

Circle Project Planning Checklist

- Circle vote to do Project
- Determine ticket/participation fee (be sure this is an amount all of Circle agrees on and will cover all event expenses), including insurance and ABC License costs if applicable.
- Submit “**Project I Application Form (PI)**” to KD office for KD Board Approval. The best timeframe for submission is at LEAST 3 months prior to event date/project start date.
- Create a timeline of tasks and completion dates.
- Brainstorm additional revenue ideas (if appropriate to event, partner with vendors who’ll help promote event, chance drawing, etc.)
- Confirm event venue and send office rental agreement to The KD office to be signed by Executive Director.
- Contracts/Agreements submitted to KD office for review and signature (ABC Request, Insurance, rental, entertainment, etc.) Allow at least two weeks review.
- Projects officially approved via email/at monthly KD Board meetings (Official approval confirmation to be emailed to project chair and circle leader).
- ABC license – *If you plan to serve alcohol at your event, contact KD office to determine if purchasing an ABC license is required (\$55 beer/wine or \$115 liquor +beer/wine).
- **Fill out and submit “ABC Request Form”** (provided by KD website). KD office must purchase and Circle will be invoiced and will reimburse.
- Submit all proposed print materials for your project to KD office including:
 - Project sponsor/donor ask list to KD office for review/approval.
 - Ask letters to KD office for edits/approval (office can assist with creation/ mailing of ask letters if needed/requested).
 - Tickets – if you have event tickets designed by Circle member/friend, submit draft to KD office prior to distribution/printing (or submit request for KD office to design ticket via Project I Application Form).

- Circle submit Project website event write-up to KD office to add to www.kingsdaughters.org events listing and Circle web page.
- Online Ticket Sales – submit request to KD office to set up.
- Set up Square account for processing CC's at event if necessary. Please call KD office and speak to the Development Operations Manager with your Circle's I.D. and password access to your Square account.
- Invitation/Flyer – refer to **“PR Checklist for Circle Project Print Materials”** (provided by KD office) and submit draft created by Circle to KD office for official approval prior to distribution/printing. Or submit request for KD office to design invitation/flyer via Project I Application Form.
- Circle web page – submit request to KD office for edits/updates to Circle web page.
- Facebook – create a Facebook event on your Circle page; have all members “like” and select “going” to the event and share the event on their personal page. All members should then invite friends and KD Staff to the event. Submit photos from “last year” to help with project promo on FB via KD fan page, Circle fan page, etc.
- Utilize **“Media Contact List”** (provided by KD office) and add Circle Project to Hampton Roads' community online calendars.
- Assign an event photographer.
- Submit **“Circle Supply Request Form”** to borrow event supplies 2-3 weeks prior to event. Please include quantity of items needed. Supplies will be available to pick up no sooner than week of your event.

Please return items as soon as possible- items may be needed for other projects.

After Project Completion:

- Finish collecting all expected income from patrons, sponsors, etc.

- Development Operations Manager will email Circle Treasurer and Project Chairs when online sales are transferred to Circle checking accounts; typically 1-2 weeks after the event.
- Pay any final expenses from project.
- Complete “**Project II Completion Form**” and submit to KD office along with project donation check (***be sure to send 1 check per project and include event name in memo***).
- Thank you letters sent to all donors, patrons, etc. (KD office can assist/provide supplies as needed).
- Submit event photos to KD office for online posting via Circle web page and King’s Daughters annual recognition.



www.KingsDaughters.org
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