

# EVENT PLANNER CHECKLIST

Updated 08-26

Please use this suggested timeline and checklist as a reference when preparing for your event.

## 12 Months Out

- ☐ Provide any relevant information (such as preliminary drafts) for the upcoming event or pressure points from previous meetings to discuss with your Event Manager / Coordinator.
- ☐ Review the RCC Event Planner's Handbook. ([www.raleighconvention.com/eventplannershandbook](http://www.raleighconvention.com/eventplannershandbook))

## 9 Months Out

- ☐ Schedule a site visit/planning meeting with your Event Manager/Coordinator.

## 6 Months Out

- ☐ Provide contact information for any potential outside services suppliers that have been contracted for your event to your Event Manager/Coordinator (e.g. Audio Visual Partner, Decorator or Meeting Planner).
- ☐ Review current Rate Sheet.
- ☐ Submit Certificate of Insurance (COI) based upon your license agreement.

## 3 Months Out

- ☐ Submit your anticipated schedule and set-up requirements to your Event Manager/Coordinator for review.
- ☐ Relay potential needs for additional staff (stagehands, riggers, security, fork lift drivers, etc.) with your Event Manager/Coordinator.
- ☐ Discuss sponsor/exhibitor needs, including setup and/or utility requirements, with your Event Manager/Coordinator.
- ☐ Discuss preliminary food needs and review services, policies, and potential deadlines with your Centerplate representative for all food and beverage related items (if applicable).

## 1 Month Out

- ☐ Submit all event details, submit COI (if not yet submitted), and send to your Event Manager/Coordinator for review. (Note: you will be provided with an Event Estimate for your review and approval.)
- ☐ **Payment Deadline: Final rental balance due (refer to your license agreement).**
- ☐ **Payment Deadline: Submit signed contract, Banquet Event Orders (BEO's), and 90% deposit to your Centerplate representative.**

## 1 Week Out

- ☐ Submit final guarantee (guest count) and remaining balance to your Centerplate representative.
- ☐ Return signed Event Estimate and diagrams to your Event Manager/Coordinator.
- ☐ **Payment Deadline: The remaining balance is due (5) business days prior to the event.**

## Post-Event

- ☐ Complete short survey and send final attendance (including all staff, volunteers, and outside service suppliers) to your Event Manager/Coordinator.
- ☐ Review final invoice of incurred event costs upon receipt and submit final payment.