

## checklist

## Budget Planning Checklist

Event name: \_\_\_\_\_

Purpose of the Event: \_\_\_\_\_

Event Date: \_\_\_\_\_

Start time: \_\_\_\_\_:\_\_\_\_\_ End time: \_\_\_\_\_:\_\_\_\_\_

No. of Attendees: \_\_\_\_\_

Budget: \_\_\_\_\_

## Event Facilities

**1st Preference:**

Facility Name: \_\_\_\_\_

Dates available:

1] \_\_\_\_\_ - \_\_\_\_\_ - 2008

2] \_\_\_\_\_ - \_\_\_\_\_ - 2008

3] \_\_\_\_\_ - \_\_\_\_\_ - 2008

Room Size: \_\_\_\_\_

Room Rental Rate: \$ \_\_\_\_\_.

**PARKING RATE:**Valet: \$ \_\_\_\_\_ Per  hour  daySelf: \$ \_\_\_\_\_ Per  hour  day Free Parking**3rd Preference:**

Facility Name: \_\_\_\_\_

Dates available:

1] \_\_\_\_\_ - \_\_\_\_\_ - 2008

2] \_\_\_\_\_ - \_\_\_\_\_ - 2008

3] \_\_\_\_\_ - \_\_\_\_\_ - 2008

Room Size: \_\_\_\_\_

Room Rental Rate: \$ \_\_\_\_\_.

**PARKING RATE:**Valet: \$ \_\_\_\_\_ Per  hour  daySelf: \$ \_\_\_\_\_ Per  hour  day Free Parking**2nd Preference:**

Facility Name: \_\_\_\_\_

Dates available:

1] \_\_\_\_\_ - \_\_\_\_\_ - 2008

2] \_\_\_\_\_ - \_\_\_\_\_ - 2008

3] \_\_\_\_\_ - \_\_\_\_\_ - 2008

Room Size: \_\_\_\_\_

Room Rental Rate: \$ \_\_\_\_\_.

**PARKING RATE:**Valet: \$ \_\_\_\_\_ Per  hour  daySelf: \$ \_\_\_\_\_ Per  hour  day Free Parking**4th Preference:**

Facility Name: \_\_\_\_\_

Dates available:

1] \_\_\_\_\_ - \_\_\_\_\_ - 2008

2] \_\_\_\_\_ - \_\_\_\_\_ - 2008

3] \_\_\_\_\_ - \_\_\_\_\_ - 2008

Room Size: \_\_\_\_\_

Room Rental Rate: \$ \_\_\_\_\_.

**PARKING RATE:**Valet: \$ \_\_\_\_\_ Per  hour  daySelf: \$ \_\_\_\_\_ Per  hour  day Free Parking

## Hotels

### 1st Preference:

Hotel Name: \_\_\_\_\_  
 Number of Rooms Available: \_\_\_\_\_  
 Room Rate: \$ \_\_\_\_\_  
 Number of Suites Available: \_\_\_\_\_  
 Suite Rate: \$ \_\_\_\_\_  
 Arrival Date: \_\_\_\_\_ - \_\_\_\_\_ - 2008  
 Departure Date: \_\_\_\_\_ - \_\_\_\_\_ - 2008  
 Payment Type: \_\_\_\_\_

#### PARKING RATE:

Valet: \$ \_\_\_\_\_ Per  hour  day  
 Self: \$ \_\_\_\_\_ Per  hour  day  
 Free Parking

### 2nd Preference:

Hotel Name: \_\_\_\_\_  
 Number of Rooms Available: \_\_\_\_\_  
 Room Rate: \$ \_\_\_\_\_  
 Number of Suites Available: \_\_\_\_\_  
 Suite Rate: \$ \_\_\_\_\_  
 Arrival Date: \_\_\_\_\_ - \_\_\_\_\_ - 2008  
 Departure Date: \_\_\_\_\_ - \_\_\_\_\_ - 2008  
 Payment Type: \_\_\_\_\_

#### PARKING RATE:

Valet: \$ \_\_\_\_\_ Per  hour  day  
 Self: \$ \_\_\_\_\_ Per  hour  day  
 Free Parking

## Room Set-Up:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Classroom Seating  | <input type="checkbox"/> Theater Seating | <input type="checkbox"/> Chevron Seating       |
| <input type="checkbox"/> Conference Seating | <input type="checkbox"/> U-Shape Seating | <input type="checkbox"/> Hollow Square Seating |
| <input type="checkbox"/> T-Shape Seating    | <input type="checkbox"/> Banquet Seating | <input type="checkbox"/> Crescent Seating      |

## VIP(s) and Special Guests:

No. of VIP(s): \_\_\_\_\_ No. Guest(s): \_\_\_\_\_ No. of VIP Tables: \_\_\_\_\_

Separate Tables:  Yes  No

## Food service:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- |   |   |
|---|---|
| <input type="checkbox"/> American Service<br><small>[Cooked and plated in kitchen]</small>                        | <input type="checkbox"/> French Service<br><small>[3 Course, 1 already on the table]</small>                        |
| <input type="checkbox"/> Russian Service<br><small>[Guests serve themselves off platters held by butlers]</small> | <input type="checkbox"/> Family Style<br><small>[Platters brought to the table and people serve themselves]</small> |
| <input type="checkbox"/> Buffet   | <input type="checkbox"/> Cocktails  |

