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Creating a Major Event Notebook

The major event notebook is a crucial piece of the foundational infrastructure for all ministries throughout the church.

These notebooks keep you from having to remember and reinvent events each year. It provides a record of what has been done in the past, who did it, and all the details around costs. It also offers a systematic checklist to help ensure the next time this event happens, all logistics have been attended to.

The first time a major event notebook is created, you will be putting it together *as* you plan and execute the event.

Before You Begin

- Identify your major events for the year.
- Determine whether you want event notebooks to be in electronic or printed form, or both.

- If you choose to have an **digital version** *(strongly recommended),* you'll want to use a shared application such as Dropbox or Google Drive so that multiple teammates can have access. Also, this allows you to keep a blank template easily available to copy and use for each event.

- If you choose to use a **physical notebook** *(not recommended, but some churches prefer physical copies of everything),* put your notebook together in a three-ring binder. You'll want a section with a blank template and a separate section in the notebook for each major event of the ministry.

- Add to the notebook a copy of your church's tax-exempt form along with a reimbursement form or procedures for volunteers to purchase needed supplies and turn in receipts.

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major event name

at (Church Name)

Summary Information

Name of event: _____

Date/time of event: _____

Location of event: _____

Purpose of event: _____

Staff liaison: _____

Role: _____ *Contact info:* _____

Team Leader: _____

Role: _____ *Contact info:* _____

Team Leader: _____

Role: _____ *Contact info:* _____

Targeted ages/groups: _____

Childcare needed: Y or N **How many volunteers needed?** _____

Space/rooms needed: _____

Person responsible for reserving: _____

Contact info: _____

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Volunteer List

Publicity coordinator: _____

Contact info: _____

Decorations coordinator: _____

Contact info: _____

Food volunteer: _____

Contact info: _____

Program/leader of event: _____

Contact info: _____

Clean-up volunteer: _____

Contact info: _____

Equipment coordinator: _____

Contact info: _____

Supply coordinator: _____

Contact info: _____

Other volunteers: _____

Contact info: _____

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Timeline *(Fill in what needs to happen when)*

One year *before the event*:

Six months *before the event*:

Four months *before the event*:

Three months *before the event*:

Two months *before the event*:

One month *before the event*:

Three weeks *before the event*:

Two weeks *before the event*:

One week *before the event*:

Three days *before the event*:

The week after *the event*:

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Budget

Name of event: _____

Amount budgeted for event: _____

Who will manage the budget for this event? _____

*Contact info:*_____

Is a fee being charged to the participants? Yes No

*Amount(s):*_____

Budget Breakdown

Breakdown of expenses	Projected	Actual
Food		
Program		
Supplies		
Promotions		
Transportation		
Off-campus costs		
Lodging		
Rental Fees		

Breakdown of expenses	Projected	Actual
Gas		
Other		
Other		
Total Expenses	_____	_____

Budget

Breakdown of income	Projected	Actual
Fees from participants		
Funds from budget		
Other		
Other		
Total Income	_____	_____

Total Income

– **Total Expenses** **-**

_____ _____

Profit/Loss

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Program / Featured Happening

Coordinator of program: _____

Location of program: _____

Equipment needs: _____

Who will set up equipment? _____

Where do things need to be set up? _____
(attach a diagram if necessary)

Who will take down/put away equipment? _____

Supply needs: _____

_____

Who will collect/purchase supplies? _____

When and where do supplies need to be placed? _____

_____

Who will clean up supplies? _____

Where do leftover supplies go? _____

Other needs for program: _____

Who is going to send thank you notes? _____

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Program Vendors

If vendors were used, include their contact information and the cost:

Decorations vendor: _____

*Contact info:*_____

Service provided and cost: _____

Music vendor:_____

*Contact info:*_____

Service provided and cost: _____

Sound vendor: _____

*Contact info:*_____

Service provided and cost: _____

Lights vendor: _____

*Contact info:*_____

Service provided and cost: _____

Program vendor: _____

*Contact info:*_____

Service provided and cost: _____

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Schedule of the Event - *EXAMPLE*

See the example below or use the schedule template on the following page.

Example:	**Youth Fall Kickoff, 7:00-8:30 p.m.**
5:00 p.m.	Decoration team arrives to decorate
6:00	Staff arrives
6:30	Other volunteers arrive to prepare for program
7:00	Youth and parents arrive Welcome time Mixers/games/activities: getting everyone engaged Serve snacks and drinks
7:30	Official welcome from leader Announcements ● Introduction of volunteers ● Pep rally—it's gonna be a great year
7:45	Parents go to their information session ● Hand out packets of information ● Go over forms ● How parents can help Youth: get their input and ideas ● Calendar: what's coming up ● Promote special events ● How important each person is and why we want them to be involved
8:15	Group regathers ● Closing music and prayer
8:30	Good night
8:45	Volunteers clean up Check in on anything that needs to be followed up

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TIME	WHAT AND WHERE	WHO
8:00 a.m.		
8:30		
9:00		
9:30		
10:00		
10:30		
11:00		
11:30		
Noon		
12:30 p.m.		
1:00		
1:30		
2:00		
2:30		
3:00		
3:30		
4:00		
4:30		
5:00		
5:30		
6:00		
6:30		
7:00		
7:30		
8:00		
8:30		
9:00		
9:30		
10:00		
10:30		
11:00		
11:30		

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Promotions

Overview: *A promotions coordinator will plan and schedule the communication efforts related to this event in an effort to engage the audience for which the event is happening.*

Promotions Coordinator: _____

*Contact info:*_____

Information necessary to promote event:

