

THE ULTIMATE CHECKLIST

2nd EDITION

J MONROE DESIGNS

JAMES C. MONROE, CMP, CSEP

*3818 Cedar Springs Road
#101-441
Dallas, Texas 75219*

972 296-3336

jim@jcmunroe.com

www.jcmunroe.com

TABLE OF CONTENTS

I.	CONTACT SHEET	1 page
II.	EVENT CHECKLIST	4 page
III.	PRE SITE INSPECTION CHECKLIST	1 page
IV.	EVENT SITE INSPECTION CHECKLIST	4 page
V.	ENTERTAINMENT/PRODUCTION CHECKLIST	6 page
VI.	BRIDE/WEDDING CHECKLIST	9 page
VII.	RISK MANAGEMENT CHECKLIST	5 page

ACKNOWLEDGEMENTS

Concepts and information from the following Special Event Professionals were incorporated into this document: Cheryl Adams, Jayna Monroe of J MONROE DESIGNS; Sheri Pizitz, CMP, CSEP of Events Unlimited (www.eventsunlimited.com) ; Mark Sonder, CSEP, of Mark Sonder Productions (www.marksonderproductions.com) ; Write Style Communications, Ltd. (www.write-style.co.uk), special thanks to M.T. Hickman and the students of the Travel, Exposition and Meeting Management Program of Richland College, Dallas, Texas. Special thanks to Kevin Mellott of ERASE ENTERPRISES LLC for advice and use of Hazard and Threat Classifications concepts and indexing.

LIMITED REPRODUCTION RIGHTS

This is a copyrighted document. Permission is granted to reproduce portions of this publication for purposes of facilitating the personal and professional production of Special Events. Reproduction for other purposes is PROHIBITED without written permission from the compiler/author.

© 2008 James C. Monroe

EVENT CHECKLIST

EVENT _____

Client _____

Contact _____

Phone _____

Cell _____

Fax _____

Email _____

Referral _____

Event Date _____

Event Time _____

Budget _____

EVENT PROFILE

Type _____

Objective _____

Activities to Occur _____

Guest Count _____

ADA Requirements _____

Demographics _____

History _____

FOOD & BEVERAGE

Hors d'oeuvres

Passed

Display

Dinner

Buffet

Seated

Service details (style, # staff, etc.)

Alcohol

Hosted

Cash bar

Details (beer & wine, full bar, premium, etc.) _____

SEATING & TABLES

Percentage seated _____

& Size of tables _____

Guests per table _____

Special Seating/Table Requirements

LOCATION

Venue Contact _____

Move in Time _____

Strike Time _____

Square Footage _____

Ceiling Height _____

Loading Dock/Access Path

Work space _____

 Water Access _____

Crate Storage Space _____

Floor plans

Who does table layout?

Power

Requirements _____

Location _____

Cost _____

ROOMS & TRANSPORTATION

Guest Rooms _____

Meeting Rooms _____

Hospitality Suites _____

Staff/Entertainment Rooms _____

Parking

Guests _____

Staff _____

Trucks _____

Transportation

Bus/ Van _____

Limos/Sedans _____

Other _____

AUDIO/VISUAL

Lighting _____

 Sound _____

 Video _____

DÉCOR & FLORALS

Theme _____

 Entry _____

 Stage _____

 Buffets/Perimeter _____

 Table Treatment _____

- Head (Honoree, Bridal, Special) Table Treatment** _____

- Other (Signage, Check-in, Exhibits, Skirting, Pipe & Drape, Props, etc.)**

Incidental Entertainment (Strolling Musicians, Magicians, Fortune Tellers, Artists, etc.) _____

ENTERTAINMENT

Band _____

- Contact**

- Technical Requirements/ Rider**
- Hospitality/Catering**
- Dressing/ Green Rooms**

DJ _____

Speaker _____

ON SITE MANAGEMENT

- Stage/Production Manager**
- Lighting Director**
- Audio Operator**
- Video Operator/Tech Director**
- Other Key Personnel** _____
- Mixer Board/ Control Central**
- Hospitality/Catering**

PRINTED MATERIALS

- Invitations**
- Name Tags**
- Programs**
- Place Cards**
- Menus**
- Napkins, Cups, etc.**
- Other** _____

RENTALS

- Easels**
- Fans/Heaters**
- China/glassware**
- Linens**
- Plants & Flowers**
- Radios/Communications**
- Tables & chairs**

TENTS

Size(s) _____

Type _____

Flooring _____

Lighting _____

Heating/Cooling _____

SPECIAL SERVICES

- Photography**
 - Documentary** _____
 - Souvenirs** _____
 - Videographer** _____
 - _____
- Paramedics**
- Registration/Coat Check**
- Valet Parkers/Security**
- Translators/Signers**

INSURANCE

Event Insurance _____

Liability Insurance _____

Certificates of Insurance _____

NOTES

PRE-SITE INSPECTION CHECKLIST

The Goal of the Site Inspection is to leave with all of the technical, operational and aesthetic information needed to design and produce the special event you are planning.

