

AN ALLEN PRESS SEMINAR

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BEST PRACTICES & INNOVATIVE SOLUTIONS

Site Plans & Work Crews: Meeting Management

Kate Counter, Meeting Manager

The most important factor in creating a successful meeting or event is:

ORGANIZATION

Foundation Decisions

- A major decision about the meeting that must be made before other decisions can be made.
 - Time
 - Location
 - Budget

Building a Task List

- Identify major categories & major tasks, then break down major tasks into minor tasks.
- Possible tasks include:
 - Location
 - Lodging
 - Food & Beverage
 - Audio/Visual
 - Programming
 - Registration



Example Task List Outline

1. Location

a. Select site

i. Research Locations

1. Make list of locations
2. Visit websites & review

ii. Get estimates

1. Develop & distribute RFP
2. Review submissions
3. Decide on finalists
4. Site visits to finalists

Building Your Timeline

- Timeline Steps
 1. Finalize your task list.
 2. Determine the order in which tasks should be completed.
 3. Identify any important deadlines.
 4. Estimate durations.
 5. Calculate your schedule backwards from the meeting date.

Preparing the Budget

- Keys to Budgeting Effectively
 - Have a strong task list.
 - Read contracts carefully.
 - Leave a 10% buffer.
 - Plan for commonly forgotten charges:
 - Service Fees
 - Tipping
 - Taxes
 - Labor Charges
 - Overtime



Cost-Saving Tips

- Plan early to avoid rush charges.
- Find sponsors to fund some of your program.
- Bring your own A/V equipment.
- Pick an off-season location.
- Negotiate with vendors for “freebies” such as Internet connections, staff lodging, welcome reception.

What is an RFP?



- *A Request for Proposal (RFP) is an invitation for suppliers, often through a bidding process, to submit a proposal on a specific commodity or service.*

-Wikipedia

What's in an RFP?

- An RFP should generally include information in these categories:
 - General Information
 - Proposal Submission & Deadline/Decision
 - Meeting History
 - Guest Room Requirements
 - Criteria for Site Selection
 - Additional Considerations
 - Space Requirements
 - Food & Beverage Requirements

What to do once your RFP is complete

- The easiest way to distribute your RFP is by sending it directly to the Convention & Visitors Bureaus in the cities that your group is interested in.
- As you get responses, post the most important information in a spreadsheet so that you can compare proposals side-by-side.

Keeping Track of Event Documents

- Create a Meeting Notebook with these dividers:
 - Contacts
 - Schedule
 - Venue
 - F&B
 - A/V
 - Budget
 - Contracts

Event Documents

- While it's OK to keep documents in a digital format, always keep printed versions on-hand while at the meeting.
- Do NOT let the meeting notebook out of your sight!
- If you plan to let others borrow the notebook, it would be best to make a second one that is available for check-out; that way, you will always have yours.

Working with Vendors

- Negotiating the Best Deal
 - Assume EVERYTHING is negotiable!
 - Always ask for extras.
 - Let them know you are shopping around.



Contracts

- Always get **EVERYTHING** in writing!
- Read every word of the contract. If you don't understand something, ask for assistance from someone with expertise in contracts.
- Designate who is authorized to make changes to the contract, orders, and charges.
- Vendor contracts generally protect the vendor – make sure your interests are protected as well.

Favorite Must-Have Contract Clauses

- Change in Management
- Guest Relocation
- Renovation/Remodeling
- Lowest Rate Guarantee



Change in Management

- *Hotel shall promptly advise the Group of any change in Hotel's management. This Agreement may be cancelled by the Group without penalty if there is any change in management of the Hotel, provided that the Group notifies Hotel of such cancellation in writing within 14 days after the Group is advised by Hotel of such change. If the hotel undergoes a change in management, the hotel will promise in writing that the level of service and expectation of the Group will remain the same.*

Guest Relocation

- *The parties agree that on occasions due to unanticipated circumstances, the Hotel may not have rooms available for all guests who wish to check in on a particular night. While Hotel will use reasonable efforts to avoid such situation impacting the Group, in the event any member of the Group with a confirmed reservation cannot be accommodated by the Hotel, the Hotel will provide the following:*

