

# EVENT PLANNING

## Overview

The key elements to planning an event include:

- If contracts are required and not yet finalized, get them early so they can be reviewed, amended and finalized with appropriate signatures and payments
- Recruit co-chairs and sub-committee chairs and delegate responsibilities
- Review last year's event notes to understand budget and to minimize surprises
- If BSM is the location of your event, connect early with the Maintenance and Events Coordinator to discuss details
- Get [Marcomm](#) involved early with publicity and communications strategy
- Determine volunteer needs, use Sign Up Genius
- Send all SUG info and page updates to website coordinator to update your event page
- Prepare a final report within a month of the event, send thank you notes, and update summary documents for the next year

### Kick-off Meeting

Hold a kick off meeting with the following attendees well in advance of the event:

- Event chair(s)
- PA Board Chair and/or Co-chair (Resources)
- PA Treasurer (optional, if needed)

### Wrap Up Meeting

A wrap up meeting should be held shortly after the close of the event to review results of the event with the PA Board representative and others. **A final report must be completed within a month of the event and the event summary details should be updated for the next year's event chairs.**

### Other things to know:

The Parent Association closet is stocked with decorations, paper products, and stationary and office supplies for your use. In addition, there are table settings and supplies in the large closet in the Commons. Please check there before purchasing any supplies or decorations.

## Event Final Report Template

Date:

Event Name:

Chair Names and Email Addresses

Dates and Deadlines

Contract

Marketing Needs

Registration-Sign Up and Reporting

Budget

Total Income--details

Total Expenses--details

Net Income

Committee Members

Responsibilities

Sub-Committees

Sign Up Genius

Equipment Needed

Contracts

Communication Strategy

Include copies of marketing materials

Photos of Event--should be added to Photo Bucket

Evaluation

What went right?

What would consider changing?

Event Final Report including Event Timeline detailing the dates that all duties must be completed

## MARKETING & COMMUNICATIONS

It is important to only have ONE point of contact from the event committee with Marcomm for each event. Scheduling can be coordinated using the [marcomm@bsmschool.org](mailto:marcomm@bsmschool.org) email address. They will help with creative work if desired, pricing, and timelines of all electronic and printed materials.

### Available Forms of Communication:

- BSM website
  - Event web page – send event info to website coordinator as soon as plans are finalized
  - BSM web articles
- PA Mail Chimp Emails (must be scheduled in advance with PA Vice President)
  - Email to parents or specific group
  - E-blast (emergency call for volunteers or registration information)
- Knightly News
- Alumni & BSM Facebook posts
- Alumni Newsletter
- Crown and Shield Magazine
- BSM Facebook and Twitter pages
- Printed materials, design and production (require P.A. Board member approval prior to printing)
  - Posters, easels and sandwich boards (front entrance way and drop off circle)
  - Order forms
  - Flyers on lockers and hallways
- Electronic signage outside
- Electronic signage inside
- Knight Errant article-print/online
- Junior High Activities Committee Meeting
- PA Hallway display case (coordinate with the PA secretary for event schedule)
- If community wide event:  
Flyers, yard signs, Exterior banner on west wall of school, event-press news releases (parish bulletins, feeder school newsletters, online media (Yelp, Craigslist), community newspapers (Catholic Spirit).

### Print

Copy machines at BSM -- Parent Association code is **861**

Copy Center email -- [copycenter@bsmschool.org](mailto:copycenter@bsmschool.org)

All 8x11 copying should be done through the copy center at BSM.

All larger size printing should be done through Office Depot.

### **Final Review and Approval Procedures**

Before printing any materials or distributing any communications outside your committee, all materials should be reviewed at a minimum by:

- BSM Marketing & Communications Department
- Your PA Board Chair (usually Ways & Means, Social Programs or Faith and Wellness Chair)
- PA President or Vice President
- PA Treasurer (only forms requiring monetary payment)

### **Posters/Flyers**

Posters are an inexpensive way to communicate with the students, faculty and parents. Here are guidelines for using posters and signs within the school:

- Signs need to have an approval signature of the Senior High Asst. Principal, before they are hung.
- Signs need to be hung with sticky adhesive rather than any type of tape. The Senior High Attendance office has a supply of this adhesive.
- Signs can be hung in hallways and the Commons.
- Signs in the main lobby can only be hung on the pillars
- Signs cannot be hung on the walls near the Chapel.

### **Digital Signage**

Work with Marcomm to include event details on the digital signs hung in the Main Lobby, Commons and the Haben Center. Email [Jkoski@bsmschool.org](mailto:Jkoski@bsmschool.org) for electronic sign outside of the Haben.

