

Updated: Jan, 2009

**Event Fundraiser Budget worksheet instructions:**

Use the Event Fundraiser Budget worksheet for tracking all Temple fundraising events, or if you are trying to determine the feasibility of recommending a new fundraiser for the temple, your unit, or club.

The format of the planner is a simple Excel spreadsheet.

**For existing Temple fundraisers:**

Unit or club sponsor will use the "Event Fundraiser Budget" to keep track of all income and expenses related to the event.

1. Enter the date of the event, determine this at least 90 days prior to the actual event. Some events that are held annually have already set the date for the next year, and should have reserved space for the next year. Verify this with the sales staff. (The earlier this is set up, the more time you will have to promote the event).
2. If not already done, reserve space at Zuhrah Shrine Center, (if the event will take place there).
  - a. Enter the event number on the form. This will be provided to you from the sales staff at the temple when they enter the event into the catering system. You should set this up with the sales staff, no less than 90 days prior to the event.
3. Complete the name of the event and the name of the club or unit sponsoring the event.
4. Determine projected Revenues that the event will generate.
  - a. Use the blank spaces are on the form for any items that might not be already listed.
5. List all of the expected Expenses for the event.
  - a. Fixed expenses are the hard costs for running the event. Cost of room, food, notices, etc.
  - b. Discretionary expenses are those costs not figured into original budget, like guest/performer meals, transportation expenses.
    - i. May also be used to track any comped or free ticket sales, or worker expenses.
6. The form will calculate out the totals and net income of the event.
  - a. Present the completed event planner to your unit or club for consideration
  - b. Present the completed event planner to the Divan, usually the Marshall for review and approval.
7. Set-up Online payment system
  - a. Inform Zuhrah office at least 90 days ahead of time if you wish to use the On-line payment system to purchase advance tickets.
  - b. Office staff will add event to Online payment system.
  - c. Jane Gross, Temple Receptionist at
    - i. 612-871-2555
    - ii. Jane@Zuhrah.org
  - d. Provide event details:
    - i. Name of event
    - ii. Hosted by
    - iii. Date of event
    - iv. Location
    - v. Time
    - vi. Ticket price
    - vii. Date to close out ticket sales
      1. Usually at least 2 days before event to allow for proper record keeping and pre-sales report.
    - viii. Will tickets be available at the door.
    - ix. Direct how to access online payment system
      1. Zuhrah.Org, Click "Fraternal operations", Click" Pay On-line"