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| F:\UCLA Brand\Print UCLA Logos\print-boxed-logotype-jpg\ucla-box-blu-rgb-1h.jpg | **CATERING WORKSHEET**  Tab through worksheet and enter information at **…** or select from drop-down menus where it says **Select.**.. |

|  |  |  |  |
| --- | --- | --- | --- |
| EVENT INFORMATION | | | |
| Name of event: | … | | |
| Location: | … | | |
| Event day(s)/date(s): | **…** | Event time (start/end): | **…** |
| Setup day(s)/date(s): | … | Setup time (start/end): | … |
| Strike day(s)/date(s): | … | Strike time(start/end): | … |
| Dining format: | Select… | Guest count: | … |

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| --- | --- | --- | --- |
| VENDOR INFORMATION | | | |
| Caterer vendor name: | **…** | Caterer contact person: | **…** |
| Caterer work phone: | **…** | Caterer cell phone: | **…** |
| Bartender vendor name: | **…** | Bartender contact person: | **…** |
| Bartender work phone: | **…** | Bartender cell phone: | **…** |
| Guarantee count: | **…** | Insurance requirements: | **…** |
| Guarantee date: | **…** | Certificate of insurance provided : | **Select…** |

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| BILLING INFORMATION - CATERER | | | | | | |
| Total estimate amount: | | | **…** | Amount per person: | | **…** |
| Service rate/amount: | | | **…** | Tax rate/amount: | | **…** |
| Staffing fees: | | | … | Coordination fee: | | … |
| Purchase order number: | | | **…** | Billing terms: | | **…** |
| Deposit due date: | | | **…** | Deposit amount: | | **…** |
| Final total amount: | | | … | Final payment amount: | | … |
| Select… |  | Review entertainment policy compliance/limits | | **Select…** |  | Establish purchase order |
| Select… |  | Sign contract/campus BEO | | **Select…** |  | Deposit paid |
| Select… |  | Set up vendor in BruinBuy/provide recharge info | | **Select…** |  | Balance paid |
| Select… |  | Fill out [Accounts Payable Entertainment/Program/Exception Worksheet](http://ap.finance.ucla.edu/entertainment-exception-worksheet.htm) and submit | | | | |

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| --- | --- | --- | --- | --- | --- | --- |
| BILLING INFORMATION - BARTENDER | | | | | | |
| Total estimate amount: | | | **…** | Amount per person: | | **…** |
| Service rate/amount: | | | **…** | Tax rate/amount: | | **…** |
| Staffing charges: | | | … | Coordination fee: | | … |
| Purchase order number: | | | **…** | Billing terms: | | **…** |
| Deposit due date: | | | **…** | Deposit amount: | | **…** |
| Final total amount: | | | … | Final payment amount: | | … |
| Select… |  | Review entertainment policy compliance/limits | | **Select…** |  | Establish purchase order |
| Select… |  | Sign contract/campus BEO | | **Select…** |  | Deposit paid |
| Select… |  | Set up vendor in BruinBuy/provide recharge info | | **Select…** |  | Balance paid |

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| --- | --- | --- | --- | --- | --- |
| LOGISTICAL DETAILS | | | | | |
| Select… |  | Schedule site walkthrough | **Select…** |  | Approve final menu and design |
| Select… |  | Discuss menu, including special menu needs | **Select…** |  | Discuss event timing with caterer |
| Select… |  | Discuss buffet/table setup/décor responsibilities | **Select…** |  | Discuss staffing expectations and attire |
| Select… |  | Discuss catering kitchen/bar needs | **Select…** |  | Provide head count/guarantee/seating |
| Select… |  | Set up tasting | **Select…** |  | Advise on parking/load in arrangements |

(See Catering Worksheet – Notes and Suggestions on next page)

