Catering and Private Events

A practical system for qualifying, costing and running events without losing the details.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Build one repeatable event offer before adding more. Use this guide and six editable planning sheets to connect inquiry, internal estimate, preparation, delivery and review. All examples are hypothetical; adapt staffing, costs and service promises to your restaurant.

Inside this toolkit

1. Define the event you can deliver
2. Cost the complete event not just the food
3. Control the commitment and every change
4. Build the run sheet backward from service
5. Close the event and improve the package

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Define the event you can deliver

Start with one service format: pickup platters, staffed on-site service or delivered-and-set-up meals. These are different jobs. A package that works for pickup may fail when it also needs transport, venue access, equipment and an attendant. Write the start and finish of your responsibility before choosing a menu.

- Set an initial service area, minimum lead time and guest-count range using your actual production and transport capacity. These are operating choices, not industry benchmarks.
- List what the package includes: menu, portions, serving pieces, setup, staffing and removal. State exclusions explicitly.
- Qualify the inquiry before pricing: date, venue, service time, guest count, format, budget range and decision deadline. Ask about dietary requests without promising an allergen-free result.
- Check venue access, storage, power, water, equipment and permissions before treating the job as feasible. Record the person responsible for unresolved details.

Scope: these are business-planning tools, not a food-safety plan, permit checklist or contract. FDA’s Food Code is a model; locally adopted rules and your person in charge (PIC) govern the actual operation. Confirm off-site permissions, food controls and required records with the appropriate local authority. (Source 1)

First-week action: complete the package sheet for one familiar menu, then run a small internal rehearsal. Do not accept a larger event simply because the customer is willing to pay.

Cost the complete event not just the food

Build the internal estimate from the confirmed scope. Cost the recipe quantities for the planned portions, then add packaging, event-specific labor, rentals and transport. Include paid preparation, loading, travel, setup, service and cleanup time. Use your own loaded labor-cost estimate and have payroll assumptions reviewed when needed.

Illustrative 40-guest event	Amount
Revenue: 40 × $28	$1,120
Food and packaging	$360
Event labor	$240
Rentals and transport	$140
Estimated direct costs	$740
Contribution before other costs	$380

Here, contribution is $1,120 − $740 = $380, or 33.9% of revenue. It is not profit: overhead, other labor, payment costs, taxes and unlisted expenses may still apply. Keep customer tax, gratuity and pass-through amounts separate; ask your accountant how to treat them.

- Specify the revenue basis consistently: before applicable taxes, after discounts, with each approved fee identified.
- Add a scenario for a smaller guest count or extra labor hour. If the package only works at the best case, revise the scope or price.
- Verify rental minimums, delivery charges and supplier pack sizes before sending a quote.
- Use the workbook to compare scenarios, not to replace a documented estimate or your reviewed customer terms.

Control the commitment and every change

Use one event ID from inquiry to final review. Maintain a single current version of the menu, guest count, timing and price. A message in a server’s phone is not a reliable production instruction.

Stage	Required evidence	Decision owner
Qualify	Completed inquiry and feasibility gaps	Event lead
Estimate	Costed package and capacity check	Manager
Confirm	Customer approval using reviewed terms	Authorized manager
Freeze plan	Current guest count and production version	Event lead
Release	Final checklist and PIC controls ready	Event lead / PIC

- Use your existing professionally reviewed booking, payment, cancellation and change policies. This toolkit intentionally supplies no contract or deposit percentage.
- Set a documented deadline for final numbers and menu choices, then communicate it using your approved terms. Record late requests rather than silently absorbing them.
- Before approving a change, recheck ingredient availability, equipment, labor, transport space, allergens and the revised cost.
- Give the kitchen, service lead and driver the same dated version. Withdraw obsolete copies.
- If a payment or customer decision is missing, mark the status clearly and escalate under your booking policy. Do not imply the event is confirmed merely because a quote exists.

Example: an increase from 40 to 55 guests changes more than portions. Recheck vehicle capacity, serving equipment, staffing and the setup window before agreeing.

Build the run sheet backward from service

Start with the customer’s required ready-to-serve time. Work backward through venue access, unloading, travel, pack-out and preparation. Assign an owner and fallback to every dependency. These are scheduling milestones, not food-safety time limits.

Illustrative milestone	Owner	Verification
11:30 service ready	Event lead	Setup accepted
11:00 venue access	Venue contact	Access confirmed
10:15 departure	Driver	Route and load checked
Before loading	PIC / packer	Approved food controls checked

- Separate the food checklist from the equipment checklist. Count serving utensils, labels, containers, table items and returnable assets.
- Use the PIC’s approved transport and service procedures, including monitoring, corrective action and handoff records. Delivery guidance addresses packaging, temperature, contamination and allergen controls; a run sheet does not replace those procedures. (Source 2)
- Confirm the receiver’s name and phone number and the exact access point. Record arrival and handoff, not merely departure.
- Define the fallback for an inaccessible venue, late service, failed equipment or missing receiver. Escalate safety questions to the PIC rather than improvising.
- Record who retains custody of returnable equipment and when collection is expected.

Readiness check: can another trained lead execute the event using the final packet without searching old messages? If not, add the missing instruction or decision.

Close the event and improve the package

After service, collect actual labor, ingredient usage, rental changes, refunds, transport costs and customer feedback. Reconcile estimated versus actual direct contribution on the same basis. Retain payment and accounting records through your normal systems; do not place card details in these worksheets.

