

# Planning Helper **EXAMPLE**

## Food & Beverage Time Line (catered meal function in September of same year)

Illustrating 3 Sort Capabilities for Different Monitoring Purposes

**SAMPLE CATEGORIES: Budget - Contract - F&B - Logistics - Vendors**

Start Date See link next page	Categories	Deadline	Tasks	Notes	Assigned	Current Status
<b># 1 SORTED BY &gt; Start Date &gt; Category</b>						
01/01/00	Budget	01/15/00	Copy and paste F&B portion of overall budget OR create income and expense statements for budget forecast	Set-up budget forecast detailed for F&B	SC/CF	Done
01/01/00	Logistics	01/15/00	Prep caterer comparison spreadsheet	Mid-range to upscale	BE	Done
01/01/00	Logistics	01/15/00	Calculate and document group history of F&B functions	Update from previous year history or forecast based on similar functions	SC	Done
01/01/00	Logistics	01/15/00	Prep initial function specs for all F&B related arrangements	Caterers, decorator, equipment rentals, audio visual, utilities	SC	Done
02/01/00	F&B	02/15/00	Request menus and catering policies from onsite and independent caterers.	Check references.	SC	Partial
02/15/00	Budget	03/01/00	Get budget approval if anticipated overage. Make adjustments as directed.	BEO's to be initiated 30 days in advance.	SC/CF	Ongoing
03/01/00	Logistics	03/15/00	Complete comparison worksheet. Analyze. Select short list of caterers to contact first	Required to work with in-house caterer if hotel venue selected.	BE	Partial
03/15/00	F&B	04/01/00	Meet with top two caterers on short list. Verify menu item quotes are firm. If not now, when?	Discuss menu options to control cost, keep quality. In-season food items.	SC	
04/01/00	Vendor	04/15/00	Get bids for equipment rentals, decorations, other ...	Centerpieces only. No other decorations. Linens included. Rent carpet, stanchions.	WC	
04/15/00	Contract	05/01/00	Intiate, negotiate, finalize all catering related contracts, permits and insurance.	Caterers, decorator, equipment rentals, audio visual, utilities, security, fire	SC/WC	
06/15/00	Logistics	07/01/00	Detail final function specifications and re-distribute	Absolutely no later than 30-days in advance of event	SC	
07/01/00	F&B	07/15/00	Finalize BEO's with caterer	Compare line-by-line with specs	SC	
07/15/00	Logistics	08/01/00	Update time line for all last minute tasks	Verify permits and insurance in place	SC	
08/01/00	Logistics	08/15/00	Touch base and re-confirm arrangements	Caterer, decorator, equipment rental	SC	

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Start Date <small>See link next page</small>	Categories	Deadline	Tasks	Notes	Assigned	Current Status
08/15/00	Catering	09/01/00	F&B guarantees due one week in advance. Can increase after guarantee, but can't lower.	Consider no-show factor before guarantee.	SC	
			Etc.			

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<b># 2 SORTED BY &gt; Category &gt; Assigned</b>						
01/01/00	Budget	01/15/00	Copy and paste F&B portion of overall budget OR create income and expense statements for budget forecast	Set-up budget forecast detailed for F&B	SC/CF	Done
02/15/00	Budget	03/01/00	Get budget approval if anticipated overage. Make adjustments as directed.	BEO's to be initiated 30 days in advance.	SC/CF	Ongoing
08/15/00	Catering	09/01/00	F&B guarantees due one week in advance. Can increase after guarantee, but can't lower.	Consider no-show factor before guarantee.	SC	
04/15/00	Contract	05/01/00	Intiate, negotiate, finalize all catering related contracts, permits and insurance.	Caterers, decorator, equipment rentals, audio visual, utilities, security, fire	SC/WC	
02/01/00	F&B	02/15/00	Request menus and catering policies from onsite and independent caterers.	Check references.	SC	Partial
03/15/00	F&B	04/01/00	Meet with top two caterers on short list. Verify menu item quotes are firm. If not now, when?	Discuss menu options to control cost, keep quality. In-season food items.	SC	
07/01/00	F&B	07/15/00	Finalize BEO's with caterer	Compare line-by-line with specs	SC	
01/01/00	Logistics	01/15/00	Prep caterer comparison spreadsheet	Mid-range to upscale	BE	Done
03/01/00	Logistics	03/15/00	Complete comparison worksheet. Analyze. Select short list of caterers to contact first	Required to work with in-house caterer if hotel venue selected.	BE	Partial
01/01/00	Logistics	01/15/00	Calculate and document group history of F&B functions	Update from previous year history or forecast based on similar functions	SC	Done
01/01/00	Logistics	01/15/00	Prep initial function specs for all F&B related arrangements	Caterers, decorator, equipment rentals, audio visual, utilities	SC	Done
06/15/00	Logistics	07/01/00	Detail final function specifications and re-distribute	Absolutely no later than 30-days in advance of event	SC	
07/15/00	Logistics	08/01/00	Update time line for all last minute tasks	Verify permits and insurance in place	SC	
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<b># 3 SORTED BY &gt; Assigned &gt; Deadline</b>						
01/01/00	Logistics	01/15/00	Prep caterer comparison spreadsheet	Mid-range to upscale	BE	Done
03/01/00	Logistics	03/15/00	Complete comparison worksheet. Analyze. Select short list of caterers to contact first	Required to work with in-house caterer if hotel venue selected.	BE	Partial
01/01/00	Logistics	01/15/00	Calculate and document group history of F&B functions	Update from previous year history or forecast based on similar functions	SC	Done
01/01/00	Logistics	01/15/00	Prep initial function specs for all F&B related arrangements	Caterers, decorator, equipment rentals, audio visual, utilities	SC	Done
02/01/00	F&B	02/15/00	Request menus and catering policies from onsite and independent caterers.	Check references.	SC	Partial
03/15/00	F&B	04/01/00	Meet with top two caterers on short list. Verify menu item quotes are firm. If not now, when?	Discuss menu options to control cost, keep quality. In-season food items.	SC	
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