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| F:\UCLA Brand\Print UCLA Logos\print-boxed-logotype-jpg\ucla-box-blu-rgb-1h.jpg | **CATERING WORKSHEET**  **NOTES AND SUGGESTIONS** |
| MENU/CONTRACT DETAILS | * Scrutinize the banquet event order for accuracy and thoroughness. * Per person food quotes may be listed as “plus plus (or ++)” – this is for service and sales tax. These figures are not calculated in the price per person and can add substantially to your overall cost. Service fees alone can range between 20-24%. * Check with your caterer/hotel what the service charge includes. Some include gratuity, others do not. * Be moderate when providing the catering guarantee. Judge the past history of this, or similar, events to determine the average attrition rate – often in the range of 10%. * Most caterers provide an overage (often 3-5%) of food into the guarantee – confirm with your vendor . * Be aware of the university’s limits on entertaining. Reference [University of California Policy BUS-79 Expenditures for Business Meetings, Entertainment, and Other Occasions](http://policy.ucop.edu/doc/3420364/BFB-BUS-79). * An [Accounts Payable Entertainment/Program/Exception Worksheet](http://ap.finance.ucla.edu/entertainment-exception-worksheet.htm) must be filled out and submitted with each catering invoice to ensure entertainment policy compliance has been met. * Inquire about the caterer’s “green” practices, i.e. sustainability, use of compostables, etc. |
|  |  |
| MENU PLANNING | * When planning the menu, be mindful of the time of day and guest expectations on what options and quantity of food will be provided. * Provide a variety of foods, and offer vegetarian/healthy selections. Consider allergies concerns. * Be mindful of cultural or religious preferences of guests. * When serving sodas, offer regular, diet, and caffeine-free. Always offer still water. * For coffee service, provide 70% regular and 30% decaffeinated. Depending on the size of the cup, there are 16-20 cups of coffee in a gallon. * Make sure hors d’oeuvres or finger foods can be eaten in one or two bites easily. * Provide eating utensils, when appropriate, as some guests prefer using them with finger foods. * For pre-meal cocktail hours, four-six hors d’oeuvres per person per hour is usually adequate. For receptions, plan on five-seven pieces per person per hour, plus a stationary display or two. * Discuss with your caterer options for staff and/or entertainer meals, which may include different food or be served in a different location. |
|  |  |
| ALCOHOL | * If admission fees or money is exchanged at an event, even a tip cup, the personnel pouring the alcohol must have a liquor license. * Offer both white and red wine, unless venue guidelines specify red wine is not allowed. * Generally allow 2.5 glasses of wine per person. On average, there are 5 glasses in a bottle and 12 bottles in a case. * Ask for a cork or bottle count to double check quantity at end of the event. * If students are at an event where alcohol is served, plan to check identification at bars. * Always serve food and provide water when alcohol is served. * Give wait staff authority to cut off inebriated guests and have taxi phone numbers available. * At hosted bars, the event host pays for drinks; at no-host bars, or cash bars, guests pay for drinks. |
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| STAFFING GUIDELINES | * Need one bartender for every 75 to 100 people. * Need one server for every 15 people for sit-down meal (if quick service is required, suggest one server for every 10). |
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| SETUP/SERVICE | * Clarify with the caterer the equipment/décor elements they provide vs. rental needs and discuss expectations of quality of provided/rental items. * Need one double-sided buffet line for every 75 to 100 people. * Have beverage service ready 30 minutes prior to the start of event, with food ready 15 minutes prior, to avoid quality deterioration. * Recommend no catering service during your program – if appropriate, have wait staff leave carafes of coffee or beverage on tables. * When bringing a caterer onsite, check on their kitchen and water needs to ensure the chosen facility can accommodate them. For example, you may need to modify the menu if access to power or cooking space is limited. * Check on the power requirements of all equipment the caterer is bringing/renting to ensure there is adequate power. Some appliances, such as coffee makers, can generate surges in electricity that can overwhelm circuits. * Ensure the removal of trash and recyclables is considered when discussing kitchen needs. |