

**COASTLANDS PRESBYTERY EVENT PLANNING GUIDELINES**

These guidelines have been developed in order to achieve a successful and well-planned event. The timeline used in the guidelines is to avoid any last-minutes glitches in the event.

NAME OF EVENT \_\_\_\_\_

HOST/FACILITATOR/COMMITTEE \_\_\_\_\_  
(include contact information)

TIMES(S) & DATE(S) OF EVENT \_\_\_\_\_

PHYSICAL LOCATION (IF ANY) \_\_\_\_\_

ZOOM LINK \_\_\_\_\_

TARGETED AUDIENCE/ATTENDEES \_\_\_\_\_

PURPOSE OF EVENT \_\_\_\_\_

GUEST/KEYNOTE SPEAKER(S) \_\_\_\_\_

HONORARIUM(S)  
Name(s) and Amounts \_\_\_\_\_

CHECK/PAYMENT NEEDED  
(the request must be received by the bookkeeper 2 weeks prior to the date check is required)

- 1) Immediately – specify where to be mailed and to whom it should be made out below \_\_\_\_\_
- 2) Day of event \_\_\_\_\_

SPECIAL INSTRUCTIONS FOR CHECK/PAYMENT \_\_\_\_\_

SUPPLIES NEEDED FOR EVENT (PowerPoint slides, videos, handouts, etc.) \_\_\_\_\_

REFRESHMENTS NEEDED \_\_\_\_\_

SPECIAL NEEDS (translator, sign language interpreter) \_\_\_\_\_

COMMUNICATIONS (Flyer, Presbytery website, e-blast, Facebook ) \_\_\_\_\_

Contact Marie at [info@coastlandspresbytery.org](mailto:info@coastlandspresbytery.org) or Ilene at [admin@coastlandspresbytery.org](mailto:admin@coastlandspresbytery.org) for information on publicity/communications.

## SUGGESTED TIMELINE AND PREPARATIONS

- \* AT LEAST 6 weeks before event - Arrange speaker and program
  - Request a "Save the Date" for Marie to send out and Ilene to post on website and Facebook
- \* Decide if there is a cost for attendees. If so, who will collect the fee and how?
- \* Do you require registration beforehand? If so, will the Presbytery assist in that or will it be done by planners?
- \* If this will be a Zoom event, who will open the meeting, be the host, man the dashboard and do the screen-sharing?
- \* After details are set, request publicity from Marie and Ilene. The event flyer should go out ASAP.
  - Begin obtaining the supplies needed. Keep receipts for reimbursement if applicable.
  - Order food if the event will be catered. Keep receipts for reimbursement if applicable.
- \* Fulfill speaker's needs.
- \* Request honorarium (the request must be received by the Presbytery bookkeeper 2 weeks prior to the date check is required).
- \* Ensure that attendees are informed about day, date, time, and any expectations of them

### POST-EVENT

- \* Write note of thanks to speaker.
- \* Make notes about pros and cons of event.
- \* Send out to attendees a survey about event.
- \* Request reimbursement for expenses related to event. Go to <https://coastlandspresbytery.org/resources> for form.

**Payment for keynote and any others requiring compensation, to be made from the committee requesting, not the presbytery. If the event is cancelled less than 48 hours beforehand, committee must be ready to remit full compensation for keynote/presenter.**

**PRESBYTERY OF THE COASTLANDS  
IN-PERSON EVENT PLANNER**

EVENT NAME \_\_\_\_\_

LOCATION OF EVENT \_\_\_\_\_

WILL THERE BE A REGISTRATION TABLE? \_\_\_\_\_ YES \_\_\_\_\_ NO

WILL A FEE BE COLLECTED AT THE DOOR? \_\_\_\_\_ YES \_\_\_\_\_ NO

ARE WALK-INS WELCOME OR IS PRE-REGISTRATION REQUIRED?

\_\_\_\_\_  
\_\_\_\_\_

WILL NAME TAGS BE GIVEN TO ATTENDEES? \_\_\_\_\_ YES \_\_\_\_\_ NO

DO ATTENDEES NEED A MAP OF THE LOCATION? \_\_\_\_\_ YES \_\_\_\_\_ NO

DO ATTENDEES NEED PARKING INSTRUCTIONS? \_\_\_\_\_ YES \_\_\_\_\_ NO

REFRESHMENTS TO BE PROVIDED (please include how the refreshment supplies will be obtained) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

FURNITURE REQUIRED (podium, tables, chairs) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 1) Make sure venue has Wi-Fi
- 2) Prepare signage to direct attendees
- 3) If there is a registration table, make sure you have the registration list or a sign-up sheet to collect attendees' contact info
- 4) Have name tags at registration table if so desired.
- 5) Ensure that there are enough handouts (if any) for all attendees.

**PRESBYTERY OF THE COASTLANDS  
EVENT SPEAKER FORM**

SPEAKER NAME \_\_\_\_\_

TITLE/SPECIALTY \_\_\_\_\_

\_\_\_\_\_

ORGANIZATION AFFILIATION \_\_\_\_\_

\_\_\_\_\_

PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

MAILING ADDRESS (if payment is to be mailed) \_\_\_\_\_

\_\_\_\_\_

EVENT TITLE, DATE AND TIME \_\_\_\_\_

\_\_\_\_\_

TOPIC/PRESENTATION SUMMARY \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

EVENT REQUIREMENTS (Handouts, projector and screen, etc.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

HONORARIUM REQUESTED: \_\_\_\_\_ YES \_\_\_\_\_ NO

(this must be submitted two weeks before due)

If yes, amount - \$ \_\_\_\_\_

Instructions for payment of honorarium \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

SPEAKER SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

PRESBYTERY OF THE COASTLANDS  
PAYMENT REQUEST

PAY TO: \_\_\_\_\_ Phone: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_ Email: \_\_\_\_\_

Note: For payments to individuals for services in excess of \$600, completed **Form W-9** is required **prior** to issuance of check.

INVOICE # \_\_\_\_\_ **AMOUNT \$** \_\_\_\_\_

**DUE DATE** \_\_\_\_\_ **INVOICE DATE** \_\_\_\_\_

For Memo on Check (35 character limit) \_\_\_\_\_

EXPLANATION \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

SPECIAL INSTRUCTIONS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

	Account number		
<b>CHARGE TO</b>	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	Total	\$ _____	

**DATE SUBMITTED** \_\_\_\_\_

\_\_\_\_\_  
**APPROVER**

\_\_\_\_\_  
Authorized signature if check is for self

Please sign electronically or sign and scan whenever possible. Person requesting reimbursement should sign and have additional authorized person sign as well.

In order for payments to be made, invoices and supporting receipts must be submitted – please scan and attach to pdf whenever possible. Credit card receipts and other expense reimbursement receipts should be clearly documented in accordance with Presbytery expense reimbursement policy.