

FUNCTION PLANNING CHECKLIST – GUIDE ONLY

FUNCTION NAME	
BACKGROUND <i>(Who initiated function)</i>	
FUNCTION TYPE <i>(Gala dinner, luncheon cocktail reception, community meeting, round table forum, awards presentation)</i>	
DATE OF FUNCTION	
TIME OF FUNCTION	
LOCATION OF FUNCTION/EVENT <i>(recommend site visit prior to booking)</i>	
CULTURAL OBSERVANCES	
HOST	
GUEST LIST – ORDER OF PRECEDENCE <i>(Governor, Premier, Ministers, Members of Parliament, VIP involvement)</i>	
GUEST LIST - TARGET AUDIENCE	
EXPECTED NUMBER OF ATTENDEES	
PROJECT MANAGER/COORDINATOR/ CONTACT PERSON	
PROJECT TEAM MEMBERS	
MEDIA LIAISON/COMMUNICATIONS CONTACT	

<p>PROJECT PURPOSE/BRIEF - OBJECTIVES/OUTCOMES <i>(What is hoped to be achieved with this function)</i></p>	
<p>BUDGET <i>(Separate document should be established)</i></p>	
<p>RISK ASSESSMENT <i>(Identify possible risks and develop strategies to minimise risks)</i></p>	
<p>WHAT FOLLOW THROUGH WILL BE REQUIRED AFTER THE EVENT AND WHO WILL BE RESPONSIBLE</p>	
<p>EVALUATION CRITERIA AND METHODOLOGY ESTABLISHED <i>Event Debrief</i> <i>Evaluation Report</i></p> <p><i>(Achievements against Project Purpose/Brief – Objectives & Outcomes)</i></p>	

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SCOPING, PLANNING AND IMPLEMENTATION

CORE ELEMENT	Person Responsible	Action/Comments	Date to be completed
PROJECT TEAM <ul style="list-style-type: none"> • Project Plan/Gant Chart developed 			
ASSESS CONTINGENCIES <ul style="list-style-type: none"> • Weather • Accessible for guests to and from event ie transport; parking • Number of attendee predictions • Unexpected non-attendance of host/key presenters 			
BUDGET <ul style="list-style-type: none"> • Funds available • Breakdown - estimated expenditure • Sponsorship (if appropriate) • Quotes sourced 			
BRANDING <ul style="list-style-type: none"> • Branding/Signage 			
MEDIA/COMMUNICATIONS/MARKETING <ul style="list-style-type: none"> • Determine appropriate media • Determine appropriate marketing 			
FILMING/VIDEOING/PHOTOGRAPHY <ul style="list-style-type: none"> • Filming • Photography • Video 			
ENTERTAINMENT <ul style="list-style-type: none"> • Live band • Instrumental • Choir 			
DECORATIONS <ul style="list-style-type: none"> • Floral arrangements • Artwork • Balloons 			

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<p>CEREMONIAL/AWARDS</p> <ul style="list-style-type: none"> • Flags • Wreath • Medals • Awards/Gifts • Certificates 			
<p>VALUE ADDED FOR GUESTS</p> <ul style="list-style-type: none"> • Gifts • Programs • Showbags • Pens 			
<p>GUEST LIST</p> <ul style="list-style-type: none"> • Order of Precedence (Governor, Premier) • VIPs • Stakeholders • Function/Event based • Media • Interpreters • And guests (partners) • Gender equity 			
<p>INVITATION</p> <ul style="list-style-type: none"> • Design (hard copy or electronic) <ul style="list-style-type: none"> - Wording (Host/invitee, date, time, venue) - Dress code - Cost - Dietary requirements - Disability access - Reply due date or RSVP - Guest reply contact details - Entrée card details (if required) • Determine form of reply/registration • Final proof checked and approved • Merge to guest list • Check merged data • Invitation printed/emailed • SEND • Coordinate replies for final guest list, names tags etc 			

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<p>VENUE</p> <ul style="list-style-type: none"> • Determine venue set-up (seek floor plan and site plan) • Receive quote (based on requirements) • Confirm venue (undertake site visit prior) • Complete venue contract • Raise purchase order • Pay deposit / receive invoice • Select food and beverages (if being sourced at venue). <i>See Catering</i> • Entrance - receiving of guests/attendees area • Cloak room • Develop venue running sheet • Disabled access; visual & hearing impaired access • Toilets & disabled toilets • Directional signage • Parking including for Governor, Premier, VIPs • Security • Emergency exit points • Advise final guest numbers • Receive and pay final invoice 			
<p>HOSPITALITY</p> <ul style="list-style-type: none"> • Welcome signage at entrance • Ushers briefed (guest list, venue etc) 			