First site inspections are generally taken with the client, preferably before a final decision has been made on the site. However, many times the site has been selected before the event manager or designer is hired.

If the site is local, or the event large enough to warrant the cost, a second site inspection may be desirable or even required after the event design has been developed. If possible the event designer may wish to make a site visit alone, for creative purposes.

The following items should be taken on the Site Inspection:

Event Checklist - containing as much information about event as is currently known	
Tape Measure - 3/4" or 1" stiff enough to extend up walls	
Pad & Pencil/pen	
Camera - digital cameras allow easy sharing of images with suppliers	
Site Inspection Checklist*	

The Event Site Inspection Checklist along with the completed or partially completed Event Checklist is the most important element you must take on a site inspection!

EVENT SITE INSPECTION CHECKLIST

EVENT _____

VENUE _____ **VENUE CONTACT** _____

_____ **Phone** _____

_____ **Cell** _____

_____ **Email** _____

Move in Date & Time _____ **Move out Date & Time** _____

Other Venue Players - Banquet/Setup, A/V, Catering Mgr./CSM, Security, Engineering

Name **Position** **Contact Via**

ARRIVAL - Front door _____

Distance - how are guests arriving? _____

Parking - # of spaces, cost, is valet available? _____

First Impressions _____

Guest Access - to event space(s), separate entrance? _____

Registration Area

Coat Check

Rest Rooms - location, size, amenities, flowers/décor needed?

Pre-function Foyer - is there one, reception suitable, secure/private?

Entrance into Event Space - strong or weak impression, does it lend itself to decorating?

ARRIVAL - Back dock

Ease of Access to Dock

Dock Height _____

Truck Parking _____

Security/Dock Control

Dock Supervisor

Access Path to Space **2 OF 4**

Distance _____

Dimensions of *smallest door* into space _____

Elevator Dimensions

Delivery Challenges

ROOM SPECS - get space plan

Floor Plan

Ceiling Plan with Rigging Points

Electrical Plan

Typical Table Layouts

Typical Exhibit booth Layouts

Width & Length of Room (s)

Ceiling Height (s)

Electrical

Location

Size

Cost

Service Access - identify which doors are critical - banquet kitchen location

Storage space

Dressing Rooms

Work Space

Water Access _____

Trash Disposal _____

STAGING - qty. sizes & heights

Steps _____

ADA Ramp _____

CATERING - in-house/off premise

Menus

Specialties

Service Styles

TABLES & CHAIRS

Banquet chairs - take picture

60" rd. _____ **66" rd.** _____

72" rd. _____

8' banquet _____ **6' banquet** _____

Other Tables - school room, 3 OF 4
1/2 rd., cocktail & highboys

Glassware and Flatware

Linens

Typical Amenities - lecterns, easels,
crowd control stanchions, other

AUDIO/VISUAL - in-house

Lighting Capabilities

ENTERTAINMENT PRODUCTION CHECKLIST 1 OF 6

EVENT _____ **DATE & TIMES** _____

VENUE _____ **ROOM/SPACE** _____

ADDRESS _____ **VENUE CONTACT** _____

CELL _____

EMAIL _____

PHONE _____

FAX _____

NAME & DESCRIPTION OF BAND/ACT(S) _____

TECHNICAL CONTACT FOR VENUE _____ **TECHNICAL CONTACT FOR**

_____ **PERFORMER** _____

PRODUCTION TIMES & DATES

Load In _____ **Sound Check** _____

Rehearsal _____ **Doors** _____

Show Times _____ **Breaks** _____

Load Out _____ **Production Script** _____

TECHNICAL REQUIREMENTS

STAGE

_____ wide x _____ deep x _____ high

Onstage Risers required

Backdrop/ Masking Draperies/Decor

AUDIO

Speakers - flown or ground support, front fill, side fill, delays?

Microphones - quantity, style, wireless?

Monitors - monitor mix?

Mixer - where, length of snake, riser, masking?

