

PROGRAM/ACTIVITY CHECKLIST

Overview:

This checklist is to be used collaboratively by the Programs & Activities Coordinating Team (PACT) point person and the program/activity initiator to get the approved program or activity established and functioning. Many items on the checklist relate to working with an outside speaker or facilitator. The checklist applies to presentations open to the entire congregation, not to informal visits by speakers to specific committees or groups.

1. Clarify your purpose

1. ___ What is the desired outcome from your program or activity? (education, inspiration, reinforcement of the month's theme, building community, other?)
2. ___ (If there is a guest speaker involved), what is new or unique about what this speaker offers?
3. ___ Who is the intended audience (who will be especially interested in this presentation)?
4. ___ Does the speaker "fit" with the church audience in terms of both subject matter expertise and ability to present in a clear and interesting manner?

TIPS:

- Consider talking with a few church members to "field test" your idea for a speaker.

2. Covering Costs

Any costs associated with a program or activity must be discussed up front with the Point Person and any financial support from the Church must be pre-approved by the PACT and the Church Administrator. The PACT has a limited budget which includes an annually-established number of hours of church staff time (i.e. for audio-visual support or for childcare assistance), as well as a limited number of dollars. Requests for these hours or dollars must be submitted to the PACT and the church administrator one month in advance of the start of a program.

Examples of costs that may be pre-approved are: a small honorarium for a speaker, materials for a poster to promote the program, or mileage for a guest presenter traveling from out of town.

- Generally, the church covers the cost of copying handouts provided by the program initiator or program presenter, unless there are special circumstances.

- In some cases, the point person and program leader may decide to set out a Tip/Appreciation Jar for attendees to voluntarily contribute money to the presenter.
- Reimbursement requests from the Church are made using a standard form provided by the Church Administrator.

3. Selecting the right speaker/presenter After you have clarified the purpose of your proposed activity using a speaker, be sure the speaker is suitable:

- Have you seen or heard the speaker's presentation on the topic?
- What has been the reaction to the speaker in these sessions?
- Does the speaker have qualifications that bolster their presentation and acceptance by the audience?
- Does the speaker's style fit the prospective audience, for example talking in a rap style might work for youth, but not adults?
- Does the speaker allow Q & A?
- Get their bio for reference.

4. Scheduling

1. ____ Work with the speaker/presenter and with Jennifer Luce, Congregational Administrator (Phone: 805-644-3898, ext 100; email administrator@uuventura.org) to secure an appropriate date, time and room
2. ____ For audio visual needs (microphone set up and takedown, PowerPoint), arrange with Brian Fortune *one month in advance, through Jen Luce.*
3. ____ To schedule childcare, check with point person regarding availability
4. ____ Confirm date, time and location with all parties

TIPS:

- Keep Jennifer updated with any time/date changes
- If using a tip jar, seed it with some dollars
- Inform pertinent church committees of the event where/when appropriate, for example if there is an overlap of activities at that time

5. Advertising Content: Use the [Standard Format for Describing a Program or Activity on the website \(CLICK HERE\)](#) that you created earlier as a guide to create advertising content in different Church communication outlets.

6. Advertising Plan and Outlets

1. ____ Develop a promotional/advertising plan, for example:

- i. 6-8 weeks ahead of event inform potential attendees
 - ii. 4-6 weeks ahead, send out a “save the date” and continue to promote event
 - iii. 2-4 weeks ahead send final reminders and encouragement to attend
2. ____ Write blurb(s) for insertion in some or all of communication vehicles listed below:
- 1. Monthly Newsletter *On Common Ground* The third Sunday of the month prior to publication for the newsletter *On Common Ground* (send to newsletter@uuventura.org) as soon as the newsletter is reinstated post-COVID.
 - 2. *UUCV this week* (Thursday email) Due Wednesday at noon, (50 words max, send to Jen Luce)
 - 3. Back of order of service (25 words max, 2-3 weeks before event)
 - 4. Zoom room pre-service scroll of events/announcements (25 words max, 2-3 weeks before event)
 - 5. Announcement for Worship Associate to deliver (2 weeks prior to event)
 - 6. Poster for placement in Berg Hall on appropriate bulletin board and/or easel
 - 7. Coordinate with Kitty Merrill (Publicity Committee) for external publicity in the community publicity@uuventura.org
 - 8. Prepare content about the program or activity to be placed on the Church website using the [Standard Format for Describing a Program or Activity \(CLICK HERE\)](#).

7. Coordinating with the Speaker

- 1. ____ Ask for picture and bio for advertising purposes
- 2. ____ Will they use handouts? (Offer to make copies)
- 3. ____ Will they want to show PowerPoint slides? (Requires working with Brian Fortune see steps under “Logistics” below)
- 4. ____ Do they require an easel? Flip chart pad? Markers?
- 5. ____ Do they want to sell a book or DVD? (Use table for display; ask if assistance in selling the books is required, however, the church does not offer a cashbox)
- 6. ____ Coordinate arrival/departure time, directions to church
- 7. ____ Clarify what reimbursement, if any, is available (this discussion should happen early on so all parties know if there is any possible reimbursement and for what expenses)
- 8. ____ Gather whatever info is needed for you to introduce the speaker to the group

TIPS:

- Consider giving the speaker a packet containing the church newsletter and other background information, including address **as soon as possible**.
- Share with the speaker the description of the activity that is circulating at church, e.g. what is posted on the website
- The process for getting reimbursement of costs is:
 - Determine if the request is reasonable.
 - Complete reimbursement form and attach receipt; forms are in mail slot labeled “Reimbursement Forms”
 - PACT point person returns completed reimbursement form to the PACT for review before it is sent to Jen who cuts the check and sends it to the requestor’s home (Jen cuts checks Friday, signs them Sunday, mails them Monday)

8. Logistics for the Day of Event

Line up people who can help for each of the required actions below:

1. ___ Someone to act as a greeter and guide at the entrance for the speaker and attendees
2. ___ Place a sign on the front door noting the activity
3. ___ Placement of materials such as books authored by speaker at front of church (card tables are in storage room near green room)
4. ___ Audio visual needs (microphone set up and takedown, PowerPoint) This will have already been scheduled a month ahead. You may wish to confirm and go over details with Brian a few days before event.
5. ___ Placement of furniture (small table with water, podium placement, card table for books, a “quiet please” sign in Berg Hall outside the double doors)
6. ___ Set out voluntary tip/appreciation jar to compensate speaker
7. ___ Check AV functions early so the event can start on time with them working
8. ___ Call the session to order; inform the audience where the restrooms and drinking fountains are
9. ___ Introduce speaker and any protocols they want to use, e.g. save questions until after the presentation.
10. ___ Distribution of handouts
11. ___ Place sign on Berg Hall doors when applicable
12. ___ Formally close the session; thank the speaker; invite attendees to contribute to the “appreciate jar” if they enjoyed the presentation.

13. ____ Post event activities:
- i. Ensuring AC and heat are off
 - ii. Kitchen cleaned, trash taken out if appropriate
 - iii. Tidying area and returning furniture to original configuration
 - iv. Storage room locked
 - v. Church closed and secured
 - vi. Report to PACT point person any upsets or unexpected occurrences

TIPS:

- If there are other events taking place in the church at the same time, coordinate with the organizer(s) to minimize confusion.
- A “Quiet Please” sign can be placed at the door to the sanctuary for people to see as they are exiting Berg Hall. Sign is available in entry room next to gong.

9. Follow up (after the event)

1. ____ Follow up with attendees to determine what went well, what did not, and to identify any improvements to be made for the next time
2. ____ Send a handwritten thank you note to guest speaker’s home via snail mail