EVENT WORKSHEETS

WFU PARTNER SCHEDULE:

- Initial meeting scheduled? (completed worksheets will be reviewed by UE and campus partner)
- Walk-through date?
  - Attendees
- Follow-up meetings? (tasting, 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 (not during furniture market or other high demand times)
  - Hotel and travel contact information (sales manager, travel agent, speaker, speaker’s assistant):
  - Hotel and travel details:

AGENDA/SCRIPT:

- Who’s planning the agenda/program? (program 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?
- Things to remember when planning the program:
  - The program should have broad appeal- the best programs hit you in the heart and the mind.
  - Blend the messages that your guests/donors NEED to hear with what they want to hear.
  - A dinner program should be no longer than an hour’s worth of material.
  - Customize the program to showcase administrators and dean in their best light.
  - Prepare the speakers/presenters ahead of time. Create a briefing document with the message you need them to deliver, timeframe for their presentation, the overall flow of the program, set-up on stage/podium, etc. Brief them the week of the event and again at the event.
  - Always vet guest speakers first…you don’t want to be surprised at the event! Schedule a meeting with the proposed speaker(s) and review their remarks.
  - Exceptional and interesting students always enhance a program.
  - Only put things on the program that makes sense- if there is no natural reason to include something or some group, but don’t add it to the program just to be different.

ROOM/LOCATIONS RESERVATIONS:

- What rooms and locations are needed for this event? (Avoid planning the event at the same time as other events. For example, Board of Trustees meetings have first choice on all campus spaces and parking.)
- Reserve rooms and locations with campus/off-campus contacts (see contact list for assistance)

- Consider limitations of rooms/locations and create back-up plans (inclement weather, time of year, other events taking place at the same time, room/location capacity, budgetary restraints, lack of kitchen/restroom facilities, lack of parking, lack of electricity, etc.)

- If Wait Chapel or Scales Recital Hall are used for event, contact Jay Lawson about sound needs

- Confirm details communicated to room/location contact at least 14 days out and confirmed week of event

INVITATION DESIGN/PRODUCTION:

- Quantity needed

- Design (Include valet parking, attire, enclosures, RSVP data, program information, etc.)
  - Who’s doing it?
  - Due date

- Text
  - Who’s writing it?
  - Due date

- List/labels
  - Who’s doing it?
  - Due date

- Drop date

- Addressing
  - Calligraphy/hand written
  - Laser printing/Excalibur spray
  - Labels

- 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? (nametag/check-in table, greeters/ushers, at place settings, etc.)

CATERER:

Name: ____________________________ Primary contact: ____________________________

Approximate cost per person (all inclusive): ____________________________ Tasting (?)/Date: ____________________________

- 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/food allergies/preferences
- Set-up date, time & location (do you need access to the space early?)
- Podium needed in green room and/or magnolia room
- Diagram created of event set-up and table configuration (number of tables and chairs needed)
- Logistics: off-site location, distance from kitchen, mobile kitchen needed, tent, weather (discuss rain/inclement weather plan), etc.
- Any rentals needed by caterer? (tables, serving pieces, china, glassware, etc.)
- Service details to discuss with caterer: expectations, timing, program details (serving during program?), event flow, items provided by UE/university partner (menu cards, place cards, table numbers, table stanchions, etc.), items provided by caterer, etc.
- Are there items that need to be served or not served because of a guest, presenter, or sponsor of your event? For example: Pepsi, Frito Lay, Primo Water, Krispy Kreme, etc. Alert your caterer of these needs in advance.

BAR:

Provided by caterer?: ____________________________ Primary contact: ____________________________

Hosted or cash bar: ____________________________ Cost per person (all inclusive): ____________________________

- Bar details:
  - Full bar (liquor, wine and beer)
  - Wine and beer only
  - Signature drink?
  - Champagne toast?
  - After dinner cordials served with coffee?

- Service details:
  - Bar set-up on site
  - Wine/signature drinks butler passed?
  - Mixed drinks served during dinner?
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):
- Set-up location of bar(s):
- Special requests: call or top shelf brands? Certain types or brands of liquor?
- 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 for security/safety reasons?
- Security/Permits Needed:
  - Are students attending this event?
  - Is this event in a common area?
  - Is extra security required to secure this area?
  - Will there be a need to check identification?
  - Are any special permits needed to serve alcohol in this area?

---

**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 from UE (mirrored tiles, hurricane candle holders, votive candle holders, tea lights, etc.)
- Diagram provided?
- Discuss any preferences with the florist before the event; for example: color schemes, height of arrangements (not blocking guests or hindering conversations), no flowers with overpowering scents, etc.

---

**DÉCOR:**

- Trees/plants/greenery around podium
- Specialty signage
- Props/balloons/baskets

---

**MEDIA:**

- Number attending
• Time in
• Time out
• Who will coordinate their needs?
• Special requests for Facilities or Parking Services (electricity, yellow jackets, spaces reserved, etc.)
• Special food/beverage requests (soda, bottled water, food, boxed lunches, etc.)

