club Treasurer (form attached)
- Expense Claim Report for Club Treasurer (form attached)

EVENT: _____

Date: _____

Location: _____

CONTACT:

Email: _____

Telephone: _____

MEMBERS ONLY

	NAME	E-Mail Address
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EVENT: _____

Date: _____

Location: _____

CONTACT:

Email: _____

Telephone: _____

SORRY, NO REFUNDS & MEMBERS ONLY

	NAME	E-MAIL ADDRESS		PAID \$0.00 PP
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2				
3				
4				
5				
6				
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13				

	NAME	E-MAIL ADDRESS		PAID \$0.00 PP
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32		WAITING LIST		
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35				

Expense Claims

Submitted

By: _____

Date

Submitted: _____

Date of Receipt	Reason For Expense	Amount	Comments
TOTAL		\$0.00	

NOTE: PLEASE GIVE THE CLUB TREASURER AT LEAST ONE WEEK NOTICE PRIOR TO NEEDING A CHEQUE

PROBUS of MOUNTAIN VIEW
Social Event Financial Recap

Name of Event		Comments
Date of Event		
Event Co-Ordinators		
<u>Revenue</u>	# of participants	
	Price/Person	
	TOTAL	
<u>Expenses</u>	Location Rental	
	Food	
	Prizes	
	Decorations	
	Activities	
	Snacks	
	Tips	
	Misc.	
	TOTAL	
	Gain/Loss	