



## Circle Project Planning Checklist

### Before Project:

- ☐ Circle votes to do project
- ☐ Determine ticket/participation fee. Be sure all of Circle agrees on amount and that it will cover all event expenses, including insurance and ABC License costs if applicable.
- ☐ Submit **Circle Project Application Form (P1)** to KD office for KD Board approval. Aim for at least 3 months prior to event date/project start date. Projects are approved via email/at monthly board meetings. The Membership & Marketing Coordinator email the project chair & Circle leader when it is approved.  
*(This timing allows The KD office to get approval from the KD Board of Directors, time to promote event on the KD website/social medias, and time for the Executive Director to look over submitted contracts/agreements.)*
- ☐ 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.
- ☐ Submit contracts/agreements (insurance, rentals, entertainment, etc.) to Membership & Marketing Coordinator so Executive Director can review and sign. Allow at least two weeks for review.
- ☐ If alcohol will be served at your event, contact the KD office to confirm who will provide and serve the alcohol. If deemed necessary, complete the ABC License Request Form provided by the KD office. This is not the license application; the KD office must secure the ABC license. Do not apply for this license yourself. Confirm the price with the KD office, and allow 30 days for processing. The Circle will be invoiced by the KD office. An ABC license is a project expense.

- ☐ Work with Membership & Marketing Coordinator to submit an insurance form if you plan to serve alcohol at your event, if it is a sporting event, etc. Note: if ABC license is necessary, an insurance form will be necessary.
- ☐ Request Membership & Marketing Coordinator set up online ticket sales. Allow 2 weeks for request to be fulfilled.
- ☐ Set up Square account for processing CC's at event, if necessary. Call KD office and speak to Development Operations Manager with your Circle's ID and password access to your Square account.
- ☐ Submit all proposed print materials to Membership & Marketing Coordinator for review/approval prior to printing or distributing digitally, including:
  - Sponsor/donor ask list
  - Sponsor ask letters (KD office can help create/mail these if requested)
  - Tickets
  - Invitation/flyer/logo

Refer to the **Checklist for Circle Project Print Materials** (Circle can have a member/friend design materials. The KD office can also design. Please request this on the P1).

- ☐ Edit Circle web page and submit event write-up for KD office to put on [kingsdaughters.org](http://kingsdaughters.org) events listing and Circle web page.
- ☐ Facebook – create a Facebook event on your Circle page/group
  - Add The King's Daughters for CHKD as co-host
  - Have all Circle members "like" and select "going" to the event
  - Have all Circle members share the event on their personal page.
  - Have all Circle members then invite friends and KD Staff to the event.
  - Submit photos from "last year" to help with project promo on FB, Instagram or social media via KD page, Circle page, etc.
- ☐ Utilize **Media Contact List** (provided by KD office) and add the Circle Project to the Hampton Roads community online calendars.
- ☐ Assign an event photographer.
- ☐ Submit **Circle Project 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 event.
- ☐ Pay any final expenses from project. Whenever possible, hand deliver checks.
- ☐ Complete **Circle Project Completion Form (P2)** and submit it to KD office, along with request for transfer of funds raised for your event. If you have sponsorships of \$1,000 or more, complete the Circle Honor Roll Template and submit by July 31<sup>st</sup>. The Membership & Marketing Coordinator can share the Template with you. ***Please email transfer requests to Dev Ops Mgr as it should appear in the Annual Report.***
- ☐ Send thank you letters to all donors, patrons, etc. (KD logo cards and letterhead are available through the KD office).
- ☐ Submit event photos to KD office for online posting and annual recognition.
- ☐ Tag KD on Facebook/Instagram photos #kingsdaughterschkd
  - Facebook.com/kingsdaughterschkd
  - Instagram.com/kingsdaughterschkd