## **FINANCIAL INFORMATION**

Budgeting, Reimbursements, Contracts

### **General**

The Parent Association Treasurer will coordinate all financial arrangements surrounding your event. **All questions should be directed to the PA Treasurer, not the BSM Finance Department.** It is the policy of the Parent Association that all events are self-supporting and fund themselves.

### Contracts

- **Any contract over \$5,000** needs the BSM President approval and will be obtained by the PA President. Please allow two weeks for the approval process.
- **Any commitment over \$500**, must be approved by the PA President in advance. Your PA Board chair (i.e. Social Programs, Ways & Means) must forward the contract to the PA President.

- Please submit contract approvals with a comparison of the current contract terms vs. the prior year. (i.e. \$25/person vs. \$24/person, increased service charge for delivering).
- Provide a copy of all approved/final contracts to PA President, Treasurer and board chair to keep on file to use as a reference or guideline for financial commitments and timeline.

Request a check from the Parent Association Treasurer for the deposit amount after the contract has been approved, if required

#### Check Requests/ Reimbursements

Submit expenses for the event to the PA Treasurer as incurred, but no later than 30 days after event completion. A check request form (see Appendix) should be included along with receipts or invoices. Submit by:

Scan your receipts and check request form and send electronically to the PA Treasurer for approval.

BSM Finance generates checks weekly on Thursdays. Please allow two weeks for processing.

**NOTE: All expenses, greater than \$500 must be paid directly by BSM.** Please obtain an invoice from the merchant and submit for payment; do not guarantee or pay using your personal credit card, cash or check. Submit the invoice with a check request reimbursement form to the PA Treasurer.

#### Tax Exempt

Please request sales tax exemption for all purchases if possible. Provide a copy of the Tax Exempt Certificate (see Appendix) to each volunteer at the event kick-off meeting. Each volunteer should present this certificate to merchants at the time of each purchase. (The form can be photocopied for use and is also available electronically for you to e-mail to committee members.)

Exceptions are as follows: sales tax exemption is not eligible on any food that is being catered where service is provided. Wal-Mart currently will not accept our form and require independent registration with their stores. We have not had issues with merchants such as Target, Party City, Litin Paper, or Michaels. BSM has a Costco VISA card to use for larger purchases at Costco and can be used with other merchants. Please discuss with PA Treasurer.

#### Costco/VISA Credit Cards

BSM has a Costco card and a VISA card available for use for events. Contact the PA Treasurer to arrange for use of these cards.

#### Donations

Event chairs or committee members should not feel obligated to spend their own money on events. If they do choose to make a donation during an event, all donations o

(cash or merchandise with receipt) should be documented using the Gift in Kind form (see Appendix). We do ask the event chairs keep a tally of the donations for the event records (i.e. ten gift cards from various donors at \$10 each).

The PA Board would like to capture the donations so we can track the true cost of the event. Capturing the donations helps those running the event in the future to have a historical perspective as well as the school to understand/recognize the donations received. Please make sure receipts are attached when possible (i.e. copy of tickets donated, price tags taken off merchandise if receipt not provided, estimate obtained from merchant via e-mail).

All donation documentation should be submitted within 30 days of the event completion.

### Income

For **Social Events**, set ticket price to cover all estimated expenses.

(Average attendance last 2-3 years) x (ticket price) = total available income

For Ways & Means, income will be earnings from fundraiser.

### Expenses

- Catering – food, beverage, service fees
- Program/entertainment
- Location
- Decorations
- Equipment rental
- Paper goods
- Art design
- Printing costs (i.e. programs, invitations, signs)
- Postage –(if invitations are mailed)
- Special guests & scholarships –
- Door prizes
- Supplies
- Food for volunteers

### Budgeting

Provide detailed spreadsheets with income less detailed expenses and end net result. Capture and itemize all expenses and sources of income so that the event chairs can accurately budget their event.

### Cash Boxes

If money is to be collected at the event, cash boxes must be requested from the PA Treasurer at least two weeks prior to the event. The event chair(s) should email the PA Treasurer with the requested total amount of cash, denominations, and number of cash boxes needed. When possible, the PA Treasurer should attend the event and oversee

cash. If the PA Treasurer is unable to attend the event, the event chair(s) need to coordinate with the PA Treasurer for pick up and return the cash boxes from the school safe on the day of the event along with guidelines for handling cash throughout the event.

## **Ticket Sales/Registration (Social Programs)**

### **Events Requiring Advance Registration and/or Advance Sales**

Social program events requiring ticket sales are handled online via the BSM website and tuitions billed to families.

