

EVENT PLANNING & CONTRACT CHECKLIST



Assigned Assistant Director _____ Assigned UPA _____
Event Name _____ Club/Organization _____
Club Representative: _____
Club Representative Phone #: _____ Email: _____
Date of Event ___/___/___ Time ___:___ AM/PM Location _____

ITEM/ RESPONSIBLE	ACTION	STATUS	NOTES
Reflection UPA & AD	<input type="checkbox"/> Discuss purpose, vision & goals of the event with club representative	Meeting Date ___/___/___	
Location UPA & AD	<input type="checkbox"/> Complete Reservation Form (O) & AD will approve/deny it & input reservation online <input type="checkbox"/> Discuss logistics	Spaces Confirmed ___/___/___ Space: _____ UPA Confirms with Group ___/___/___	
Catering UPA	<input type="checkbox"/> Co-Design menu with group. <input type="checkbox"/> Input order into Chartwells online catering system (at least three weeks in advance)	Menu Deadline ___/___/___ Menu Submitted ___/___/___ Order Approved ___/___/___	
Purchases UPA	<input type="checkbox"/> Complete Purchase Request form (B) & send to AD (at least three weeks in advance) <input type="checkbox"/> Include budget information	Form Deadline ___/___/___ Form Submitted to OSD ___/___/___ Arrival Date (of Items) ___/___/___	
Fundraising UPA	<input type="checkbox"/> Complete Fundraising Request Form (J) (at least two weeks in advance) <input type="checkbox"/> Bring money to OSD no later than 24 hours after your event	Form Deadline ___/___/___ Form Submitted to OSD ___/___/___ Money due to OSD ___/___/___	
Performers CLUB REP, UPA, AD, AVP	<input type="checkbox"/> UPA & Club rep will contact vendor/agent, gather info, and fill out Performance Contract Worksheet (K) <input type="checkbox"/> AD will request and receive initial contract, which must be signed by artist/vendor <input type="checkbox"/> Contract edited and	Agency Name: _____ Agency Rep: _____ Initial Contract ___/___/___ Contract Edited & Approved ___/___/___ Contract signed by VP ___/___/___ Contract package sent to agent ___/___/___	

ORIGINAL FORM IS TO BE LEFT IN THE EVENT FOLDER. UPA AND CLUB REP TAKES COPY.

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	approved by AD & AVP <input type="checkbox"/> Contract sent to VP <input type="checkbox"/> Once VP signs contract, contract should be sent to agent	Final initialed contract ___/___/___	
Transportation AD	<input type="checkbox"/> Book buses for event <input type="checkbox"/> Confirm moderator	Buses booked: ___/___/___ Bus Company: _____ Bus contact: _____ Confirmed buses: _____ Confirmed moderator: ___/___/___ Moderator Name: _____ Email: _____ Phone #: _____	
Performer Travel & Hotel (if applicable) AD	<input type="checkbox"/> Travel arrangements <input type="checkbox"/> Hotel Accommodations: Make reservation, confirm reservation, & send agent hotel info and confirmation #	<u>Travel arrangements:</u> _____ <u>Hotel accommodations:</u> Hotel Name: _____ Made Res. _____ Confirmed Res. _____ Confirmation #: _____	
Ticket Sales UPA	<input type="checkbox"/> Complete Ticket Sales Contract (L) Form <input type="checkbox"/> Are physical tickets needed? If so, submit ticket template.	Form Deadline ___/___/___ Form Submitted to OSD ___/___/___ Ticket Template Due ___/___/___ Template Approved ___/___/___	
Publicity UPA & AD	<input type="checkbox"/> Club creates advertisements (be creative) <input type="checkbox"/> Review promotional materials <input type="checkbox"/> Post around campus & on social media (if applicable) <input type="checkbox"/> Send blurb to UPA for "This Week at Iona" <input type="checkbox"/> Bring materials for color copy to Duplicating	Publicity Due to UPA ___/___/___ Publicity Approved by AD ___/___/___ Publicity Removed by ___/___/___ Blub ___/___/___ Duplicating ___/___/___	
Facilities UPA & AD	<input type="checkbox"/> Contact facilities <input type="checkbox"/> Confirm setup & request <input type="checkbox"/> Submit layout (at least three weeks in advance)	Contacted ___/___/___ Confirmed ___/___/___	
Campus Safety AD	<input type="checkbox"/> Contact Security (at least one month in advance) <input type="checkbox"/> Are guests requested? Submit Request for Events with Guests Form (L) <input type="checkbox"/> Group completes guest list with Guest Responsibility Form (Q) at least a week before	Security Contacted ___/___/___ Form Deadline ___/___/___ Form Submitted to CSS ___/___/___	

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Check Request UPA	<input type="checkbox"/> UPA can fill out a Check Request (R)	Check request Sent ___/___/___ Check Received ___/___/___	
Petty Cash/ Reimbursement	<input type="checkbox"/> UPA/Club rep fills out Petty Cash Advance Form (H) and/or Reimbursement Form (I) <input type="checkbox"/> AD fill out Received of Petty Cash Form to be approved by AVP	Receipt Submitted ___/___/___ Cash received ___/___/___	
Check-In UPA & AD	<input type="checkbox"/> Pre-Event Check-In on Event <input type="checkbox"/> Schedule a follow-up meeting	Meeting Date ___/___/___	
Wrap-Up Club Rep, UPA, & AD	<input type="checkbox"/> Wrap-up meeting <input type="checkbox"/> Event Summary Form (N) submitted during mtg) <input type="checkbox"/> Event Budget Summary Form	Meeting Date ___/___/___	

Event Budget Summary

Budget Line: _____ Funding allocated: _____

Additional allocations: _____

Category	Description	Amount

Total Spent: _____

Roll back: _____