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)

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:

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?

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)

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, lavaliere)

Sound System
LCD Projector and Screen(s)
Laptop/VCR/DVD player
Lighting/piping in music/other

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

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

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

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

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)

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

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 preset in the program?

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**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