Follow these steps to initiate online registration:

1. Send an email to [marcomm@bsmschool.org](mailto:marcomm@bsmschool.org), with a copy to the PA Treasurer, but no later than two weeks in advance of your registration start date. If a previous registration page exists, you may provide just updates for the upcoming event, i.e. new fee. Include the following information:
  - a. Event overview
  - b. Fee per person
  - c. Any unique choices, i.e. menu selection
  - d. Event Registration form fields (i.e. name, grade, number of tickets) - billing fields will be added by BSM Development which include name, address, phone and e-mail
  - e. Dates for registration form to be active (start and end)
2. Once registration goes live, submissions are sent to Development and Finance Departments for payment reconciliation, and to the PA Treasurer.
3. Registration updates will be send weekly to the PA Treasurer and event chair with more frequent updates in the days prior to the event. Please designate only 1 chair to receive these updates.

## **VOLUNTEERS**

### **Virtus Training Requirements/ Background Checks and Code of Conduct Forms**

All volunteers should have on file at BSM a current Background Check and signed Code of Conduct form. You need only complete the background check once and it will be retained by BSM for future years. Background Checks and Code of Conduct forms are available to download through the BSM website under the Parent/Volunteer Page.

In addition, all volunteers working with students and/or supervising students are required by the Archdiocese to have completed the Virtus Training. Please send the information with the Parish or School where you completed your training, as well as the year completed, to the Senior High Principal.

### **Sign Up Genius**

Volunteers are scheduled via a Sign Up Genius for all events. The prior year's event chair should pass on the link to the current year's SUG to be revised for upcoming years. If an event chair needs assistance with creating or updating a SUG, the PA Vice President can provide assistance. When SUG is created, send to website coordinator to post online.

### **Photos**

Please have a volunteer take photos at all events. Photos can be loaded into the BSM photobucket.com account. Please check with the PA Secretary on instructions to load the photos.

### **Thank you Notes**

Finally, and equally important, please be sure to thank all of those involved in putting the event together; volunteers and BSM staff. This can be done via email or written thank you notes. There is BSM PA stationary that can be used (see next section).

## **VENUE (BSM or Off-site) & CATERING**

Selection, Set-up and Clean-up

### **BSM Information**

#### Reserving Rooms

Verify all space/room needs have been reserved for your event and reserve any additional rooms for committee meetings or the event, through:

Kathy Jacobson (High School Attendance) email [kjacobson@bsmschool.org](mailto:kjacobson@bsmschool.org)

Also, please contact Kathy to cancel a pre-scheduled room if you find that you no longer need it, as there are many requests for rooms at BSM.

Advise BSM Maintenance and Event Coordinator at the time a space/room is reserved, if you need any special table/chair set up.

#### Set-up and Clean-Up

BSM Maintenance and Event Coordinator must be advised two weeks in advance of any set up needs for space at BSM.

#### Equipment needs

Equipment may include tables, chairs, mirrors, microphones, lighting, linens, staging, audio-visual, serving dishes, and beverage equipment. You will need to develop a floor plan for placement of all equipment for the Maintenance and Event Coordinator.



### Parking

Consider other school events and Jewish holidays when scheduling events. Any questions should be directed to:

Judy Koski (transportation coordinator at BSM) email [jkoski@bsmschool.org](mailto:jkoski@bsmschool.org)

### **Catering, Food & Beverages**

Catering at BSM - please obtain 2-3 bids and we recommend taste testing and observing the proposed presentation before making a commitment.

Beverage orders – when appropriate, it is recommended to source the beverages separately and not through the caterer; caterers generally add an excessive mark up on beverages. Costco, Sam’s Club, and Target are good resources. The on-site manager for Taher Food Service (BSM lunch provider) may be able to provide other resources as well.

Use tax exempt and resale exemption certificate to eliminate all sales tax.

### **BSM (on-site) Seating Capacity**

|                  |  |
|------------------|--|
| Hamburge Theater | 480<br>Note: with capacity of 520-530, depending on use of stage extension. Assuming junior high size students included. |
| Great Hall       | 1,200, including 400-450 chairs on the main floor (assume 1,000)   |
| Band Room        | 125  |
| Haben            | 2,000  |
| Chapel           | 250  |