4 OF 6

Clear Com - how many stations, wireless

Power - amps/voltage/phase, location, cost, who pays

LIGHTING

FOH (Front of House/Front Truss)

Rear Truss/Onstage

Intelligent Lighting

Follow Spot(s) - location, scaffold, masking

5 OF 6

Control Console - where, what style, risers, masking?

Power - amps/voltage/phase, location, cost, who pays

VIDEO

Screen(s)/Projectors

Cameras

PERSONNEL

Business Agent/Labor Manager/Crew Chief

Stage Hand Call - load in

Riggers - personnel/man lift?

Show Crew - stage manager/cue caller, Audio, LD, TD, operators, stagehands

Stage Hand Call - load out

BRIDE WEDDING CHECKLIST

BRIDE _____ **GROOM** _____

ADDRESS _____

PHONES _____

FAX _____

EMAIL _____

DOB _____

First wedding for bride? _____ **first wedding for groom?** _____

Referred by _____ **Wedding Date** _____

Number of Guests _____ **Times: Ceremony** _____ **Reception** _____

Ceremony location _____

Contact: name _____ **phone** _____

Celebrant _____

Reception location _____

Contact: name _____ **phone** _____

Style of reception: a) coffee-and-cake _____ **b) cocktails and hors d'oeuvres** _____

c) buffet meal _____ **d) sit-down meal** _____ **e) other** _____

full bar _____ **beer & wine** _____ **no alcohol** _____

If e) please explain _____

Move in date & time

2 OF 9

_____ Start time _____ End
time _____ Strike day and time _____

Wedding style: a) very formal___ b) formal___ c) semi-formal ___ d) informal___
e) non-traditional ____ f) ethnic or religious heritage ____

If e) or f), please explain: _____

What is your theme or vision for your wedding? _____

WHO'S WHO

POSITION

CONTACT INFO

How many people in the wedding party?

3 OF 9

Bridesmaids (including maid or matron of honor)_____

Groomsmen/Ushers (including best man)_____

Flower girl(s)_____ ring bearer(s)_____

Who is the Bride's escort down the aisle? _____

What color(s) do you want your bridesmaids/maid (matron) of honor to wear?

What colors do you want in flowers? What flowers do you envision?

What colors do you envision in your linens and décor?

Other Elements of Design and Décor you envision: (example: Chuppah)

Other services:

4 OF 9

Hotel rooms _____

Gift bags/baskets for out-of-town guests _____

Transportation _____

Photography & Videography _____

Ceremony Music _____

Reception Music _____

Rehearsal Dinner _____

Wedding favors/extras _____

Color & Style of Gown (attach picture and swatch when available)	FLORAL COSTS
Bouquet (style, colors, flowers)	
Floral or other Headpiece	

BRIDAL PARTY

Color & Style of Gowns (attach picture and swatches when Available)	QTY	COST PER EACH	TOTAL COST
Honor Attendant Bouquet - (style, colors, flowers)			
Bridesmaids Bouquets - (style, colors, flowers)			
Flower Girl - (age, color & style of gown)			
Floral Headpiece(s)			

BOUTONNIERES***6 OF 9**

Groom			
Best Man	Groomsmen		
Fathers	Grandfathers		
Ushers			
Ring Bearer(s)			
Other			

CORSAGES*

Bride's Mother			
Groom's Mother			
Grandmothers			
Others			

CEREMONY – FLOWERS & OTHER DECOR

Alter/Bima			
Aisle/Pew Décor			
Trees & Foliage			
Canopy			

Candelabra - (alter)			
Candelabra - (aisle)			
<input type="checkbox"/> Kneeling Bench <input type="checkbox"/> Unity Candle			
Aisle Cloth - (material/length)			
Entrance/Narthex			
Other Decor			

RECEPTION DECOR

ENTRANCE			
STAGE/DANCE FLOOR			
TABLE TREATMENT			

			8 OF 9
CAKE TABLE			
OTHER - (buffet, wall décor, lighting, etc.)			

REHEARSAL DINNER

Centerpieces			
Other			

***Bride's Flowers, Boutonnieres, Corsages and Rehearsal Dinner are traditionally paid for by Groom in some cultures and societies, but this practice varies.**

RISK MANAGEMENT CHECKLIST FOR EVENTS

EVENT _____

DATE(S) & TIMES _____

VENUE _____

ROOM/SPACE _____

ADDRESS _____

VENUE CONTACT _____

PRIMARY CLIENT CONTACT _____

CELL _____
EMAIL _____
OTHER CRITICAL CONTACT(S) _____

PHONES _____

FAX _____
EMAIL _____

STAKEHOLDERS	PHONE	CELL	EMAIL
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Crisis Chain of Command: _____

Media Contact: _____

EMERGENCY CONTACTS

First Responders: (who) _____
Fire Department: (How far away?) _____
Security: _____ Police _____
Hospital: _____ Other _____

1) Risk Analysis

When Completed? _____

When Communicated? _____

To Whom? _____

a) **SWOT Analysis** (Strengths, Weaknesses, Opportunities & Threats) -- typical component of any special event management project; concentrate on risk management elements.

