

# Event Planning Worksheet

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## UNCG Partner Schedule:

- ☐ Initial meeting scheduled? (Completed worksheets will be reviewed by SE and campus partner)
  - ☐ Walk -Through Dates?
    - Attendees?
  - ☐ Follow - up meetings? (tastings, menu selection, review of printed materials)
  - ☐ Table seating/Diagram meeting (within 3 days of event)
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## Hotel/Travel:

- ☐ Hotel and travel needed for speakers/presenters/special guests? Confirm hotels are available
    - Hotel and travel contact information (sale manager, travel agent, speaker, speaker's assistant):
    - Hotel and travel details:
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## Agenda/Script:

- ☐ Who's planning the agenda/program? (programs should be no more than an hour)
- ☐ Who's arranging & confirming speakers, presenters, award recipients, etc.?
  - Is the date of the event held on all of their calendars?
- ☐ Who's writing the script?
- ☐ Program Flow:
  - MC
  - Guest Speakers
  - Honorees
  - Q&A?

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**Room/ Locations Reservations:**

- ☐ What rooms and locations are needed for this event (avoid planning the event at the same time as other events)?
  - ☐ Reserve rooms and locations with campus/off campus contacts (see contact list for assistance)
  - ☐ Consider limitations of rooms/locations and create backup plans (inclement weather, time of year, other events taking place at the same time, room/location capacity, budgetary restraints, lack of parking, lack of kitchen/restrooms facilities, lack of electricity, etc.)
  - ☐ Confirm details communicated to room/location contact at least 14 days out of confirmed week of event.
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**Invitation Design/Production:**

- ☐ Quantity needed:
- ☐ Design (Include valet parking, attire, enclosures, RSVP data, program information, etc.)
  - Who's designing it?
  - Due Date
- ☐ Delivery
  - Mail
  - Email
- ☐ Text
  - Who's writing it?
  - Due Date
- ☐ Invite List
  - Who's doing it?
  - Due Date
- ☐ Drop Date:
- ☐ Addressing
- ☐ Printed/handwritten

- ☐ Directional maps needed?
- ☐ Stuffing
- ☐ Postage
- ☐ RSVPs
  - Who's taking them?
  - Cut off date?
  - Follow up with non-responders?

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**Printed Program:**

- ☐ Design
  - Who's doing it?
  - Due date
- ☐ Text
  - Who's writing it?
  - Due date
- ☐ Who approves final proof?
- ☐ Where are programs delivered?
- ☐ How are programs distributed at event? (name tag/check in table, greeters/ushers, at place settings, etc)

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**Caterer:**

- ☐ Approximate cost per person:
- ☐ Menu Type: plated or buffet, hors d'oeuvres(light, heavy, passed, buffet, combo), action stations, dessert, high end or moderate(avoid pre-set items that will look wilted and worn out by the time the guests are seated)
- ☐ Special requests: vegetarian, pescatarian, food allergies, preferences
- ☐ Setup date, time and location (do you need access to the space early?)
- ☐ Diagram created of event setup and table configuration(number of tables and chairs needed)

- ☐ Logistics: off site location, distance from kitchen, mobile kitchen needed, tent, weather, etc.
  - ☐ Any rentals needed by caterers? (tables, serving pieces, china, glassware, etc.)
  - ☐ Service details: expectations, timing, program details (serving during program?), event flow, items provided by University Events (menu cards, place cards, table numbers, table stanchions, etc.) items provided by caterer, etc.
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**Bar:**

- ☐ Order Alcohol
- ☐ Bar Details:
  - Full Bar
  - Wine and Beer
  - Signature drink
  - Champagne Toast
  - After dinner cordials served with coffee
- ☐ Service Details:
  - Bar setup on site
  - Wine/signature drinks passed?
  - Wine and beer served with dinner?
  - Toasts taking place before, during, after dinner?
  - After dinner drinks served?
- ☐ Number of bars needed(based on number of guests):
- ☐ Setup location of bar(s)
- ☐ Special requests:
- ☐ Timing:
  - How long is the bar open?
  - Is there a definite reception time?
  - Will the bar close once dinner begins
  - Will you close the bar before the end of the event
- ☐ Security/Permits Needed:
  - Are students attending this event?
    - Will students that are of age be allowed to consume alcohol?
  - Is this event in a common area?
  - Is extra security required to secure this area?
  - Will there be a need to check Identification?
  - Complete ABC permit with Carolyn Coppedge in the legal office

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**Florist:**

Name:

Primary Contact:

- ☐ Delivery date & time
- ☐ Pick up date & time
- ☐ Table centerpieces: # needed
- ☐ Buffet/registration/cocktail arrangements: # needed
- ☐ Stage/Podium arrangements: # needed
- ☐ Additional decor needed:
- ☐ Discuss any preference with the florist before the event; color schemes, height of arrangements, no flowers with overpowering scents, etc.

