

The Probus Club of Mountain View Event Planner Guide Oct 25, 2016

Details of a new event idea must be presented to a Social Committee Chair or at a Social Committee meeting. The Social Committee will discuss the event and review 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, e.g., weekly, monthly, annual or one time
- Duration of the event, e.g. 2 hours, ½ day, full day
- Confirm our Probus Club's Social Calendar and other community events don't conflict with the event
- Special requirements, equipment or skills needed by attendees
- 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 the write-up for the Probus website, newsletter, and the Social Committee Co Chair that is due 6 days after the monthly Social Committee meeting
- Speak at the General Probus meeting, if comfortable with that
- Complete the member sign-up at 1 or 2 general meetings
- Create a waiting list once the event is full, to allow additional members a chance to attend if a member cancels
- If a member wants to attend an event and cannot attend the meeting they can ask someone to do their sign-up
- As a courtesy an email reminder is sent out to attendees a few days prior to the event
- An email must be sent if cancellation is necessary due to bad weather
- Be present at the event the day of or have a representative/s
- Prior to an event the Social Committee will email an Event Summary form to be completed. The information assists the Social Committee in the planning of future events

- We ask that you or a representative take pictures at your event and send them to the Social Committee, Webmaster and Club Photographer

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 the write-up for the Probus website, newsletter, and Social Committee Co Chair that is due 6 days after the monthly Social Committee meeting
- Speak at the General Probus 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 for submission to the Management Committee for approval. This is to ensure the financial risk of the event is acceptable. Eg, the annual BBQ and Christmas Dinner and Dance
- Have sign-up and collect cheques at (minimum) 2 general meetings
- Create a waiting list once the event is full, to allow additional members a chance to attend if a member cancels
- Probus only accepts cheques as payment. NO CASH. Cheques are to be made out to "The Probus Club Of Mountain View"
- When accepting a cheque make sure the date is correct, it is made out correctly and that it is signed
- If a member is unable to attend a meeting to sign-up for an event they may make arrangements to sign-up and deliver the payment to hold their place
- 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 a member's cheque has been cashed the money will not be refunded. 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
- Some venues will accept credit card payment
- Request a cheque for payment of any expenses by submitting an Expense Report with all your receipts to the Club Treasurer
- Complete a Financial Summary form and submit to the Club Treasurer when the event is done
- As a courtesy an email reminder is sent out a few days prior to the event
- An email must be sent if cancellation is necessary due to bad weather

- Be present at the event the day of or have a representative/s
- Prior to an event the Social Committee will email an Event Summary form to be completed. The information assists the Social Committee in the planning of future events
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Social Committee provides:

- A mentor for you if this is your first event
- Event Planner Guide
- Guidance as needed
- Event Leader Package includes all items required for General Meeting sign up
- Announces you to speak at the general meeting
- Event table sign for the general meeting sign-up table
- Event sign-up sheet (Fee or No Fee) and pen (example attached)
- Financial Summary form for Club Treasurer (example attached)

SIGN UP

EVENT: _____

Date: _____

Location: _____

CONTACT:

Email: _____

Telephone: _____

MEMBERS ONLY

	NAME	E-Mail Address
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31		WAITING LIST
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33		
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36		
37		

SIGN UP

EVENT: _____

Date: _____

Location: _____

CONTACT:

Email: _____

Telephone: _____

SORRY, NO REFUNDS & MEMBERS ONLY

	NAME	E-MAIL ADDRESS		PAID \$0.00 PP
1				
2				
3				
4				
5				
6				
7				
8				
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	NAME	E-MAIL ADDRESS		PAID \$0.00 PP
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30		WAITING LIST		
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PROBUS CLUB OF MOUNTAIN VIEW

Social Event Financial Summary

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	

THE PROBUS CLUB OF MOUNTAIN VIEW

NEW EVENT DETAIL FORM

Name of Event	
Location	
Date of Event/Rain Date	
Event Co-ordinator	
#of participants	
Price / Person	
Details	
Extra Comments	

THE PROBUS CLUB OF MOUNTAIN VIEW

Social Event Summary Report

Name of Event	
Location	
Date of Event	
Event Co-ordinator	
#of participants	
Price / Person	
Success of Event (Repeat)	
Lessons Learned	

***** PLEASE ATTACH AND SEND YOUR EVENT PHOTOS TO THE SOCIAL COMMITTEE CO-CHAIRS**

THE PROBUS CLUB OF MOUNTAIN VIEW
Waiver of Liability & Assumption of Risk

I acknowledge that this activity of The Probud Club Of Mountain View in which I am participating involves risks which are beyond the control of the club. Notwithstanding the acknowledgement of such risks, I hereby release The Probud Club of Mountain View, its contractors, employees, volunteers, agents assigns and executors from all claims for damage however so arising as a result of my participation in this or any other activity organized by the Club. I agree to pay the cost of any emergency evacuation of my person or belongings that may be necessary. I affirm that I am aware of the nature of the activity, its approximate length, duration and degree of difficulty and that I am properly equipped and physically able to participate. I have no medical or other condition which might preclude my participation. I agree to follow the directions of the leader.

Leader: _____ Area of _____ Date: _____

1	SIGNATURE	PRINT NAME	PHONE	EMERGENCY CONTACT	PHONE
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