

Planning Helper **SAMPLE**

Food & Beverage (Catering) Checklist

Name of Function or Event

Day / Date / Year – Name and Location of Venue

Preparation Before Request for Proposal

- | | |
|--|---|
| <input type="checkbox"/> F&B history from prior events gathered | <input type="checkbox"/> Inquire about additional services: |
| <input type="checkbox"/> F&B specifications drafted | <input type="checkbox"/> Florist (centerpieces) |
| <input type="checkbox"/> Group value estimated / documented | <input type="checkbox"/> Decorations (props, stanchions) |
| <input type="checkbox"/> Fact sheet ready | <input type="checkbox"/> Photographer |
| <input type="checkbox"/> F&B expense matrix formatted (cost comparison) | <input type="checkbox"/> Parking |
| <input type="checkbox"/> Budget forecast in progress | <input type="checkbox"/> Audiovisual |
| <input type="checkbox"/> Initial inquiries to prospective caterers made | <input type="checkbox"/> Security |
| <input type="checkbox"/> All menus and catering policies received | <input type="checkbox"/> Research ease of access from thoroughfares |
| <input type="checkbox"/> Expense matrix complete, submitted for approval | <input type="checkbox"/> Request for Proposal distributed to caterers (2) |
| <input type="checkbox"/> Budget forecast approved | <input type="checkbox"/> Alert marketing team |
| <input type="checkbox"/> Updated function specs ready | <input type="checkbox"/> Prep communications schedule, registration |

Proposal Review

- | | |
|--|---|
| <input type="checkbox"/> Verify proposals received by deadline | <input type="checkbox"/> Accessibility for disabled |
| <input type="checkbox"/> Menu prices (verify price cap if necessary*) | <input type="checkbox"/> Fees (set-up, carvers, attendants, overtime) |
| <input type="checkbox"/> Catering policies | <input type="checkbox"/> F&B equipment rental (special requests) |
| <input type="checkbox"/> Room or space rental | <input type="checkbox"/> Service charge, taxes, gratuities |
| <input type="checkbox"/> Attrition policy – F&B minimum | <input type="checkbox"/> Insurance requirements |
| <input type="checkbox"/> Cancellation policy | <input type="checkbox"/> Permits (special event, musicians) |
| <input type="checkbox"/> Payment policy | <input type="checkbox"/> Parking availability and fees |
| <input type="checkbox"/> Local laws and regulations (liquor, union, fire code) | <input type="checkbox"/> F&B guarantee due date |
| <input type="checkbox"/> Union considerations (staffing minimum, etc.) | <input type="checkbox"/> Contract approval deadline |
| <input type="checkbox"/> Staffing ratio (servers, bartenders) | <input type="checkbox"/> |

Before Signing Contract

- | | |
|---|---|
| <input type="checkbox"/> Schedule site inspection visit | <input type="checkbox"/> Request contract from selected service provider |
| <input type="checkbox"/> Update F&B expense matrix | <input type="checkbox"/> Proofread, proofread, proofread contract |
| <input type="checkbox"/> Negotiate final details | <input type="checkbox"/> Require revisions to contract be written not verbal |
| <input type="checkbox"/> Note attrition policies for close monitoring | <input type="checkbox"/> Gain approval to sign from legal counsel or superior |
| <input type="checkbox"/> Submit recommendations for approval | <input type="checkbox"/> |

Registration

- | | |
|---|---|
| <input type="checkbox"/> Individual registration, payment method | <input type="checkbox"/> Directions, map |
| <input type="checkbox"/> Sponsor / VIP registration, payment method | <input type="checkbox"/> Parking availability and cost for self and valet |
| <input type="checkbox"/> Exhibitor registration, payment method | <input type="checkbox"/> Set-up master account |
| <input type="checkbox"/> Registration methods (form, online) | <input type="checkbox"/> Order supplies |
| <input type="checkbox"/> | <input type="checkbox"/> |

Verify Within 30 Days of Arrival

- | | |
|---|---|
| <input type="checkbox"/> Review time line deadlines (deposits, guarantee) | <input type="checkbox"/> Proofread, proofread, proofread BEO's (contract!) |
| <input type="checkbox"/> Confirm catering contact and banquet captain | <input type="checkbox"/> Require BEO changes be confirmed in writing |
| <input type="checkbox"/> Order decorations and centerpieces | <input type="checkbox"/> Reconfirm verbally with all vendors, entertainment |
| <input type="checkbox"/> Order printing and signage | <input type="checkbox"/> Finalize time line, script, agenda |
| <input type="checkbox"/> Order speaker / VIP gifts or awards | <input type="checkbox"/> Confirm speaker and VIP arrangements |
| <input type="checkbox"/> Finalize function specs with set-up details | <input type="checkbox"/> Monitor and adjust guarantee – watch attrition |
| <input type="checkbox"/> Forward function specs to caterer for BEO prep | <input type="checkbox"/> Schedule pre-con meeting with venue staff |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Wrap-Up After Event

- | | |
|---|--|
| <input type="checkbox"/> Thank you letters to venue and vendors | <input type="checkbox"/> Critique what went well or didn't |
| <input type="checkbox"/> Include names of exceptional employees | <input type="checkbox"/> Record number of advance registrations |
| <input type="checkbox"/> Confirm final food and beverage count for each day | <input type="checkbox"/> Record number of cancellations and walk-ins |
| <input type="checkbox"/> Review invoice promptly | <input type="checkbox"/> Record dates guarantees given and numbers |
| <input type="checkbox"/> Pay undisputed charges immediately | <input type="checkbox"/> Record beverage consumption by type |
| <input type="checkbox"/> Resolve disputed charges within 30 days | <input type="checkbox"/> Record actual F&B revenue generated |

[Click here for instructions on creating your own F&B checklist.](#)

[Questions? Ask Sharron at \[www.PlanningHelper.com\]\(http://www.PlanningHelper.com\)](#)