

Event Management

Event Management is led by the Event Chair and involves planning, budgeting, scheduling, marketing, organizing, and finalizing the activities involved in the event.

This process needs to be completed for **each event and tournament** unless it is simply a Thursday play day with no other activities.

#	Task	Status
1	Draft the Event Information Sheet	
2	<p>Hold a kick off meeting with</p> <ul style="list-style-type: none"> • Treasurer • Golf Genius support • Social Chair • other board members as needed. <p>During the meeting,</p> <ol style="list-style-type: none"> a) review/refine the Event Information Sheet b) decide the format, the theme, and potential caterers if needed c) review the event's historical budget as well as the draft budget d) determine if sub committees are needed and if so, designate chairs e) Identify tasks related to marketing, catering, purchasing supplies, snacks, beverages, etc, organizing f) Confirm location has been reserved, assess AV / microphone needs g) Consider promoting in Rossmoor News h) Ensure all support resources understand their responsibilities for the event 	
3	Meet with pro shop resources. Provide the Event Information Sheet and review all details of the event with the pro shop resources.	
4	Refine the draft budget and provide to the Treasurer and Golf Genius support (for entry fees)	
5	Continue to coordinate and meet as appropriate to prepare for the event	
6	1-2 weeks before event, meet with GRF to pay for location and coordinate floor plan and set up .	
7	Update the budget with the actuals as you receive them.	
8	<p>At the end of the event, the Chair reviews expenses, updates actuals and submits to the Treasurer:</p> <ol style="list-style-type: none"> a. Receipts b. check request form(s) c. actual expense amounts (updated budget) 	
9	Complete an event wrap-up to capture details to support future planning. This can be captured in the budget document or a separate document. Include what worked, what could be improved as well as details re food, location, etc. The event wrap-up should be saved along with the Event Information Sheet and the Income & Expense report (budget).	

Event Management

Guidelines:

- For Guest Days, Invitationals and other major events, publicity is critical. Utilize “Save the Date” flyers and the Rossmoor News to get the word out.
- A **Purchase Order** or a written confirmation must be received from the vendor to verify the price of food services and other large purchases to be delivered at a later date.
- Each vendor must supply an original invoice; do not use vendors that do not issue invoices.
- Individual **receipts** are required for all event purchases. Do not combine expenses with personal expenses. Make sure this is communicated to all participants who will be purchasing.
- The Event Chair must approve receipts and expenses before submitting them with a **Check Request Form** (paper OR [Online Check Request](#)) to the Treasurer. The receipts must be attached to the form. More than one receipt can be combined and added together on one Check Request Form when it is payable to the same person.
- **Advance payments / checks** require a Check Request Form. When receipts for payments in advance are obtained, forward them to the Treasurer.
- **Golden Rain** statements which include room charges and charges to the Golf Pro Shop, go directly to the Treasurer. The Treasurer will email the amounts for approval if different from the budget for Room Set-up and Pro Shop Charges. (Including sweeps).
 - If the amounts are different, the Event Chair will reconcile and approve before payment is issued. (The Event Chair will immediately reconcile so the payment is not delayed.)