### Off-site Facilities' Capacity

| Location                                     | Phone          | Max Cap.             |
|--|----------------|----------------------|
| Nicollet Park                                | (612)-661-4806 | 480 (Apr-Oct)        |
| Edinburgh Park in Edina                      | (952)-832-6790 | 350                  |
| Bayview Event Center                         | (952)-470-2224 | 250                  |
| University Club St. Paul                     | (651)-222-1751 |                      |
| Hyatt Regency-Nicollet                       | (612)-370-1234 |                      |
| Marquette Hotel                              | (612)-333-4545 |                      |
| Minneapolis Marriott City Center             | (612)-349-4000 |                      |
| Minneapolis Marriott Airport                 | (612)-854-7447 |                      |
| Medina Ballroom                              | (763)-478-6661 | 2000                 |
| Hotel Sofitel                                | (952)-835-3104 | 350                  |
| Hilton Shinglecreek                          | (952)-566-8000 | 500                  |
| Interlachen                                  | (952)-929-1661 | 270                  |
| Creative Concepts<br>(The Boat Works Center) | (952)-473-9331 | 400                  |
| The Reserve in Plymouth                      | (763)-559-4461 | 250                  |
| Wyndham Garden Hotel, Bloomington            | (952)-831-3131 | 320                  |
| Radisson Plaza Hotel                         | (612)-339-4900 | 350                  |
| On 42 <sup>nd</sup> Ave. Ballroom            | (612)-287-9060 | 225                  |
| Medina Golf & Country Club                   | (763)-478-6021 | 330                  |
| Holiday Inn-Wayzata                          | (952)-593-1918 | 400                  |
| Radisson South                               | (952)-893-8409 | 1300                 |
| Metropolitan Ballroom D'Amico                | (763)-797-1900 | 500                  |
| Doubletree-St. Louis Park                    | (952)-542-8600 | 450                  |
| Gateway Center- University (D'Amico)         | (651)-642-9838 | 400+                 |
| Ramada Ridgedale                             | (952)-593-0000 | 400                  |
| Radisson Plymouth                            | (763)-559-6263 | 350                  |
| Marriott Opus                                | (952)-988-3106 | 500                  |
| International Market Square                  | (612)-330 9414 | 600RM<br>1500 Atrium |
| Lafayette Club                               | (952)-471-8493 | 500                  |
| Northland Inn                                | (952)-536-8300 | 650                  |
| Golden Valley Country Club                   | (763)-545-2511 | 300                  |
| Edina Country Club                           | (952)-927-7151 | 300                  |
| Wayzata Country Club                         | (952)-473-8846 | 300                  |
| Bearpath                                     | (952)-975-0123 |                      |
| Flagship                                     | (952)-941-2000 | 75                   |
| Earl Brown Heritage Center                   | (763)-569-6322 | 1000                 |
| Chaska Ballroom                              | (952)-367-3040 |                      |
| Radisson Metrodome                           | (612)-362-6629 |                      |
| Nicollet Island Inn                          | (612)-331-1800 | 120                  |

## Check Request Form

|  |  |
|--|--|
| Date of request                                |  |
| Requested by                                   |  |
| Event  |  |
| Event Chairperson                              |  |
| Amount Due                                     |  |
| Make check payable to                          |  |
| Mail check to                                  |  |
| Detail of requests<br><br>(or attach receipts) |  |

Scan to P.A. Treasurer



**Benilde-St. Margaret's**

A Catholic, college preparatory school, grades 7-12

## Gift-In-Kind Donor Form

Event Name (if applicable): \_\_\_\_\_ Event Date: \_\_\_\_\_

Volunteer Solicitor Name: \_\_\_\_\_

*PLEASE NOTE: Receipt cannot be issued without complete information.*

### Donor Information

Donor is:  Individual  Organization/Company

Name (as it should appear on receipt and in print): \_\_\_\_\_  
(BSM is authorized to publish the donor's name)

Name of Contact Person (for Organization/Company): \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-mail address: \_\_\_\_\_

### Item Information

Item Name: \_\_\_\_\_

Estimated Fair Market Value of Item \$ \_\_\_\_\_ (Determined by Donor)  
(an employee of BSM may not provide a donor estimated value)

Item Description (please specify color, size, material, time available, or other requirements): \_\_\_\_\_

### Donor Signature

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

The Donor Signature line must be signed to verify that the "estimated fair market value" amount was provided by the actual donor

Benilde-St. Margaret's (BSM) is a 501(c)(3) nonprofit organization, Tax I.D. No. 41-1240936.  
Per IRS regulations, any item you value over \$500 requires IRS Form 8283; any item you value over \$5,000 requires Form 8283 and a qualified, certified appraisal of the donation which must be attached to this form.  
Contributions of services and partial interest (e.g. use of beach/ski condo) are not deductible as charitable contributions.  
Should you have any questions on the above, please refer to [www.irs.gov](http://www.irs.gov) publications 526 and 561, and consult your tax advisor.

Check appropriate selections:

- Tangible Item or  Certificate (if this donation is a gift certificate, please attach)  
 Donor will provide display materials (e.g. brochures, photos, posters, etc.) for intangible items.  
 Item needs to be picked up. Location \_\_\_\_\_ By \_\_\_\_\_ (date)