



Elk Lodge #9 Event Proposal & Reporting Form

Whenever possible... Please allow 4 weeks for Event approval

(Two regularly scheduled Lodge Meetings are required)



Title of Event: _____

Host Committee: _____

Main Contact: _____ Phone Number: _____

Email: _____

Date of Event: _____ Times for Event: _____

Budget to be Proposed to Floor: _____ Estimated Volunteer Hours: _____

To be completed by House Committee:

Hall Reservation proposed to BOD: ___/___/___ Date Floor Proposal/Approval: ___/___/___

To be completed by office:

Date budget approved: ___/___/___ Approved Budget: \$_____ Day of expenses: \$_____

Pre-Event Logistics & Procedures:

- Is this event on-site? Yes No
- Will you need to reserve the hall? Yes No
- Will a key(s) be needed for day of sales? Yes No
- Is an online store item requested? Yes No
- Event fee(s)/amount(s) \$ _____
- Is this a pre-pay event? Yes No
- Is attendance limited? If yes, max #: _____ Yes No
- Is there a cut-off date for sign-ups? Yes No
If yes, what is the date: _____
- Are tickets/reservations sold in advance? Yes No
If yes, Office Staff will prepare an event in Tock
- Is a Sign-in sheet needed for day of? Yes No
- Will Raffle tickets or 50/50 be sold? Yes No
What will the cost/ticket be: _____
Office will prepare a Cash bag(s)
- Will payment of 'Day of Expenses' requested? (Catering, DJ, Band, etc.) Yes No
If yes, Office will prepare reimbursement voucher for Floor approval - process detailed in #2 on page 2
- Will you need the lodge open early for set-up? Yes No
If yes, is staff needed for early for service? Yes No
If yes, what time: _____
- Estimated number of attendees: _____
- Does the event necessitate a non-smoking request? Yes No

**** Your committee is responsible for proposing budget items on the floor ****

**** The House Committee will propose all room reservations on the floor ****

Methods Expense Disbursements:

- The Lodge credit card and tax-exempt letter are to be used for purchases directly related to the event. The card and tax letter are available from the office. Return card and receipts promptly;
- Retain and turn in ALL receipts for expenditures related to the event for which reimbursement will be requested;
- Payment of 'Day of Expenses' (*catering, band, DJ, etc.*) are NOT to be paid out of 50/50 or other cash collected the day of event;
- To request check for 'Day of Expenses':
 1. Following 1ST approval of Event and 'Day of Expenses', Host Committee contact to advise Office immediately that a reimbursement voucher is requested;
 - Name of Payee and amount due to be emailed to elkslodge9@yahoo.com;
 2. Office will prepare voucher for approval (2ND) by Lodge floor at next regularly scheduled meeting authorizing check preparation;
 3. Once voucher is approved, Office will prepare check for signature and advise Committee head how/where to retrieve check for day of payment;
- Any other special request/needs, please let the office know.

1. Public Relations Committee Approval

- Once approved by Lodge floor, send pg. 1 of Event Proposal by email to elkslodgenine@gmail.com.
 - Subject: "*Event – Your Committee Name*";
 - Body: Any details you need included on flyers, calendar, online store, etc. as well as how any "net proceeds" or "percentage of proceeds" will be used;
- Event will be added to Lodge calendar and membership advised;
- PR Committee will work with you to create any flyers you need;
- Once approved, the Communications Committee will print & post flyers;
- ***Unauthorized flyers will be removed.***

Post-Event Logistics:

1. Report on Event is required by Host Committee at the next regularly scheduled Lodge Meeting (attendance, financials, etc.)
 - The 'Recording Charitable Programs and Events' details what, why and how the event should be document.
 - Use the 'Charitable Data Sheet' report to collect and document Elk participation, attendance and financial status of the event
 - The 'Charitable Data Sheet' will be submitted to the Lodge Secretary following report to the Lodge Floor.
2. Expense reimbursement for events will not be authorized if above event process and documentation is not followed.
3. Expense reimbursements for events from cash proceeds of the event are strictly prohibited.
4. All collected funds resulting from Event activities (raffle, 50/50, tickets, items sold, etc.) must be turned into Lodge on the Event day
5. Prepare basic Event Profit & Loss detailing Total Income and Sources, Total Expenses, Net Proceeds. Please notate any Floor approved check requests for event beneficiaries.

Process Summary:

- Step 1 – Complete and use Pg.1 of Event Proposal to inform the office and House Committee of your proposed event four weeks prior to event date whenever possible.
- Step 2 – House Committee proposes room “rental” on lodge floor. (approved or rejected)
- Step 3 – Your Committee proposes budget for the event on lodge floor. (approved or rejected)
- Step 4 – After floor approval, Committee sends email to elkslodgenine@gmail.com with subject line “Event – Your Committee Name” and attach completed page 1 of Event Proposal along with all pertinent information needed to create flyers and add event to website/calendar/happenings;
- Step 5 – Collaborate with PR Committee on the flyer they are creating for you.
- Step 6 – Event held.
- Step 7 – Recap event at next regularly scheduled Lodge meeting and file charitable data sheet report with Lodge Secretary.