

This event-planning checklist is an additional tool to assist you with planning successful events at WSU. As you are planning your event, please think about the facility, food and beverages, speakers, performers, transportation, and lodging.

Name of Event: \_\_\_\_\_

Date of Event: \_\_\_\_\_ Program/Gift Account #: \_\_\_\_\_

Event Space/Location(s): \_\_\_\_\_

Complete a **Purchase Request** form for expenses related to event space/location rentals (Pcard, Purchase Order, or WSU IRI/ISD). Complete one form for each supplier/vendor. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Reserve space/location for the event. Any written contracts/agreements with non-WSU vendors **MUST** be signed by the Student Engagement Executive Director. Written agreements with WSU departments can be signed by a Student Engagement Advisor. Once approved, send a copy of the agreement and/or event reservation confirmation to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Food & Beverage Vendor(s): \_\_\_\_\_

Complete a **Purchase Request** form for any food and/or beverage purchases (Pcard, Purchase Order, or WSU IRI/ISD, CougarCard). Complete one form for each supplier/vendor. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Per Diem Limits: The cost per meal served may not exceed the applicable travel meal limits for the location (including tax and gratuity/tip). Pullman/Moscow meal per diem rates are currently: breakfast - \$14.00, lunch - \$16.00, dinner - \$25.00.

Funding: If the account used is NOT a S&A fund, a "Request to Serve Food" form is required (*form is required for all CCE & CFSL accounts*).

Attendees: Please indicate on the Purchase Request form if the event is "Open to Public" (*when the number of participants is large or when the names of participants are unknown*) or if you can provide an "List of Attendees" (*a list of participants, indicating each participant's relationship to the University, e.g., employee, official, guest*).

Alcohol is prohibited!

Marketing & Printing: \_\_\_\_\_

Complete a **Purchase Request** form for expenses related to event space/location rentals (Pcard, Purchase Order, or WSU IRI/ISD, CougarCard). Complete one form for each supplier/vendor. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

If working directly with Student Affairs Marketing Office or WSU Design & Printing Services, complete a Purchase Request form. Complete one form for each supplier/vendor. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Miscellaneous Purchases: \_\_\_\_\_

Performer(s), Speaker(s), etc.: \_\_\_\_\_

Complete a **Contract, Performance or Speaker Request** form. Complete one form for each supplier/vendor. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Travel Expenses (transportation, hotel/lodging), complete the applicable sections of the form.

Hospitality Rider: see "Food & Beverage Vendors" and "Miscellaneous Purchases" above.

Travel Expenses: \_\_\_\_\_

Complete a **Travel Request** form. Complete one form for each traveler. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Complete a **Hotel/Lodging Request** form. Forms must be approved by a Student Engagement Advisor. Once complete, send form(s) to [si.finance@wsu.edu](mailto:si.finance@wsu.edu).

Consult with the **Motor Pool Guidelines**.

Airfare: see Travel Request form.