

# **CWS Event Planning Process**

To have funding requests approved, the following steps must be completed in this order:

- Complete CWS Expenditure Request form
- Attach meeting minutes to form (from meeting during which this expenditure was approved by organization members)
- Meet with CWS chair for preliminary event approval minimum three weeks before purchase
- Within two business days of meeting with CWS chair, meet with CWS program coordinator to discuss event logistics (treasurer must be present at this meeting)
- Complete CWS Event Budget Planning form before or during meeting with CWS program coordinator

The following must be completed after each purchase to have funding for future purchases:

- Return receipts and list of attendees within 2 business days of event
- Treasurer needs to meet with CWS program coordinator within one week of event in order to reconcile the budget and prepare a report for the organization (Budget Report Form)
- Organization officers and event committee members need to complete and submit Event Reflection Form to CWS program coordinator (this can be waived if the purchase isn't attached to a specific event)
- Retain a copy of this event packet for organizational records

**Note: The key to successful event planning is delegation. The organization president can and should recruit other officers and organization members to get involved in this process.**



## CWS Expenditure Request

**Complete this form and bring it to the CWS chair for approval a *minimum* of three weeks prior to the anticipated date of your first purchase.**

**Within two business days of obtaining CWS chair approval, bring this form and meet with the CWS program coordinator to discuss your event logistics.**

Organization	Event Title

Event Date(s)	Event Location	Money Requested

Description of Event

How Does This Event Conform to the Goals and Objectives of CWS and Your Organization?

This event proposal was approved by [ ] majority or [ ] unanimous vote of our active members on \_\_\_\_/\_\_\_\_/\_\_\_\_ (as shown in the attached meeting minutes).

CWS Chair Approval (Signature, Date)

## CWS Event Budget Planning

The things you need to purchase will change depending on your event. Here's a list of items to consider: 1) Venue, 2) Advertising, 3) Speaker Expenses, 4) Food, 5) Gifts, 6) Photography, 7) Printing/Copying, 8) Misc. Supplies

Event Title	Total Event Budget

Vendor	Items to be Purchased	Maximum Cost	Percent of Budget
Maximum Total:			

CWS Program Coordinator Approval (Signature, Date)

CWS Advisor Approval (Signature, Date)

## CWS Budget Report

This form needs to be completed by the treasurer during their meeting with the CWS program coordinator within one week of event.

CWS Org.	Event Title	Event Date

Vendor	Items Purchased	Receipt?	Predicted Cost	Actual Cost
Total:				

Has the list of attendees for this event been returned to the WRC?

- No
- Yes

S&A Funds Budget Categories	Previous Balance	New Balance
Total:		

Were any RSO Funds used for this event?

- No
- Yes, \$\_\_\_\_\_

Current RSO Balance after this event: \$\_\_\_\_\_

Organization Treasurer Approval (Signature, Date)

CWS Program Coordinator Approval (Signature, Date)

## **CWS Event Reflection**

These questions are intended to help you reflect on your event and work together to determine how you can improve future events your organization plans.

1. How many guests were you anticipating at your event? Were you surprised by the number of guests who came? Why or why not?
2. What went well during the planning process and at the event itself?
3. What do you want to improve during the planning process of your next event and during the next event itself?
4. Have you completed an event reflection for a previous event? If so, how did you implement the changes you had wanted to implement then?