CORE ELEMENT	Person Responsible	Action/Comments	Date to be completed
<p>AUDIO VISUAL REQUIREMENTS</p> <ul style="list-style-type: none"> • Establish AV provider (In-house or external) • Determine requirements <ul style="list-style-type: none"> - Lighting - Lecturn with microphone - Hand held roving microphone - Lapel microphone - Desk microphones for panel set-up - Laptop - Data projector - DVD Player - Screen - Plasma screens - Stage • Media Equipment (ie splitter, media mics) • Hanging/freestanding banner requirements • Music (background/live) • Receive AV quote • Complete AV contract • Raise purchase order • Meet with AV supplier onsite • Provide any video footage, music, presentations etc • Receive & pay final invoice 			
<p>SECURITY</p> <ul style="list-style-type: none"> • In-house security alerted/arranged • External contractors • SAPOL/AFP (if required) • Scanning arrangements (if required) • Occupational health, welfare and safety concerns addressed • Provision of First Aid 			

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<p>CATERING (FOOD & BEVERAGE)</p> <ul style="list-style-type: none"> • Menu (SA food & wine) based on function/event • Catering to be sourced through venue or external supplier • Tasting with wine matching (if dinner) • Cost per head or on-consumption • Beverages – SA wines & beers, water, orange juice, tea and coffee etc • Food (hot & cold) – sandwiches, morning/afternoon tea selection, fruit platters, cocktail finger food, gala dinner etc • Self service or waiting staff • Buffet • Equipment required <ul style="list-style-type: none"> - Tables, tablecloths, cups and saucers - Plates, napkins, knives and forks (disposable/non-disposable) • Power supply • Special dietary requirements • Cultural/religious dietary requirements • Catering/guest numbers • Final menu & quotes • Raise purchase orders • Final catering numbers • Receive & pay final invoices 			
<p>BRIEFINGS (WRITTEN & VERBAL)</p> <ul style="list-style-type: none"> • Function/Event briefings for Governor, Premier etc (include maps, special instructions) • Conduct key personnel briefing • Conduct staff/volunteer briefing • Conduct third-party briefing 			

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<p>MASTER OF CEREMONIES/SPEAKERS PRESENTERS/GUEST-OF-HONOUR</p> <ul style="list-style-type: none"> • Obtain quotes • Book and brief • Raise purchase orders • Receive biographies, photos, power point presentations and abstracts (as relevant) • Provide MC/speakers with final onsite briefing papers (including house keeping) • Rehearsal • MC/speaker gifts • Coordinate 'meet and greet' arrangements • Secure permissions to upload presentations on internet • Receive & pay final invoices 			
<p>PROGRAM/RUNNING SHEET/SPEECHES</p> <ul style="list-style-type: none"> • Program finalised & function detail sheets • Running sheet finalised • Program/running sheet distributed to those required • Host, MC & speakers fully briefed • Speech notes (if required) • Brief caterers/waiting staff & AV 			
<p>STAFFING</p> <ul style="list-style-type: none"> • Assistance on day • Extra required (& on stand-by) • Dresscode/uniform/name badge • Communication ie mobile phones • Meet and greet arrangements with host, MC & guests 			

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<p>ON THE ACTUAL DAY OF FUNCTION</p> <ul style="list-style-type: none"> • TAKE TO FUNCTION/EVENT <ul style="list-style-type: none"> - Running sheet/procedure - Function details - Final guest list - MC speech notes etc - Speeches/toast cards - Welcome to Country (back-up reading) - Floor Plan/Room Lay-out - Seating Plans - Contacts list with telephone numbers - Stationery - Name Tags/place cards - Gifts/momento's - Plaques - Label maker - Phone chargers etc • Arrival/set-up (time required) • Dais/stage with water table • Room layout (tables & chairs) • Flags/banners – Branding • Entrance layout • Registration desk • Name tags/place cards • Meet AV provider • Photographer • Meet caterers • Meet & greets; seating arrangements • Pack down time 			

CORE ELEMENT	Person Responsible	Action/Comments	Date to be completed
<p>AFTER THE FUNCTION</p> <ul style="list-style-type: none"> • Return hired equipment • Project Team debrief • Host & guest feedback • Guidelines for improvement next time • Evaluation against criteria • Thank You letters/e-mails to relevant parties • Forward any Thank You letters / e-mails received onto host / organiser / appropriate staff member • Distribute any documents & photographs • Finalise budget expenditure 			