

IN-PERSON EVENT

BUDGET CHECKLIST

Below are items to consider as you put together your plan and budget for your event.

EVENT TITLE:

Date(s):

Location:

Estimated No. of attendees:

| CATEGORY | TIPS | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED | COMMENTS |
|--|---|-----------|--------|----------------------------|----------|
| Item | | \$0.00 | \$0.00 | \$0.00 | |
| GENERAL SESSION SPACE | | | | | |
| Breakout/ concurrent spaces | Include rental cost of general session and breakout rooms. Note deposit schedule if applicable. | | | | |
| Shipping/receiving fees | Most venues charge a fee for delivering/picking up boxes shipped to/from the venue. Check the available services and note that you'll need to use your own FedEx/UPS account numbers. | | | | |
| Storage fees | Some venues charge a fee if they need to store any materials until the planner arrives on-site. | | | | |
| Tables and chairs | Depending on the venue, you may need to rent additional tables and chairs. | | | | |
| Linens | Depending on the venue, you may need to rent linens. | | | | |
| Gratuities | Usually run anywhere from 20%–26%, depending on location. Check contract for percentage amount. | | | | |
| Tax | If your organization is tax-exempt, make sure to provide a certificate to the venue. | | | | |
| Insurance | Check with the venue to see if special event insurance is required. | | | | |
| Subtotal | | | | | |

| CATEGORY | TIPS | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED | COMMENTS |
|--|---|-----------|--------|----------------------------|----------|
| CATERING | | | | | |
| Breakfast | Include the number of instances × price per person | | | | |
| Lunch | Include the number of instances × price per person | | | | |
| Dinner | Include the number of instances × price per person | | | | |
| Snacks | Include the number of instances × price per person | | | | |
| Continuous coffee/tea/water service | Usually provided by the gallon – 16 cups per gallon. Rule of thumb: estimate 2.5 cups per person. | | | | |
| Gratuities | Usually run anywhere from 20%–26%, depending on location. Check contract for percentage amount. | | | | |
| Tax | If your organization is tax-exempt, make sure to provide a certificate to the venue. | | | | |
| Subtotal | | | | | |

| | | | | | |
|--------------------------|--|--|--|--|--|
| EQUIPMENT | | | | | |
| AV rental | Check to see if any discounts were negotiated in the contract. | | | | |
| Wi-Fi | Check the contract to see if Wi-Fi was included in the event space or if any discounts were negotiated. Will need to determine how many users you will have to make sure the bandwidth is fast enough. | | | | |
| Charging stations | Consider setting up 4–5 highboys in the back of the general session room with 6–8 prong power strips so attendees can charge devices during breaks. | | | | |
| Tech support | Review with the team and see if AV/equipment support is needed during the course of the event. | | | | |
| Labor | Include setup and tear down of any AV equipment, staging, etc. | | | | |

| CATEGORY | TIPS | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED | COMMENTS |
|--------------------------|---|-----------|--------|----------------------------|----------|
| EQUIPMENT | | | | | |
| Staging | Discuss what is needed/wanted with the team and add to the AV proposal. Rentals may be needed for the stage furniture from the venue or another vendor. | | | | |
| Staging decor | | | | | |
| Staging furniture | | | | | |
| Lighting | | | | | |
| Gratuities | Usually run anywhere from 20%–26%, depending on location. Check contract for percentage amount. | | | | |
| Tax | If your organization is tax-exempt, make sure to provide a certificate to the venue. | | | | |
| Subtotal | | | | | |

| EVENT COMMUNICATIONS | | | | | |
|--|--|--|--|--|--|
| Announcements | Track costs of creating, editing, and deploying event communications – whether handled internally or through vendors. (Tracking internal time will let you see if it might be cost-effective to outsource this for future events.) | | | | |
| Press releases | | | | | |
| Attendee communications | | | | | |
| Speaker communications | | | | | |
| VIP communications | | | | | |
| Emcee talking points | | | | | |
| Housekeeping notes | | | | | |
| Survey and cover message | | | | | |
| Thank-you notes and post-event evaluation | | | | | |
| Subtotal | | | | | |

| CATEGORY | TIPS | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED | COMMENTS |
|-----------------------------------|--|-----------------|--------|----------------------------|----------|
| EVENT PROGRAMMING | | | | | |
| Registration configuration | Track cost of software used for website/registration (Google form, Cvent, registration software system, email response, etc.). | | | | |
| Mobile app | Cost for setting up and using mobile apps for events. | | | | |
| Credit card/merchant fees | Credit card/merchant fees associated with processing registration fees. | | | | |
| Entertainment | Track costs for any non-content related entertainment such as music or fun activity. | | | | |
| Video production | Review venue/vendor contracts and circle back with the team to make any necessary changes from the original estimate. | | | | |
| Videographer | | | | | |
| Photographer | | | | | |
| Presentation graphics | | | | | |
| Interpreters | | | | | |
| | | Subtotal | | | |

| CATEGORY | TIPS | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED | COMMENTS |
|---|---|-----------|--------|----------------------------|----------|
| PRINTING/SUPPLIES | | | | | |
| Translation of meeting materials | Track costs for translating meeting materials – this info will be helpful in creating future estimates. | | | | |
| Agenda | Designing and printing (recommend 2–3 estimates for consideration if designing and printing with vendors). | | | | |
| Session handouts | | | | | |
| Flyers | | | | | |
| Maps | | | | | |
| Signage | | | | | |
| Folders | | | | | |
| Name badge production and supplies | Cost of designing as well as printing before and during event registration. Factor in costs of supplies including holders, lanyards, etc. | | | | |
| Session supplies | Obtain order confirmations for items ordered for event. | | | | |
| Giveaways | Cost of any giveaways (tote bags, notebooks, pens, etc.). | | | | |
| Shipping | Track shipping costs, both for your office and from vendors. | | | | |
| Subtotal | | | | | |

| SPEAKERS | | | | | |
|---|--|--|--|--|--|
| Speaker/presenter travel | Cost of arranging or reimbursing speaker/presenter travel. | | | | |
| Ground transportation | Speaker/presenter transport from/to the event venue (car service, mileage, tolls, etc.). | | | | |
| Per diem | Speaker/presenter meals while traveling to/from event. | | | | |
| Speaker/presenter honorarium or fees | Collect W-9 forms for the accounting office to process honorarium or pay fees. | | | | |
| Subtotal | | | | | |

| CATEGORY | TIPS | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED | COMMENTS |
|-------------------------|---|-----------|--------|----------------------------|----------|
| STAFFING | | | | | |
| Staff | Budgeted time for core staff to prep and manage event. | | | | |
| Additional staff | Cost for additional staff needed to assist with the event. | | | | |
| Travel expenses | Costs for staff travel to/from event (air/train, ground transportation, per diem amount). | | | | |
| Subtotal | | | | | |

| TOTAL BUDGET | | | |
|---------------------------------------|-----------|--------|----------------------------|
| CATEGORY | PROJECTED | ACTUAL | ACTUAL LESS/OVER PROJECTED |
| GENERAL SESSION SPACE SUBTOTAL | | | |
| CATERING SUBTOTAL | | | |
| EQUIPMENT SUBTOTAL | | | |
| EVENT COMMUNICATIONS SUBTOTAL | | | |
| EVENT PROGRAMMING SUBTOTAL | | | |
| PRINTING/SUPPLIES SUBTOTAL | | | |
| SPEAKERS' SUBTOTAL | | | |
| STAFFING SUBTOTAL | | | |
| Subtotal | | | |

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