AUDIO / VISUAL:

Name: ___________________________________________ Primary contact: ________________________________

• Delivery date & time
• Delivery location
• Pick-up date & time
• On-site audio/visual technician needed? How long? Cost?
• Microphones
  o Number needed
  o Type (wireless, handheld, on podium, lavaliere)
• Sound system
• LCD Projector and Screen(s)
• VCR/DVD Player/CD Player/Laptop
  o Format (DVD/CD/Beta SP/Mini-DV) or
  o PowerPoint presentation
• Webcast/live feed
• Lighting/piping in music/other

PHOTOGRAPHER / VIDEOGRAPHER:

• Photographer or videographer needed? University or other? If other, list contact info below:
  o Number of photographers needed:
  o Time in
  o Time out
• CDs or prints needed? Due date?
• Special requests or particular shots needed:
• Confirmed at least 1 month out and week of event

RENTALS:

Name: ___________________________________________ Primary Contact: ________________________________

• Delivery date & time
• Pick-up date & time
- Diagram provided?
- Assistance needed by Facilities? (include in work order)
- Items needed:
  - Tables (rounds, hi boys, buffet, bars, serpentine, classroom, etc.)
  - Chairs (plastic or wooden folding, wedding, chiavari, etc.)
  - Linen (specialty or regular)
  - China
  - Stage/riser/podium (steps and/or skirting)
  - Coat rack(s)
  - Caterer/kitchen needs
  - Screens/partitions/pip & drape/easels
  - Heating/cooling
  - Tenting with or without sides (clear or regular)- must be inspected by fire marshal. Tent must be erected at least 5 days prior to event to allow time for Fire Marshal inspection.
  - Other

**PARKING:**
- Needed on or off-campus?
- Lots reserved?
- Security and work order requests (ropes and ramps on Davis Field) submitted?
- Valet parking offered?
- Shuttles needed and requested through Parking Services?
- Signage needed for parking/shuttles and given to Parking Services?

**FACILITIES/WORK ORDER:**

Work order distribution list (memo format):

Work order submitted online (minimal needs):

Date submitted:
- Electrical needs:
- Golf cart needed?
- Barricades/fencing/ramps/ropes on Davis Field
- Assistance with event set-up: tables, chairs, podium, etc.
- Trash cans/recycling receptacles
- Services
  - Furniture pick-up/moving
  - Hang banner on campus?
  - Curtains put-up in Wait Chapel
  - Pressure wash
- Pre-event clean-up
- Post-event clean-up
- Irrigation on/off
- Custodial (restrooms cleaned and stocked)

- Other

---

**ENTERTAINMENT/PROGRAM:**

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.)
- Discuss event with entertainers and confirm needs: (break times, electrical, set-up, a/v, volume concerns, etc.)
- Arrange for water at podium

---

**PRESIDENT/PROVOST PROTOCOL:**

- Confirmed event attendance with President’s and Provost’s Office
- Briefing document created and distributed

---

**SECURITY:**

- Number of officers needed:
- Location
- Time/date

---

**STAFFING/VOLUNTEERS:**

- Nametag/check-in # needed
- Cart driver(s) # needed
- Greeter(s)/ushers # needed
- Floaters # needed
- Coat check # needed
- VIP escort(s) # needed
- Volunteers/staff/student groups (President’s Aides) contacted about event and attendance confirmed
- Event assignments created and distributed no later than 72 hours prior to event. Provide on-site event contact to volunteers/staff/student groups

CHECK-IN/REGISTRATION:

- Location:
- Staffing hours:
- Items needed at table:
  - Nametags (pre-printed or blank): Names only? Titles? Departments? Class year? Distinctions? Are table assignments printed on the nametags?
  - Registration packets/tickets: Collateral included? Who is responsible for creating collateral? Who is responsible for organizing and stuffing packets? Will they be picked up on site or mailed prior to the event?
  - Programs/itineraries: At check-in, distributed by greeters/ushers or at each place setting?
  - Favors: At check-in, distributed by greeters/ushers or at each place setting?
  - Master attendee list/seating assignments/table assignments list
  - Nametag maker, sharpies, extra nametags, baskets or waste baskets, counters, etc.

SIGNAGE:

- Welcome/Check-In
- Parking/directional/balcony closed
- Assigned/Reserved seating
- Table numbers
- Restrooms
- Reserved/Media/Hatch/Award winners
- Private event
- Cell phone, no photography, etc.
- Other
HANDOUTS / GIFTS / AWARDS:

- Favors for guests
  - How many?  
  - Who will order? 
  - How will they be distributed?

- Gifts or awards for honorees/special guests
  - How many?
  - Cost per gift
  - Who will order?
  - How to present in the program?