<input type="checkbox"/> Tables .....\$ _____	<input type="checkbox"/> Chairs .....\$ _____	<input type="checkbox"/> Dishes .....\$ _____
<input type="checkbox"/> Glassware ..\$ _____	<input type="checkbox"/> Cutlery .....\$ _____	<input type="checkbox"/> Linen .....\$ _____
<input type="checkbox"/> Vases .....\$ _____	<input type="checkbox"/> Servers .....\$ _____	<input type="checkbox"/> Bartenders ..\$ _____

## Special Menu Request(s):

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Kosher .....\$ _____  | <input type="checkbox"/> Vegetarian ..\$ _____  | <input type="checkbox"/> Vegan .....\$ _____    |
| <input type="checkbox"/> Organic .....\$ _____ | <input type="checkbox"/> Diabetic .....\$ _____ | <input type="checkbox"/> Soy Free .....\$ _____ |
| <input type="checkbox"/> Low Fat .....\$ _____ | <input type="checkbox"/> Low Sodium \$ _____    | <input type="checkbox"/> Lactose Free..\$ _____ |

## Beverage Service:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Coffee .....\$ _____   | <input type="checkbox"/> Tea .....\$ _____    | <input type="checkbox"/> Sodas .....\$ _____  |
| <input type="checkbox"/> Bottled Water \$ _____ | <input type="checkbox"/> Wine/Beer ..\$ _____ | <input type="checkbox"/> Liquor .....\$ _____ |

Supporting Staff:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- Caterer .....\$ \_\_\_\_\_
- Mover(s) .....\$ \_\_\_\_\_
- Clean-Up Staff .....\$ \_\_\_\_\_
- Music .....\$ \_\_\_\_\_
- Coat-Check Attendants .....\$ \_\_\_\_\_
- Presenter .....\$ \_\_\_\_\_
- Courier(s) .....\$ \_\_\_\_\_
- Press Writer(s).....\$ \_\_\_\_\_
- Decorator .....\$ \_\_\_\_\_
- Security .....\$ \_\_\_\_\_
- Floor Manager(s) .....\$ \_\_\_\_\_
- Speaker(s).....\$ \_\_\_\_\_
- Florist Decorator .....\$ \_\_\_\_\_
- Translation & Interpretation ..\$ \_\_\_\_\_
- Lighting .....\$ \_\_\_\_\_
- Valet Staff.....\$ \_\_\_\_\_
- Meeting Planner .....\$ \_\_\_\_\_
- Video .....\$ \_\_\_\_\_

Audio and Visual:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- Photographer.....\$ \_\_\_\_\_
- AV Specialist .....\$ \_\_\_\_\_
- Screens.....\$ \_\_\_\_\_
- Lectern .....\$ \_\_\_\_\_
- Presentation equipment .....\$ \_\_\_\_\_
- Microphones .....\$ \_\_\_\_\_

Necessities:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- Awards .....\$ \_\_\_\_\_
- Menu Cards .....\$ \_\_\_\_\_
- Corporate Giveaways .....\$ \_\_\_\_\_
- Nametags .....\$ \_\_\_\_\_
- Directional Signs .....\$ \_\_\_\_\_
- Permits.....\$ \_\_\_\_\_
- Envelopes and Postage .....\$ \_\_\_\_\_
- Petty Cash to Pay Vendors....\$ \_\_\_\_\_
- Event Programs .....\$ \_\_\_\_\_
- Place Cards .....\$ \_\_\_\_\_
- Flip Charts and Markers.....\$ \_\_\_\_\_
- Press Kits .....\$ \_\_\_\_\_
- Guest List.....\$ \_\_\_\_\_
- Programs .....\$ \_\_\_\_\_
- Insurance .....\$ \_\_\_\_\_
- Storage Area .....\$ \_\_\_\_\_
- Invitations .....\$ \_\_\_\_\_
- Table Numbers.....\$ \_\_\_\_\_
- Labels .....\$ \_\_\_\_\_
- Table Stands.....\$ \_\_\_\_\_
- List With Staff Responsibilities \$ \_\_\_\_\_
- Thank You Letters .....\$ \_\_\_\_\_
- Media List .....\$ \_\_\_\_\_

Transportation:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- Shuttle Service .....\$ \_\_\_\_\_
- Taxi.....\$ \_\_\_\_\_
- Limousine.....\$ \_\_\_\_\_
- Car .....\$ \_\_\_\_\_

Registration area set-up:

Budget: \$ \_\_\_\_\_

Cost: \$ \_\_\_\_\_

- No. of tables: \_\_\_\_\_ \$ \_\_\_\_\_
- No. of chairs: \_\_\_\_\_ \$ \_\_\_\_\_
- No. of easels: \_\_\_\_\_ \$ \_\_\_\_\_
- No. of wastebaskets: \_\_\_\_\_ \$ \_\_\_\_\_
- Electrical access: \_\_\_\_\_ \$ \_\_\_\_\_
- No. of Phone Connections: \_\_\_\_\_ \$ \_\_\_\_\_

## Notes

Remark 1: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remark 2: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remark 3: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remark 4: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remark 5: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remark 6: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_