

Event Planning Worksheet

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?

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.

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

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.

Decor:

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

Media:

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

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:

- Nametag/check in # needed
- Cart driver(s) # needed
- Greeters/ushers # needed
- 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 present 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