Strengths	Weaknesses	Opportunities	THREATS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

b) **GAP Analysis** -- typical component of any special event management project; concentrate on risk management elements.

Elements not yet addressed that could pose problems (ex., rain on a festival - solution: a tent)

d) **Threat Assessment:** What are chances of? What is **back-up/contingency?**

i) **Natural Disaster:**

- high wind
- earthquake
- tsunami
- forest fire
- snow, ice, hail
- Flood

Contingency _____

ii) Human Initiated

- emergency medical
- fires
- chemical spill
- bomb threat
- terrorism
- extreme violence
- economic espionage
- labor issues
- Theft

Action required _____

iii) Event Specific show-stoppers

- Technical (burned out projector lamp)
- broken microphone
- power outage
- loss of internet
- lack of proper **permits**
- talent no-shows

Avoidance/Corrective Action _____

iv) Threats Against Persons -- requires professional advice & training*

Level One: routine hazards

Level Two: public irregularity, interaction with security or police

Level Three: veiled threat; direct threat with no previous history;
no mental health records

Level Four: direct threat with means to carry it out; past history of violence; displays weapon

Level Five: direct threat with previous attempts or efforts, solid investigation shows weapons and propensity to use weapons or acts of violence, or explosives

* seminars and training are available

Response to Level One _____
Level Two _____
Level Three _____
Level Four _____
Level Five _____

c) **Event Risk Profile** -- determine the likelihood of negative action or occurrence

Risk Factors:

High profile, large attendance, celebrity participation, inherently risk prone venue, theft susceptible items, potential protestors, easy access venue, history of controversy, potential labor disputes, commercial or industrial espionage threat, attendee demographic with history of trouble.

- i) **Low risk:** none of risk factors above
- ii) **High risk:** more than one of risk factors above
- iii) **Medium risk:** judgment call

Risk Analysis: _____

2) Emergency Management Plan (EMP)

Design an EMP appropriate to the level of risk of your event.

a) **Anticipate** and **prevent** negative occurrences

- i) **Low risk:** design a standard emergency management plan, train staff
- ii) **High risk:** hire special event security firm to design and implement a security plan.
- iii) **Medium risk:** consult with a special event security firm help write security plan and make recommendations

Action _____

b) **Mitigate** negative effects of occurrence

- i) **Low risk:**
 - Establish a standard emergency management plan (EMP) _____
 - Have sure staff is familiar with and rehearsed in EMP _____
 - Staff knows venue EMP _____
 - Staff knows first responders and contact numbers/methods _____
 - Staff trained in CPR & Heimlich maneuver _____

ii) **High Risk:** hire a professional special event firm and/or consult with appropriate law enforcement authority.

Date action Taken: _____

iii) **Medium Risk:** consult with a professional special event firm and/or consult with appropriate law enforcement authority.

Date action Taken: _____

c) **Communicate** effectively to minimize negative public relations effects 5 of 5

i) **Internal Communications** -- have a plan for orderly communication to stakeholders, including contact information; or establish contact plan with an emergency notification firm.

Action Taken _____

ii) **External Communications** -- Your event manager may *not* know that poor communication can make the situation worse. Make sure there is communications chain, with attention to media relations.

Establish communications plan authoritatively, train and rehearse staff.

Action Taken _____

d) **Transfer Risk**

i) Insure against loss -- do an insurance audit of existing coverage

Date last insurance audit completed: _____

ii) Confirm all suppliers, contractors and venue are adequately insured

Certificates of insurance received from:

iii) Consider event insurance yes_____ no_____

e) **Implement EMP**

i) Communicate EMP to stakeholders, venue and onsite personnel

Date Completed: _____

ii) Train staff

Date Completed: _____

DISCLAIMER: This document is not finished nor definitive, but is intended as a guide for the event professional to construct his or her own checklist.

Special thanks to Kevin Mellot of ERASE ENTERPRISES LLC, for consultation and Contributions to the Risk Management Checklist. Shortcomings and errors are my fault.