

# EVENT PLANNING WORKSHEET



St. Luke "Community" United Methodist Church

5710 East RL Thornton Freeway

Dallas, Texas 75223

214-821-2970

Website: [www.slcumc.org](http://www.slcumc.org)

Dr. Michael L. Bowie, Jr., Senior Pastor

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Signature of Ministry Pastor

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Event Approval Date

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**Event Planning and Detail Worksheet**

Current Ministry Budget: \_\_\_\_\_ Estimate of Event: \_\_\_\_\_

**Date:** \_\_\_\_\_

Name(s) of Ministry Leader/Coordinator
Contact Person (s):
Phone number:
Name of Event:
Purpose or Objective of Event:
Estimate of Attendance:
How will this event further the Vision or the Mission of St. Luke?
Other ministries and/or partners involved:
External resources needed for event:
Who is the intended audience for this event?
Other:

**Stage 1. Event Approval**

Type: Conference/Workshop/Other (Circle)  
 Lead Time: 6-12 Months/6 Months/3-4 Months (Circle)  
 Meeting Date: \_\_\_\_\_

	WHO	WHEN	STATUS
Check church calendar for date			
Submit forms to Ministry Pastor for <b>budget</b> approval			
Submit room request or contract to Pastor of Administration			
Confirm <b>budget</b> for event			
Confirm dates(s)			
Process certification request for <b>budget</b>			
Other:			

**Stage 2. Initial contact with the Ministry**

	WHO	WHEN	STATUS
Clarify needs:			
Audio			
Bookstore			
Communications			
Hospitality			
Finance			
Maintenance			
Praise and Worship Team			
Choir			
Security			
Transportation			
Video			
Other			
Announcements			
Registration			
Parking Ambassadors			
Ushers			
List other needs:			
Schedule meetings with ministry leader			
Prepare and delegate assignments			
Submit request forms for Media/Graphics and Video			
Schedule meeting with Minister of Worship and Arts			
Other:			

**Stage 3. Follow-up with ministry**

Lead time: 3 months

	WHO	WHEN	STATUS
Schedule Follow-up meetings with ministry leader			
Send follow-up letter/email to guest speaker/preacher			
Arrange for announcements (radio or other)			
Request for volunteers			
Gather invoices and receipts and process through Purchasing Management System (PMS)			

**Stage 4. Publicity and Follow-up**

Lead Time: 2-3 months

	WHO	WHEN	STATUS
Send out mailers to individuals, churches, etc.			
Begin announcements and registration			
Set up tables and hand out information after services			
Follow-up with ministry leaders, etc. on action plans			
Assign other responsibilities			
Follow-up with assignments for volunteers			
Schedule final meeting with ministry leaders, volunteers and Host			
Others:			

**Stage 5. Publicity and Follow-up**

Lead Time: 1 month/2-3 Weeks

	WHO	WHEN	STATUS
Schedule final meeting			
Send final letter or email to speaker(s)/preacher			
Send final letters or email invites to out of town guests			
Other:			

Final follow-up meeting \_\_\_\_\_

**Stage 6. Preparation**

Lead Time: 1-2 weeks

	WHO	WHEN	STATUS
Finances: Submit Check Request for Speaker TEN days in advance			
Final hosting (emergency contact numbers)			
Hotel accommodations			
Transportation arrangements			
Review Itinerary			

**Other Preparations**

	<b>WHO</b>	<b>WHEN</b>	<b>STATUS</b>
1. Facility			
• Room Assignments			
2. Equipment			
• Audio Visual Needs: sound system, projector, microphones, etc			
3. Podium			
4. Chairs			
5. Tables			
6. Display and Registration Tables with chairs			
7. Name Badges			
8. Registration Forms			
9. Markers			
10. Pens/pencils			
11. Notepads			
12. Flipcharts			
13. Rental			
14. Other			
15. Food			
• Beverages: Coffee, Tea, Water, Hot Water,			
• Condiments (sugar(s), creamer, stirrers)			
• Caterer Name:			
• Number:			
16. Extension Cords			
17. Trash containers			
18. Table cloths			
19. Table decorations			
20. Tableware (knives, forks, spoons), napkins, plates, cups			
21. Number of Volunteers			
22. Clean up Team			
23. Other			

**To-Do List**

	<b>WHO</b>	<b>WHEN</b>	<b>STATUS</b>
<b>TASK</b>			



## PURCHASING MANAGEMENT INSTRUCTIONS

### PROCESS TO RECEIVE CERTIFICATION FOR PURCHASES

- Submit your Request for Certification before 2 p.m. on Wednesdays
- All requests received before 2 p.m. on Wednesdays will be processed that afternoon
- All requests received after 2 p.m. on Wednesdays will be processed the following Wednesday
- It is recommended that the certification request be submitted 2 weeks before you submit your request for a purchase
- Send all certification requests to [certification\\_requests@slcumc.org](mailto:certification_requests@slcumc.org). **Do not send to oadams or Finance.**

### THE PURCHASING MANAGEMENT SYSTEM PROCESS

- All completed and approved requests received by Noon each Thursday will be processed. No exceptions.
- PO requests will not be processed on Monday.
- It is recommended that you process your request two weeks before your event.

### TO REQUEST A PURCHASE

Log onto <https://stlukecommunity.myshelby.org/portal> with your user name and password. Once you have logged into the portal, select the blue [Request a Purchase](#) to begin your request. Click on the Plus (+) sign to the left and the request page will open.

These 5 steps will complete your initial request.

- Select the correct vendor from the drop down list. If this is a new vendor, type and select new vendor, then scroll to the bottom of the page and, in the note box, provide the new vendor information--Name, Address, etc. A W-9 is required to set up the new vendor and all unincorporated.
- Next, select the drop down arrow on the approval path tab to select the appropriate approver.
- The date and period should default to the current period. After checking these boxes, in the fund name box, **always put 1 for general church fund**. Then the ministry department # should be entered, example 500, 250 etc. Next, the ministry 4-digit account number should be entered.
- The next step is to enter the quantity; then tab to description box and provide a complete description; tab to price and enter the cost.
- Scroll down the page to the green Plus (+) sign to upload and attach all support documents required such as invoices, receipts, W-9 (required for new vendors), fax & pulls, and a copy of the certification request.

Once the above 5 steps have been completed, there is a check box at the bottom of the page that you must check to advance your request to the approver. Then, select the update button at the bottom of the page to submit your purchase request for approval. An email will be sent to the Pastor/Staff person responsible for your Ministry for approval. Once approved, an email will be sent to you with the status update of approved or unapproved.

## **SAM'S CLUB REQUESTS**

Each ministry request will require the following documentation:

- A copy of the certification
- A copy of the fax & pull.
- You do not need to list the detail of the fax & pull in the system, just a 1-line description and the total. Remember, the detail is the actual fax & pull you will upload. Next, check the box to advance your request for pre-approval. After you make your purchase, you will then log back into the portal and upload the receipt. Then re-check the box to submit for final approval.

## **THINGS TO REMEMBER**

- Your request will not advance for approval until the box at the bottom of the page is checked.
- Each receipt is a separate purchase and must be entered as a separate purchase. Do not combine receipts as one purchase request.
- All receipts must be submitted or uploaded into the purchase management system immediately after purchase or within a maximum of two days.
- All supporting documentation must be in PDF format.

## **IF YOU DO NOT HAVE ACCESS TO A SCANNER**

For those who may not have a scanner, there is a program you can download called CutePDF writer. It loads onto your computer as a printer driver and anything you can print can be converted to PDF. The website is <http://www.cutepdf.com>.