

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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