What?_____

Who is the target audience? _____

Where?_____

When (date and time)?_____

Cost? _____

How?_____

Purpose?_____

Contact person for more information:_____

*Contact info:*_____

Special artwork: _____

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Promotion Options

How should the event be promoted *(check all that apply):*

- o Email
- o Ministry newsletter
- o Church newsletter
- o Post office mailing
- o Phone Calls
- o Website
- o Facebook
- o Instagram
- o Other _____
- o Announcements during worship
- o Announcements during_____
- o Newspaper ad *(if so, which paper?)* _____
- o Fliers for church
- o Fliers for community *(if so, where?)*_____
- o Other: _____

Date promotions should begin: _____

Date promotions should end: _____

Specific deadline dates for:

Newspaper:
Post Office Mailing should go out:
Website:
Emails should go out:
Church Newsletter:
Phone calls should be made:
Announcements:
Fliers should go up:

Date to follow up with Promotions Coordinator: _____

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Promotions Vendors

If any vendors were used for promotions, include their contact info and the cost:

Graphic art vendor: _____

*Contact info:*_____

Service provided and cost: _____

Newspaper ad vendor:_____

*Contact info:*_____

Service provided and cost: _____

Printing vendor: _____

*Contact info:*_____

Service provided and cost: _____

Other promotions vendor: _____

*Contact info:*_____

Service provided and cost: _____

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Roster of participants

Name	Contact Information

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Communications Plan

How does someone sign up for this event? _____

Who is in charge of the roster? _____

Who is in charge of collecting fees *(if applicable)***?** _____

Does a checklist or what-to-bring list need to be sent out? Yes No

If so, who will create it? _____

Who will distribute it? _____

When does the checklist/to-bring list need to be distributed?_____

Do children need a medical release form filled out for this event? Yes No

If so, who will:

get forms to children and parents? _____

make sure forms are collected? _____

What is the date that all forms should be collected? _____

Are there any other forms that need to be filled out for this event? Yes No

If so, list the forms below and the name of the person who will take care of distribution and collection of those forms.

FORM	COLLECTOR
_____	_____

Other Communication Needs:

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Food

Food coordinator: _____

Contact info: _____

What	Specifics	Who's In Charge

- Snacks _____
- Meal _____
- Drinks _____
- Plates, bowls, cups, utensils, napkins _____
- Other _____

How many people are being fed? _____

Time food is to be delivered: _____

Location of where food is to be delivered: _____

Who is setting up food? _____

Who is serving food? _____

Who is cleaning up food? _____

Food Vendor: _____

Contact info: _____

Food provided and cost: _____

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Off-campus Event Information

Location of event: _____

Time to arrive: _____

Length of stay: _____

Departure time: _____

Details of the activity: _____

_____

Do reservations need to be made? Yes No

If so, who will make the reservations? _____

Deposit required? Yes No

If so, amount of deposit _____**due by** _____

Who will submit the check request? _____

Are other reservations necessary? Yes No

If so, what are the details: _____

_____

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Off-campus event transportation

Carpool or transportation needed? Yes No

Transportation Vendor: _____

*Contact info:*_____

Service provided and cost: _____

Permission slips for children/youth and for drivers of cars/van? Yes No

Who will take care of this? _____

Emergency phone number to be given to parents: _____

Where is the first-aid kit? _____

Who is responsible for the first-aid kit? _____

Other details listed below:

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Planning Meeting Notes

Meeting date:

Participants:

Decisions made:

Action Item	Due Date	Responsible Party

Notes:

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Additional documents

_____ Copies of promotional materials

_____ Copy of church's tax-exempt form for purchases

_____ Copy of reimbursement form and procedures for turning in receipts

_____ Copy of or link to the ministry database with contact info

_____ Copy of church's child-protection policy

_____ Instructions on what to do in case of an injury

_____ A map of the layout of the event

_____ Fliers, invitations, or other printable materials

_____ Other:

_____ Other:

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Post-event review

Event Evaluation Survey

SUBMIT TO: (*Insert name and email*)

This survey can be used in a few different ways:

- *Copy and paste in an email to your team for feedback*
- *Print and pass out for your team to complete at end of event*
- *Create a Google survey with the same questions (if wanting to provide an opportunity for anonymous feedback)*
- *Have a team debrief meeting a week after the event and take notes as the team shares their thoughts.*

Simply delete this top portion and share with your team.

Name of event	
Date(s) of event	
Coordinator(s)	

Attendance	**Volunteers**	**Participants**	**Other**

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What was the win for this event?	
Did we get the win? (Why or why not?)	

What worked well?	
What did not work well?	
What do you wish you would have known before planning this event?	
What needs to be done differently next time?	

Anything else?

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Event Evaluation Survey

Copy + Paste Version

SUBMIT TO: (*Insert name and email*)

Name of Event:

Date(s) of Event:

Coordinators:

Attendance → **volunteers:** **participants:** **others:**

What was the win for this event?

Did we get the win?

Why or why not?

Were there other wins?

What worked well?

What did not work well?

What do you wish you had known before planning this event?

What needs to be done differently next time?

Anything else?

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EXAMPLES of Organizational Tabs

If creating a physical form of your major event notebooks, here are suggestions for tabs. *Not all of these apply to every event; choose the ones that apply to yours. There will also be tabs you'll create that are unique to your event.*

- Summary information
- Volunteers
- Timeline
- Budget
- Program summary
- Schedule
- Promotions
- Roster of participants
- Communications
- Food
- Transportation
- Meeting notes
- Post-event evaluation
- Documents needed for the event

Additional Tabs Example: *Vacation Bible School*

In addition to the sections outlined above, an event such as VBS might also include additional tabs or sections unique to this event:

- Volunteer schedule/rotation
- Snack providers
- Shepherds
- Teachers
- Teen volunteers
- Music program
- Art and crafts
- Registration
- Service project