Guest Relocation (con't)

- *Accommodations at a comparable hotel as close as possible and at no charge to the guest for each night the guest is displaced from the Hotel.*
- *One complimentary round trip ground transportation between Hotel and the alternate hotel.*
- *The Hotel will make necessary arrangements for the displaced guest's telephone messages and mail to ensure that they are properly forwarded.*
- *The group will receive credit for any guests displaced toward its pick up for purposes of this contract.*
- *If a room becomes available at the Hotel for the displaced guest and the guest elects not to return to the Hotel, the Hotel will have no further obligations under this clause.*
- *When a room becomes available at the Hotel and the displaced guest returns, the Hotel will provide upgraded accommodations if available and provide the guest a welcome expression from the General Manager.*

Renovation/Remodeling

- *As of the date of the signing of this contract, Hotel has no plans for renovation or remodeling of any facilities which will be used by the Group pursuant to this contract, other than ordinary maintenance. In the event that after this contract is signed, the Hotel confirms any plans to remodel or renovate its facilities, the Hotel agrees to inform your group in writing within a reasonable amount of time of the following:*
 1. *Planned scope of project*
 2. *Schedule for commencement and completion*
 3. *Anticipated impact project will have on areas to be utilized by your group*
 4. *Hotel's plan for minimizing impact of project on group*

Renovation/Remodeling (con't)

- *Hotel's plan to renovate or remodel will not constitute grounds for termination of this agreement unless mutually agreed upon by both parties. The parties agree to negotiate in good faith to resolve any concerns raised as a result of renovation or remodeling and to enter into such amendments of this agreement as may be necessary to reasonably accommodate both parties' interests.*

Lowest Rate Guarantee

- *Convention Rates shall not be higher than rates confirmed to any other similar group scheduled to hold meetings at Hotel during Group's convention period, or any rate available via online booking/reservation websites. Should a lower rate be offered to other groups or the general public, Hotel will apply the lower rate to the Group's attendee's reservations.*

Contract Concessions

- Try to get 1:40 earned room nights.
- Try to get an 80% attrition rate.
- Ask for a substantial discount if you use the in-house A/V company.
- Ask for free room upgrades & amenities for VIP's.
- Get meeting space rental fees waived with achievement of guest room block and F&B minimum.
- Free/discounted parking or airport shuttle.

Other Tips



- Contract with venues as far out as possible.
- Sign multi-year contracts with vendors.

Managing Registration

- The easiest way is to hire someone to manage registration for you.
- If that's not in your budget, you can make a Word or pdf form to post on your website that attendees can complete & return—info can manually be entered into a spreadsheet.
- If you want to use an online method, you can create a Google Docs spreadsheet & form to gather your attendee's information, with the link posted on your website.

Registration Tips

- The ideal number of registration staff to attendees is 1:100—no more than 1:150, if possible.
- Pre-stuff registration packets prior to shipping to avoid last-minute craziness on-site at the venue.
- My preferred vendor for badge holders, inserts, lanyards, and ribbons is **pc/nametag**:
www.pcnametag.com
- I use Avery-Dennison's "Design Pro 5" for designing badge inserts.

Registration Supplies

- Make a supply box to keep at the desk:
 - Extra blank registration forms & badge stock
 - Pens
 - Cheap ones that are OK to walk off
 - Various colors for you & your documents
 - Clipboards
 - Stapler & staples; binder &/or paper clips
 - Post-its in various sizes
 - Scissors/box cutters
 - Packing tape
 - Push pins

Helpful Hints & Reminders

- Service fees are taxable!!!
- File for tax-exempt status.
- Know your shipping account numbers &/or take waybills with you to the meeting to make shipping supplies back to the office easier.
- Make signage for the registration desk that outlines your hours of operation.
- Make daily At-A-Glance schedules to post at the registration desk or other places around the meeting site.
- Invest in meeting/event insurance.

Questions

