

# Guidelines For Event Leaders

## Introduction

This document is a reference for club members planning events and trips that require prior bookings and payments to organisations providing services for the trips.

If prior bookings are required and there are limits on numbers of attendees, either minimum or maximum, then the events register should be used to keep track of bookings. These guidelines need not apply to events where bookings are not required and payment is made directly to the provider but the “Trips and Events Register” should be used to keep track of bookings and attendees for insurance purposes.

## Payment for Activities

- Payment for activities can be made by cheque or cash.
- All cheques for payment for trips, luncheons, theatres etc should be made payable to: -  
PROBUS CLUB OF TEMPLESTOWE VALLEY Inc.
- All cash and cheques should be checked in the presence of the member paying and a receipt issued immediately.
- Activities should be paid for in full, unless the cost is \$200 or greater in which case deposits may be accepted, however, full payment should be encouraged.

## Handling of Funds

- After reconciliation of the funds, the event leader should place all cheques and cash gathered that day, for each event in the brown envelopes provided by the Treasurer for that purpose.
- All details on the envelopes are to be completed by the event leader. The envelope must then be passed to the Treasurer to be deposited in the club’s bank account.
- The Treasurer will check and confirm the contents of each envelope in the presence of the responsible event leader.
- When booking and paying the vendor for events, an invoice and receipt should be requested and passed to the Treasurer with the funds.

Note: Event leaders should not take cheques or cash home, as these funds are not insured by Probus. They are only insured by Probus when the Treasurer receives them and then only for a period of two days. Also, event leaders are instructed not to draw cheques for payment for any activity from their personal chequebooks or use their credit card for that purpose.

- The Treasurer must deposit all cash and cheques for payment for an event in the club’s bank account.
- The Treasurer will not draw any cheques for an event until the required amount of money has been deposited and cleared in the club’s bank account .
- When all funds for a specific event have been deposited and cleared, the events leader must complete a payment request form and hand this to the Treasurer who will draw a cheque from the club’s bank account pay for that event. to be available before the due date.

## Proposing Events

When a suitable event or function in which club groups may wish to participate is identified, and bookings need to be made and or funds need to be collected, the event will be regarded as a “major event”. If this is the case, then the organiser must notify the “Major Events Officer” (MEO) who will note the event dates and hand them the club’s

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events documentation. This is to be completed and returned to the MEO who will refer it to The Committee for consideration prior to any commitments being made. The documents are available from the MEO or club Secretary.

- When the MEO has been advised that the committee has approved the event, the event leader can then complete a “Trips and Events Register”(available from the MEO), for the event. The register has a list of member’s names and three columns to be used to keep track of members who have booked, paid and those who attended.
- The columns on the Register: are “B” to tick when a member wishes to book for the event, “P” to tick when the full amount has been paid after a receipt has been issued and the column “A” to be used on the event day to keep track of who has attended. This cross-reference will then be used by the event organisers to manage the bookings and determine when there are enough names to justify the event going ahead. Any non members’ names are to be written on the blank page on the back of the register with the same details.
- Meanwhile, the event will be listed in the newsletter and on the planning boards seeking participants. When it is determined that there are sufficient numbers for the event to proceed, the event leader will then advise the MEO and Newsletter editor to let the members know when payment is due.
- After the event, the organiser should pass the completed Trips and Events Register to the MEO to hold as a record of who attended the event.

## **Making Event Bookings**

- When organizing an event, event leaders must ascertain from the event operator, the highest booking price per person. This is normally the charge for a minimum number of people. For example, 30 rather than a full busload of say 45 people. This maximum price is to be the price advertised and charged to members for the event. Excess funds will be held by the Treasurer for future club use. This rule may be waived for larger more expensive trips on the approval of the committee.

## **Advance Bookings**

No advance bookings to vendors are to be confirmed unless the minimum number of bookings specified for the trip have been received and fully paid for.

## **Members’ Priority**

- Once it has been decided that there are enough people, the final date for payment will be announced in the next newsletter and at the following club meeting with payment being due BEFORE the meeting following that.
- Payment in FULL will normally be required. Deposits will not be accepted unless an arrangement for this for all participants has been made.
- When payment is received for an event, the date on the receipt will be used to prioritise a list for the inclusion of non-member partners and friends should members not make up numbers (see below).
- Members may nominate ONE non-member partner or friend to accompany them to an event. If paid-up members do not fill the required number, non-member partners or friends may be included.
- If there are more applicants than vacancies, then date of payment will decide priority or, if necessary, a ballot will decide selection.

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In summary, events will be filled in the following priority:

- Paid up members get first priority
  - Should the maximum number NOT be filled by members, nominated non-member partner or friend will be included with date of payment providing priority.
  - Should members and nominated non-member partner or friend NOT fill the maximum number STILL, additional friends may be included.
  - Should the maximum number STILL NOT be filled by members, nominated non-member partner or friends, the event may be advertised to other local Probus Clubs.
- Note that once non-members have paid for events, their booking is firm and cannot be cancelled in favour of a member's subsequent request for a booking.

## **Member's Cancellation**

- If a member or non member has paid for an event but has to cancel, their place can be offered to others but they will need to arrange cross-payment between themselves. They may alternatively request a refund from the event operator. The club event leader may help obtain a refund but the club has no responsibility if this is not granted. A refund will not be made from club funds unless special circumstances such as death, illness or hardship have necessitated the cancellation. These exceptions must be referred to the committee in writing through the Welfare Officer from the person affected or their representative, for specific approval of a refund and if approved by the committee will be paid for from excess funds.