Illustrative review: the $740 direct-cost estimate becomes $800 after one extra labor allocation of $60. With unchanged revenue of $1,120, contribution falls from $380 to $320. The event was not necessarily unprofitable or profitable; this comparison only identifies the $60 variance before other costs.

- Log one operational cause for each meaningful variance: unpriced setup, longer travel, excessive portions, missing gear or a late scope change.
- Choose one fix with an owner and date. For example: require a venue-access check before quoting setup labor.
- Track on-time readiness as events ready by the agreed time divided by completed events. Record the cause of every late event.
- Track quote conversion only for decided quotes: won ÷ (won + lost). Keep pending quotes outside the denominator.
- Review guest feedback separately from safety incidents, which follow your established escalation procedure immediately.

Repeat for three comparable events before changing the standard package. Compare events with similar size and service format. A large wedding and a small pickup order should not share one labor benchmark.

Your next move: finish the inquiry, package and cost sheets for the next real inquiry. Do not wait until the event is booked to test feasibility.

Inquiry and feasibility worksheet

Use before preparing an estimate. Record customer contact details only in your normal access-controlled records. Event ID: _____ Date received: _____ Owner: _____

Question	Details / decision
Event date, venue and access point	_____
Service ready time / end time	_____
Guest count / format / budget range	_____
Menu interests / dietary requests	_____
Venue facilities / equipment available	_____
Setup, service and removal required	_____
Decision deadline / final-count deadline	_____
Contact record reference	_____

Feasibility: production ___ staffing ___ transport ___ venue permissions ___ PIC review ___

Open question: _____ Owner: _____ Due: _____

Decision: proceed to estimate / revise scope / decline. Reason: _____

Reusable package specification

Complete one sheet per service format. Package name: _____ Version/date: _____
Approved by: _____

Component	Standard specification
Service format and area	_____
Guest-count range and lead time	_____
Menu / recipe version / portions	_____
Included packaging and serving items	_____
Included setup / staffing / removal	_____
Exclusions and optional additions	_____
Capacity bottleneck / maximum	_____
Required venue conditions	_____

Dietary request process / responsible person: _____

Customer-facing description reviewed: ___ Cost sheet current: ___ PIC procedures linked: ___

Test event/date: _____ What failed: _____

Next revision and owner: _____

Internal event estimate and quote brief

INTERNAL PLANNING ONLY. Not a customer offer, agreement or acceptance form. Use separately approved customer terms. Event ID: _____ Version: _____ Currency: _____

Revenue or cost line	Basis / quantity	Amount
Planned event revenue	_____	_____
Food	_____	_____
Packaging / service supplies	_____	_____
Event-specific labor	_____	_____
Rentals / transport	_____	_____
Other direct costs	_____	_____
Total direct costs	Sum cost lines	_____
Direct contribution	Revenue − direct costs	_____

Excluded costs and accounting assumptions: _____

Lower guest-count / extra labor scenario: _____

Scope to include in approved quote: _____

Payment / cancellation / change policy reference: _____

Cost checked by: _____ Quote release approved by: _____ Date: _____

Final event plan and run sheet

Event ID: _____ Current version: _____ Lead: _____ Service date: _____

Final guest count: _____ Menu version: _____ Ready-to-serve time: _____ Venue access: _____

Milestone	Time	Owner	Evidence / fallback
Preparation complete	_____	_____	_____
Pack-out verified	_____	_____	_____
Departure	_____	_____	_____
Venue arrival / access	_____	_____	_____
Setup complete	_____	_____	_____
Service / handoff	_____	_____	_____
Removal / returns	_____	_____	_____

Venue contact reference: _____ Route / access instructions: _____

Latest change / cost impact / approval: _____

PIC-approved controls and records reference: _____

All affected staff received this version: ___ Obsolete copies removed: ___

Pack out handoff and return checklist

Event ID: _____ Packer: _____ Checker: _____ Vehicle / carrier: _____

Item / category	Required	Packed	Verified by
Food / menu portions	_____	_____	_____
Labels / order information	_____	_____	_____
Serving utensils / disposables	_____	_____	_____
Approved transport equipment	_____	_____	_____
Venue / service equipment	_____	_____	_____
PIC monitoring supplies / records	_____	_____	_____
Returnable items	_____	_____	_____

PIC release check completed per approved procedure: _____ Time: _____

Arrival: _____ Receiver record: _____ Handoff time: _____

Missing item / corrective action / responsible person: _____

Returnable equipment due: _____ Returned / checked: _____

Do not use this count sheet as a substitute for required food-safety records.

Event results and next improvement

Event ID: _____ Review date: _____ Lead: _____

Measure	Estimated	Actual	Reason for difference
Revenue, same accounting basis	_____	_____	_____
Food / packaging costs	_____	_____	_____
Event labor cost / hours	_____	_____	_____
Other direct costs	_____	_____	_____
Direct contribution	_____	_____	_____
Ready-to-serve time	_____	_____	_____

Customer feedback and source: _____

Operational issue to prevent next time: _____

One change: _____ Owner: _____ Due: _____

Package / estimate / checklist updated on: _____ Verified by: _____

Safety or serious service incidents were escalated through the established procedure: ___ / not applicable.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

Source 2 FDA: Food Safety Best Practices for Online Delivery Services

Delivery planning should address packaging, temperature control, contamination and allergen controls. Accessed 23 October 2026.

https://www.fda.gov/food/hfp-constituent-updates/fda-highlights-best-practices-food-safety-online-delivery-services

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.