

# PLANNING & PURCHASING PROTOCOLS

2025-26

## 01 PLAN SMART, SPEND SMART.

- **Develop a detailed budget for your programs and events.** Account for all potential costs—including incidentals like gas and volunteer snacks—and set registration fees accordingly to *break even or generate surplus*.
- **Plan ahead.** Avoid last-minute orders and rush fees. For custom orders, give the Communications Team ample time to design and send to vendors. Organize bulk orders through our Facilities team when possible to save on shipping or delivery fees.
- **Inventory your subscriptions and recurring expenses.** Regularly review tools, software, and services to ensure you're actively using what you're paying for.
- **Collaborate when possible.** If your event overlaps with another ministry or team, consider combining efforts to reduce costs and resources.

## 02 PURCHASE APPROVALS AND PROCESS

### Who Can Purchase

- Only designated individuals have access to the Midtown Church corporate credit card.
- Card information should not be shared.
- If you need to make a purchase, coordinate with your department's cardholder. Check with Finance or your supervisor to confirm who that is.

### Approval Process

- Any purchase over \$500 requires approval by Executive Director.
- Email the request to your supervisor and CC: kira.bautista@midtownchurch.org.
- Kira will "reply all" with an official approval.

**MIDTOWNCHURCH.ORG/STAFFRESOURCES**  
FOR FORMS, INSTRUCTIONS, AND MORE.



## 03 HOW TO REPORT PURCHASES

### Receipts must be submitted for all church purchases—no exceptions.

- Cardholders are responsible for submitting receipts on time.
- Email a photo or scanned copy to [kere.romo@midtownchurch.org](mailto:kere.romo@midtownchurch.org) by the 20th of the month.
- Include:
  - Campus
  - Department #
  - Account number
  - Description of purchase
  - For meals: List all attendees
  - *Ex: 70-8380 (lens rental for Christmas service)*

### Reimbursements

- Must be submitted within **30 days** of purchase.
- Use the official reimbursement form and include copies of receipts.
- Submit either as a hard copy to the Finance Office or digitally to [kere.romo@midtownchurch.org](mailto:kere.romo@midtownchurch.org).

## 04 AMAZON ACCOUNTS

- Use Midtown Church's Amazon Business Account to simplify tracking and documentation.
- If you don't have access, contact Merman or Kira to help place your order.
- At checkout, list your Department # and Account Number in the PO Box field.

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## 05 MEETINGS & MEALS

### Volunteers or Congregants

- Meet on-site at church or in the office whenever possible (preferred for both safety and stewardship).
- If meeting off-site, avoid purchasing full meals—opt for coffee or equivalent instead.

### Staff

- For long meetings, encourage staff to bring their own food.
- If it's a celebration or mandatory gathering and you'd like to provide food, get prior approval from your supervisor to expense the meal from your department's budget.

### Events, Classes, and Gatherings

- To keep costs down, offer bulk beverages (such as water, tea, or lemonade in dispensers) instead of individual drinks.
- Provide simple, cost-effective snacks rather than catered or individually packaged items.
- Consult with the Hospitality Team for recommendations. They can offer practical tips and guidance on how to serve well while saving money.



**Every dollar we spend comes from the faithful tithes and offerings of our church family. We are called to steward these resources with wisdom and care, treating each expense as an act of ministry.**

“Now it is required that those who have been given a trust must prove faithful.”  
—1 Corinthians 4:2 (NIV)



## 06 PROMOTING: DIGITAL FIRST!

**Before requesting printed flyers or handouts, consider cost-effective digital alternatives to promote your event or program:**

- Email Blasts to targeted groups
- Social Media Posts & Stories
- Website Event Listings
- Messaging on the Church Center app
- QR Codes linking to signups or info
- Planning Center Messaging for volunteers or attendees

Printed materials can still be used strategically, but digital tools are often faster, cheaper, and more effective for reaching people.

Need help crafting a promo plan? Contact the Communications Team!

## 07 MERCHANDISE GUIDELINES

- Custom merchandise should not be given away by individual ministries.
- If you'd like to offer merch for your event or team, it must be for sale, not free.
- All designs must go through the Communications Team—homemade or self-created merch is not permitted.

### **Why This Matters:**

- Ensures brand consistency across all ministries and campuses
- Maintains a high standard of design and quality
- Prevents duplication or confusion
- Protects the integrity of Midtown's visual identity
- Supports wise stewardship of resources
- The Communications Team will work directly with vendors to resolve any design-related issues.

Interested in merch? Contact Comms. We're happy to help create something that reflects Midtown's mission and style.

### *Who to contact for what:*

*(start here!)*

**Credit card holder for my dept:**

Ask your supervisor, or the Finance office

**Reimbursement or expense reporting:**

Kere Romo, HR & Finance Administrator

**Budget or spending approvals**

Kira Bautista, Executive Director

**Amazon Business purchases:**

Merman Austin, Sac Campus Manager  
Kira Bautista, Executive Director

**Promotions Planning:**

Marissa Mallicoat, Communications Manager

**Planning Center Calendar, Event/Room Requests and Registrations:**

Stephanie Huffman, Database Administrator

**Event Planning and Hospitality Support:**

Taylor Balian, Director of Programming and Events

**Production (Tech Support):**

Daniel Co, Production Director

## 08 EVENT PLANNING CHECKLIST

- Budget approved
- Event added to PCO Calendar, with complete description of WHO, WHAT, WHEN, WHERE, WHY
- Room reservation confirmed
- Tech or facility needs submitted
- Marketing requests submitted to Comms
- Volunteers secured and trained
- Supplies ordered with enough lead time
- Hospitality and security needs confirmed (if applicable)
- Registration form tested (if applicable)

## 09 TIMELINE & LEAD TIME EXPECTATIONS

To set your event up for success, start early and work backwards from your event date. Here are general timeframes to help you plan:

- **8 weeks before the event:** Begin with budget approval and select your event date. This gives time for necessary approvals and logistics.
- **6 weeks before the event:** Submit requests for communications support (merchandise, social media, emails, website, etc.) Request any printed materials or merchandise. Allow extra time for design, revisions, vendor production, and shipping.

## AVOID THESE PLANNING MISSTEPS:



- **Poor planning that leads to unnecessary rush or shipping fees:** Plan ahead to avoid last-minute orders that cost more and create stress.
- **Submitting purchases without prior approval;** Anything over \$500 must be approved—don't skip this step.
- **Forgetting to submit receipts:** Missing receipts delay accurate budgeting and reporting.
- **Using personal funds without a reimbursement plan:** Always check if a purchase can be made with a church card first.
- **Creating your own flyers, shirts, or logos:** All materials must go through the Communications Team to maintain brand consistency.
- **Over-ordering food, merch, or supplies:** Plan based on actual attendance and past trends to avoid waste.
- **Undercharging for events:** Be sure to account for all expenses when setting registration fees. Events should break even or generate surplus to support ministry.

*Thank your for being wise with  
what we've been given.  
Every bit helps with ministry impact!*

