ADMINISTRATION DEPARTMENT
Community Event Approval Policy

Adopted
August 11, 2009

Effective
September 1, 2009

	Policy: Community Event Approval Policy	**Effective Date:** 09/01/2009
	Policy Number: POL-2009-002	**Revision Effective Date:**
	Responsible Party: Town Manager	**Revision Page Number:**

I. PURPOSE

The purpose of the Community Event Policy is to provide guidelines for the budgeting, planning, approval, and execution of Community Events provided by the Town of Summerfield. This policy applies to all events in which the Town of Summerfield promotes, plans, or executes, including partnership events between the Town and other entities.

II. DEFINITIONS

Event: Any community function planned by/in conjunction with the Town

Budget: A plan for the coordination of resources and expenditures

Advertising: Includes website notices, newspaper articles, event notices, paid advertising spots, brochures, flyers, and posters. All events shall be posted on the Town website, on the official bulletin board at Town Hall, and on the bulletin board at the Summerfield Community Center at a minimum.

III. EVENT APPROVAL

A) All events of the Town proposed by any staff, Town Council, committee, or citizen group must be approved in advance and in concept by the Town Council or its designee.

B) All events requiring the expenditure of funds must be properly budgeted through the annual approval of the Summerfield Operating Budget or through a budget amendment by Council.

C) All fundraising activities must be in accordance with policy 2009-001.

D) Detailed event budgets and proposed activities must be approved through the process outlined below. Approval must be made in advance of any fundraising or expenditure of funds.

E) Any expenditure of funds by individuals before approval of the detailed event budget and activities may not be reimbursed and will be considered unapproved expenditures as provided for in policy P-2008-001 Purchasing Policy and Procedures Manual.

F) Any partnerships between the town and other entities must be defined through a Memorandum of Understanding (MOU) that must include a statement regarding conflicts of interest between the organization and the Town as well as the names of the owners of the company, if applicable. The partnership entities must present a valid business license

and proof of a properly filed annual report as evidenced by the NC Department of the Secretary of State website, if applicable. All MOU's must be approved by the Town Manager, Town Attorney, and Finance Officer and signed by all parties in advance.

IV.   EVENT PLANNING

A) In order to develop an event or activity, it is appropriate for staff, committees, or others to research and discuss the events with other organizations, staff, or persons not immediately associated with the Town of Summerfield.

B) As soon as practical, a detailed plan for the event shall be submitted to the Town Manager for approval. It is the Town Manager's responsibility to determine if the program has been approved in concept by the Town Council or is required to be approved by the Town Council.

C) The detailed plan of the event shall include the following information:
- Brief description of event
- Goal
- Partnerships and sponsorships requested
- Target audience including who, and how many
- Approved event budget
- Proposed fundraising plan (if any) including financial goal
- Date(s), time, and duration of event
- Location(s) of event including layout of event at the site
- Staff support/resources requested
- Advertising plan
- Volunteer support plan
- Refreshment plan (if any)
- Logistical plan to include traffic control, crowd control, trash removal, inclement weather plan, etc.

D) Event dates for groundbreakings, grand openings, and other events where the presence of the Town Council is officially requested must be approved by the Town Council.

E) The Town Manager or designee shall work with the event organizers to ensure that all required policies and ordinances are met. Upon approval of the event by Council, the Manager, Finance Officer, and committee's event organizer shall sign the approved detailed plan and event budget. The signed document shall designate authority to hold the event and shall designate necessary expenditure processes and approvals.

F) All advertising for the event shall be approved in advance by the Town Manager or designee. Advertising copy must be submitted at least **three weeks** before the planned advertisement run date. Requests for copies of flyers, posters, or other graphic displays must be made at least three weeks before the materials are required. Requests for special paper size or color must be made with the advertisement submission.

The Manager or designee reserves the right to publish in color or grayscale based on the graphics, number of copies, budget, and material availability. The Manager reserves the right to edit for content, clarity, or design any materials associated with Town events.

V.   EVENT CONCLUSION

A) It shall be the responsibility of the event organizer to perform an "after-action" report that details how the plan was carried out and provides information as to the success or failure of the event or aspects of the event. The report shall also recommend if the event should be held in future years (if appropriate). The report shall be filed with the Town Clerk within four weeks of the end of the event and reviewed by the Town Manager.

B) A detailed report of revenues/expenditures shall be created by the Finance Officer to be filed with the report for future planning.

