EVENT PLANNING & CONTRACT CHECKLIST   **A**

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**	☐ Discuss purpose, vision & goals of the event with club representative	Meeting Date ___/___/_____	
Location **UPA & AD**	☐ Complete **Reservation Form (O)** & AD will approve/deny it & input reservation online ☐ Discuss logistics	Spaces Confirmed ___/___/_____ Space: _____ UPA Confirms with Group___/___/_____	
Catering **UPA**	☐ Co-Design menu with group. ☐ Input order into **Chartwells** online catering system (at least three weeks in advance)	Menu Deadline___/___/_____ Menu Submitted___/___/_____ Order Approved ___/___/_____	
Purchases **UPA**	☐ Complete **Purchase Request form (B)** & send to AD (at least three weeks in advance) ☐ Include budget information	Form Deadline ___/___/_____ Form Submitted to OSD ___/___/_____ Arrival Date (of Items)___/___/_____	
Fundraising **UPA**	☐ Complete **Fundraising Request Form (J)** (at least two weeks in advance) ☐ 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**	☐ UPA & Club rep will contact vendor/agent, gather info, and fill out **Performance Contract Worksheet (K)** ☐ AD will request and receive initial contract, which must be signed by artist/vendor ☐ Contract edited and	Agency Name:_____ Agency Rep: _____ Initial Contract ___/___/_____ Contract Edited & Approved ___/___/___ Contract signed by VP ___/____/____ Contract package sent to agent ____/____/____	

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	approved by AD & AVP ☐ Contract sent to VP ☐ Once VP signs contract, contract should be sent to agent	Final initialed contract ___/____/____	
Transportation **AD**	☐ Book buses for event ☐ Confirm moderator	Buses booked: ___/____/____ Bus Company: _____ Bus contact: _____ Confirmed buses: _____ Confirmed moderator: ____/_____/____ Moderator Name: _____ Email: _____ Phone #: _____	
Performer Travel & Hotel (if applicable) **AD**	☐ Travel arrangements ☐ Hotel Accommodations: Make reservation, confirm reservation, & send agent hotel info and confirmation #	Travel arrangements: _____ Hotel accommodations: Hotel Name: _____ Made Res. _____ Confirmed Res. _____ Confirmation #:_____	
Ticket Sales **UPA**	☐ Complete **Ticket Sales Contract (L)** Form ☐ Are physical tickets needed? If so, submit ticket template.	Form Deadline___/___/_____ Form Submitted to OSD ___/___/_____ Ticket Template Due___/___/_____ Template Approved___/___/_____	
Publicity **UPA & AD**	☐ Club creates advertisements (be creative) ☐ Review promotional materials ☐ Post around campus & on social media (if applicable) ☐ Send blurb to UPA for "This Week at Iona" ☐ Bring materials for color copy to Duplicating	Publicity Due to UPA___/___/_____ Publicity Approved by AD___/___/_____ Publicity Removed by___/___/_____ Blub _____/_____/_____ Duplicating ___/____/____	
Facilities **UPA & AD**	☐ Contact facilities ☐ Confirm setup & request ☐ Submit layout (at least three weeks in advance)	Contacted ___/____/_____ Confirmed ____/____/____	
Campus Safety **AD**	☐ Contact Security (at least one month in advance) ☐ Are guests requested? Submit **Request for Events with Guests Form (L)** ☐ 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**	☐ UPA can fill out a **Check Request (R)**	Check request Sent ___/___/_____ Check Received ___/___/_____	
Petty Cash/ Reimbursement	☐ UPA/Club rep fills out **Petty Cash Advance Form (H)** and/or **Reimbursement Form (I)** ☐ AD fill out **Received of Petty Cash Form** to be approved by AVP	Receipt Submitted ___/___/_____ Cash received _____/_____/_____	
Check-In **UPA & AD**	☐ Pre-Event Check-In on Event ☐ Schedule a follow-up meeting	Meeting Date ___/___/_____	
Wrap-Up **Club Rep, UPA, & AD**	☐ Wrap-up meeting ☐ **Event Summary Form (N)** submitted during mtg) ☐ Event Budget Summary Form	Meeting Date ___/___/_____	

Event Budget Summary

Budget Line: _____   Funding allocated: _____

Additional allocations: _____

Category	Description	Amount

Total Spent: _____   Roll back: _____

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