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**Decor:**

- ☐ Trees/plants/greenery around podium
- ☐ Signage
- ☐ Props/balloons/baskets

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**Media:**

- ☐ Number attending
- ☐ Time
- ☐ Who will coordinate their needs?
- ☐ Special requests for Facilities or Parking Services (electricity, spaces reserved, etc.)
- ☐ Special food/beverage requests

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**Audio/Visual:**

Name:

Primary Contact:

- ☐ Delivery date & time

- ☐ Delivery location
  - ☐ Pick up date & time
  - ☐ On-site audio/visual technician needed? How long?
  - ☐ Microphones?
    - Number needed?
    - Type (wireless, handheld, on podium, lavalier)
  - ☐ Sound System
  - ☐ LCD Projector and Screen(s)
  - ☐ Laptop/VCR/DVD player
  - ☐ Lighting/piping in music/other
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**Photographer/ Videographer:**

- ☐ Photographer or videographer needed? University or other?
    - Number of photographers needed:
    - Time in
    - Time out
  - ☐ CDs or prints needed? Due date:
  - ☐ Special requests or particular shorts needed:
  - ☐ Confirmed at least 1 month out and week of event
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**Rentals:**

Name:

Primary Contact:

- ☐ Delivery date & time:
  - ☐ Pick up date & time:
  - ☐ Assistance needed by Facilities
  - ☐ Items needed:
    - Tables
    - Chairs
    - Linen
    - China
    - Stage/risers/podium(steps, skirting)
    - Coat Racks
    - Screens/partitions/pipe & drape/easels
    - Heating/cooling
    - Tents
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**Parking:**

- ☐ Parking Deck reserved
- ☐ VIP Spaces reserved (How many needed)?
- ☐ Exit passes

- ☐ Signage from parking deck to event
- ☐ Valet parking offered?
- ☐ Shuttles needed and requested through POCOM

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**Facilities/Work Order:**

- ☐ Work order distribution list:
  - Electrical needs
  - Golf cart needed
  - Trash cans/recycling receptacles
- ☐ Services:
  - Furniture Pickup/moving
  - Hang banner on campus
  - Pressure wash
  - Pre-event clean up
  - Post-event clean up
  - Custodial

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**Entertainment:**

Name:

Primary Contact:

- ☐ Start time
- ☐ End time
- ☐ Speakers/presenters in program:
- ☐ Entertainment?
- ☐ Discuss program with speakers/presenters and confirm their needs:(a/v, remarks, materials, timing, etc.)
- ☐ Arrange for water at the podium
- ☐ Check requests for performers (usually BANCPS form)

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**Chancellor/Provost Protocols:**

- ☐ Confirm event attendance with Chancellor's Office and Provost's Office
- ☐ Briefing document created and distributed
- ☐ Green room reserved for Chancellor/Provost

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**Staffing/Volunteers:**

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|---|----------|
| <input type="checkbox"/> Nametag/check in | # needed |
| <input type="checkbox"/> Cart driver(s)   | # needed |
| <input type="checkbox"/> Greeters/ushers  | # needed |
| <input type="checkbox"/> Floaters         | # needed |

- ☐ Volunteers/staff/student groups contacted about event and attendance confirmed
  - ☐ Event assignments created and distributed no later than 72 prior to event. Provide on site event contact to volunteers/staff/student groups
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#### **Check in/Registration:**

- ☐ Location:
  - ☐ Items needed at table:
    - Nametags
    - Master attendee list/seating assignments/table assignment list
    - Black labels, sharpies, extra nametag holders, baskets
    - Optional centerpiece
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#### **Signage:**

- ☐ Welcome/Check in
  - ☐ Parking/directional
  - ☐ Assigned/Reserved seating
  - ☐ Table numbers
  - ☐ Restrooms
  - ☐ Reserved/Media/Chancellor/Award Winners/Provost
  - ☐ Private event
  - ☐ Cell phone, no photography, etc.
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#### **Handouts/Gifts/Awards:**

- ☐ Favors for guests
  - How many?
  - How will they be distributed?
- ☐ Gifts or awards for honorees/special guests
  - How many?
  - Cost per gifts?
  - How to preset in the program?

#### **Post-Event:**

- ☐ Get photos from photographer; distribute photos as needed
- ☐ Update RSVP sheets with actual attendees
- ☐ Return any rentals
- ☐ Invoicing for all vendors
- ☐ Return all non-sendable invitations to UA Services
- ☐ Send thank you notes or emails to staff/volunteers, vendors, honorees, etc.
- ☐ Take note of any changes to make for the next year, if a recurring event