C) The committee's event organizer is responsible for providing timely and appropriate recognition to volunteers, sponsors, or others involved in the event. This includes, but is not limited to, ensuring that proper donation acknowledgement letters are created in accordance with IRS rules. All correspondence must be reviewed by the Town Manager, Finance Officer, or designee prior to distribution.

EVENT PLAN/BUDGET

I.   GENERAL INFORMATION

Event Title: _____

Committee: _____

Responsible Person: _____

      Phone: _____   **Cell:** _____

      E-Mail: _____

Description of Event:

Goal of Event: _____

_____

_____

Target Audience: _____

_____

Date(s) of Event: _____

Location(s):
_____ **Town Hall**

_____ **Summerfield Community Park**
    _____ **Amphitheatre**
    _____ **Community Center**
    _____ **Picnic Shelter**
    _____ **School House Lake**
    _____ **Fishing Pier**
    _____ **Other** _____

_____ **Summerfield Athletic Park**
    _____ **Baseball Fields**
    _____ **Multi-Purpose Field**
    _____ **Other** _____

    _____ **Other** _____

II.   BUDGET/FUND RAISING

1) Budget Approved in Fiscal Year Budget? _____ Yes   _____ No

If "No," contact Town Manager or Finance Officer to determine type of Budget Amendment required. Budget Amendments must be approved before further action is taken.

2) Fund Raising

Will Fund Raising/Sponsorships be undertaken? ____ Yes _____ No

If "Yes", then must follow Summerfield Fund Raising Policy 2009-001. Please list persons actively involved in fund raising program.

_____

_____

_____

_____

Is a good or service being provided to sponsors of/donors to the event? If yes, list the good or service and its value (i.e. Event T-Shirt= $5.00). The donation acknowledgement letter must mention the good or service and its value provided in exchange for the donation. If no, donation letter shall state, "No goods or services were provided in exchange for this donation".

List all goods or services and the name and contact information for each provider. Use additional sheets if necessary. Update this information as appropriate.

Good or Service	Provider
1. _____	_____
	_____
2. _____	_____
	_____
3. _____	_____
	_____

3) Revenue Generation – are attendees going to be charged fees for any part of the event? If yes, how will revenue be generated and what will be the cost to the attendee?

4) Budget:

       Revenues:
       Town Funds   _____
       Donations-Financial Goal   _____

       Expenditures:
       Advertising   _____
       Rental of Equipment   _____
       T-Shirts   _____
       Refreshments   _____
       Entertainment   _____
       Paper Products   _____
       Other Supplies   _____
       Other _____   _____
       Other _____   _____
       Other _____   _____
       Other _____   _____
       Other _____   _____

III.   **EVENT PLANNING**

    Timeline

1) Advertising: What type of advertising is proposed? Provide a copy of the draft advertisement for approval. The Town Manager must approve all advertising. If staff support is requested to develop the advertising, then at least an additional 3 weeks must be added to the time frame below. A request for staff time must be made as early as possible in the planning process.

                                                                      Date of Ad

____ **Town Website (submit 3 weeks before release)**   _____
____ **Town News Release (submit 3 weeks before release)**   _____
____ **Flyer**   _____
____ **School Flyer**   _____
____ **Posters around Town (list locations)**   _____
____ **Signage (provide sketch and list locations)**   _____

_____
_____
_____
_____
_____

____ **Northwest Observer**
    ____ **Paid Advertisement (submit to Manager 3 weeks before run)**   _____
    ____ **Community Event Notice (submit to Manager 3 weeks before run)**   _____
    ____ **News Article (Must have Town Manager approval)**   _____

____ **News & Record**
    ____ **Paid Advertisement (submit to Manager 3 weeks before run)**   _____
    ____ **Community Event Notice (submit to Manager 3 weeks before run)**   _____
    ____ **News Article (Must have Town Manager Approval)**   _____

____ **Other Websites (list URL)**

    _____   _____
    _____   _____
    _____   _____

2) Staff Support/Resources Requested (including purchasing plan)

_____

_____

_____

_____

3) Volunteer Support Plan
    Organizing (planning, advertising, scheduling, purchasing)
    Day-of (parking, MC, etc.)
    Clean-up
    Donation acknowledgement letters
    Follow-up reporting

_____

_____

_____

_____

_____

_____

_____

4) Refreshment Plan
       Type of refreshments
       Quantity of refreshments

_____

_____

_____

_____

5) Logistics Plan
       Equipment
       Portable Restrooms
       Trash Removal
       Traffic Control
       Crowd Control
       Clean up plan
       Other _____
       Other _____
       Other _____
       Other _____

_____

_____

_____

_____

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