



EVENT PLANNING CHECK LIST

BASIC NEEDS:

- Site Inspection (*you should always do a walk through of the space before signing off if you can*)
- Venue Type (*hotel, conference center, restaurant, event space, office?*)
- Contact Info (*main point of contact on site*)
- Venue Availability (*are they available for the dates you need?*)

SITE SPECIFICS:

- Is there any upcoming construction planned? If so when? (*will it impact your event date?*)
- Cancellation policy (*What is the venue's policy in regards to your contract?*)
- Attrition penalty (*important to look into so you don't owe anything when event is completed*)
- Deposit amount and due date (*make sure you track this on a sheet so you know important dates, it is all specified in your contract*)
- Neighborhood (*what's around for attendees to explore if they have free time?*)
- Building appearance (*does it look like it should from their online gallery when you see it in person?*)

EVENT LOGISTICS:

- Nearest airport & distance from venue (*must only be 30mins max for ease of attendees*)
- Nearest hotel (*if venue is not a hotel, distance from the venue for attendees to prepare*)
- Parking fees (*is it valet only, do they comp parking within the contract?*)
- Freeway accessibility (*how close is it to main highways and freeways?*)
- Directional signage (*on site, how easy are you able to find your way around? Is signage clear?*)
- Recreational services available (*are there gyms on site, spas, or other special services?*)

FOOD & BEVERAGE:

- Availability and/or cost for each of the following is important to know since all contracts typically have a F&B min. that is required and if you don't meet it, attrition will be requested in your final bill. (*See if you can negotiate as low as possible with your F&B min.*)
 - o Continental breakfast
 - o Full breakfast
 - o Lunch
 - o Dinner

- Coffee (per gallon) – *important since people can power through these quickly and it can cost you a lot depending on the venue and their pricing per gallon.*
- Service charge
- Tax rate
- Guarantees needed by *(part of the important date checklist you should create)*
- Overset guarantee by (%) – *if you have a buffet set for meals, most hotels will pad your food up to 10% more in terms of quantity. So if you are planning for 100, you can ask what the overset guarantee is by % to figure out if you should only order for a headcount of 75. Kitchens need this info in advance since it's harder to make mass quantities of food when serving so the guarantee date is important.*
- Special packages – *some locations have F&B special packages that you can use that cover lots of items, instead of an itemized order.*

AUDIO & VISUAL:

- Equipment provided *(what are you providing vs. needing to order from their team, you can save a lot of \$ when you bring your own, but you must check with the venue to see if they charge you extra for bringing in your own gear etc.)*
- Equipment quality
- Equipment availability *(what do they have on site that you can use during your event dates)*
- Rental rates – important to know in advance for the quote and sign off on contract
- Labor rates – Also important since this is a cost that is usually included within your quote, but make sure it's stated in the contract you sign

ADDITIONAL CHECKLIST ITEMS FOR MEETING ROOMS SPECIFICALLY:

- Space availability
- Room rental charge *(sometimes it's not automatically free and they will charge you)*
- Set-up charges
- Cleanliness *(make sure this space is comfortable and clean for your team and attendees)*
- Soundproofing *(are you speaking about confidential info? Make sure the dividing walls or doors are secure, the hotel or venue can tell you the truth per room type)*
- Décor *(will you use an outside vendor to decorate your space? Is there a fee to have them there to set up in advance? What does the venue need to know prior to you signing a contract with the decorating company?)*
- Ceiling height *(in terms of seeing if the space feels open enough for your attendees)*
- Lighting *(important, everyone has different eye abilities, make sure you're covering it)*
- Temperature control *(let your attendees know to bring extra layers, as sometimes venues and hotels cannot control specific rooms as their heating and AC units are connected to the entire hotel as a whole per floor etc.), but if you do have control be sure to ask how to operate it within the room itself.*
- Sound system *(for presentations, depending on the size of your group is important so everyone can hear from every seat in the house)*
- Presentation equipment *(are you renting theirs, or bringing your own? Know before you go)*

- Number of elevators and proximity to space (*not everyone can access the event space by foot, be sure that you're accommodating all those who may need extra help and easy access into and out of the space*).
- Nearest restroom proximity (*very important, do not make attendees go far for this ever*)
- Nearest restroom cleanliness
- Catering availability (*last minute needs? Make sure the venue is prepared for additional on site needs as needed and make a plan for it with direct contact info and access to teams*)

ADDITIONAL CHECKLIST ITEMS FOR HOTELS –

- **Transportation**
 - Is complimentary transportation to/from the nearest hotel and/or airport available?
 - Approximate taxi fare from the nearest hotel and/or airport
 - Room overview
 - Total number of sleeping rooms (*be conservative with your room numbers so you don't deal with room block attrition*).
 - Total number of suites
 - Rooms with king beds
 - Rooms with queen beds
 - Rooms with 2 double beds
 - Rooms with twin beds
 - % non-smoking rooms
 - Rack rate for singles, doubles, and suites
 - Group rate for singles, doubles, and suites
 - Complimentary rooms available
 - Room tax rate
 - Additional tax per room per night, if applicable
 - Room block by day (*list each date and corresponding number of rooms*)
 - Cut-off date
 - Are rates available after cut-off date? Important to know as attendees tend to wait until the last minute and then are upset that the block is sold out, or the room block is cut off. Speak with the venue ahead of time to ask if you can roll over specific names to the room block after the cut off (*in case they can help prevent you from having to pay off a % of attrition from the room set ups*).
- **Room details**
 - Proximity to meeting space
 - Décor
 - Cleanliness & appearance
 - Square footage of each room type
 - General amenities
 - Bathroom conditions & cleanliness
 - Is there a workspace or desk available inside rooms?
 - Is there a sitting area available inside rooms?

- **Number of restaurants in hotel**
 - Number of lounges in hotel
 - Rate each of the following on a 5 point scale (*1 being the worst, 5 being the best so that there are options*):
 - Lobby
 - Décor
 - Seating
 - Cleanliness
 - Location
 - Public restroom proximity
 - Public restroom cleanliness
 - Security
 - Fire safety
 - Handicap accessibility

ADDITIONAL QUESTIONS TO ASK:

- How late can events run?
- What is the max capacity for each room?
- What permits are required for events? (*if needed*)
- Are there designated areas for storage, green rooms, and or back of house? (*does that cost extra, or is that included within our contract?*)
- What branding opportunities are available inside and outside of the venue? (*get spec sheet with gallery so you can see the display types and costs up front*)

POST SITE INSPECTION WRAP UP:

- Review your visit with your key stakeholders by sharing a summary of your findings with a meeting request
- Hold an in-person meeting to go over details, share your site inspection checklist, and answer any questions your team might have.
 - Schedule a pre-conference call or site visit (*if possible*), about 1 week prior to your event date so that any last minute potential needs are met and you do not scramble towards the end.
- Make decision on whether or not to move forward on the venue together
 - If you have not already signed off on a contract, rule of thumb is to never sign a contract until you have seen the venue in person (*or someone on your team has*). Otherwise the capacity and style of space may not fit your needs and then you're financially obligated to keep the venue and contract.