

MEETING PLANNER REFERENCE GUIDE

1) Types of Meetings

a) Monthly Meetings

- i) Monthly meetings are a type of meetings that usually remains consistent in times, location and agenda. Often speakers and agendas are planned a year in advance and placed on the association calendar. The following are things to keep in mind when planning a monthly meeting.
- ii) Identify your purpose or the theme of the meeting:
 - (1) What are you trying to accomplish?
 - (2) What messages do you want to communicate?
 - (3) When and where will the meeting be held? (it is helpful and cost effective for the time and location to remain consistent from month to month)
 - (4) What speakers will be presenting? What members will be participating?
- iii) Have a set agenda. Keep it short and to the point (usually just one page) but be sure to include the following:
 - (1) Logistical information such as time, date, length and location.
 - (2) Expected attendees and their roles during the meeting.
 - (3) What participants should have with them.
 - (4) Agenda items – next to each item, list the participant who will present the topic.
- iv) Ask meeting presenters what types of audiovisual equipment they plan to use. If they are unsure, find out what they want to achieve in their presentation in order to assist them.
- v) Consider reimbursing guests for parking ramp costs or providing valet services. Other essential details include:
 - (1) Providing name cards.
 - (2) Taking minutes – find someone to take them or use a tape recorder.
 - (3) Finding ways to liven up the meetings and keep them engaging.
 - (4) Evaluating your success or things up won which you could improve by preparing a short meeting evaluation form.

b) Destination Events

- i) Destination events put guests in a fresh state of mind and are usually designed to show appreciation for employees, customers or suppliers. They provide an excellent incentive for employees who can often combine events with a family vacation, or they can offer respite for a focused, creative business meeting. When planning a destination event, it is important to keep in mind the following:
 - (1) Be sure to schedule a wide variety of activities to accommodate all guests' interests and offer activities for the guests' families, such as sightseeing tours, spa activities, golf lessons and park admissions.
 - (2) Schedule meetings in the morning and leave afternoons and evenings free for families to enjoy the destination location.
 - (3) If the event requires a hotel stay, arrange for certain amenities and touches. Ask about a complimentary welcome reception, complimentary gifts or welcome baskets.
- ii) Golf Events
 - (1) Golf events require special planning, a lot of lead time and an eye for detail. Most golf courses have a staff to help planners prepare, but the following is a list of things to remember when planning a corporate golf event.

- (a) Know what kind of course fits your guests. The difficulty of the course should be relative to the experience of your players to avoid intimidating those with lesser ability. When grouping your players, be sure and intersperse skill levels.
 - (b) Set your dates well in advance. For corporate events, plan one year or more in advance, but remember that rates change every year and may not be set when you book your event.
 - (c) Clearly define how costs will be covered between you and the course and you and the attendees.
 - (d) Providing a meal is expected at a corporate golf event, be it a boxed lunch on the course or a sit-down dinner. Ask the course's restaurant manager to aid in suggesting meal options and selecting a menu that fits your group.
 - (e) Courses provide event or tournament packages that can include anything from greens fees and cart fees to logo balls, yardage books, bag tags and tournament fees. Speak with a course's sales representative about package specifics. Work with the course's golf pros for help coordinating field events and contests, grouping players and assisting on the course.
 - (f) Check in with the course two to three weeks prior to your event to finalize details and to confirm reservations, numbers and amenities.
- c) Trade Shows
- i) Planning for trade shows can be a difficult enterprise, involving anywhere from six months to six years of advance planning. However, with detailed outlines and a little homework, you can ensure that you select the right forums and have spectacular results
 - ii) Trade Show Checklist:
 - (1) 6-2 years in advance: Investigate potential sites, factoring in exhibitor needs. Establish a budget.
 - (2) 1 year to 6 months: Inspect the site and gather information on host city activities, plus medical and safety facilities. Check into citywide transportation options.
 - (3) 1 year: Assemble a planning committee, and create a tentative show itinerary. Initiate marketing efforts for both attendees and exhibitors.
 - (4) 10 months: Develop program topics and select speakers, caterers, videographers, etc.
 - (5) 9-8 months: Send reminders to speakers regarding dates, A/V requirements and hold initial pre-con meetings with facility staff and key vendors.
 - (6) 7 months: Assign sessions to rooms. Finalize banquet and hospitality arrangements.
 - (7) 6 months, 2 weeks: Order mailing lists, labels and name tags.
 - (8) 5 months: mail brochures, register attendees
 - (9) 2 months: Draft set up instructions. Order signage and shuttles. Confirm contacts with hotels, conference spaces, vendors, speakers, etc. Finalize exhibitor list.
 - (10) 3 weeks: Have programs printed and prepare attendee packets.
 - (11) 4 days: Conduct a final facility walk-through. Hold final pre-con meeting with facility staff and confirm meal and attendee counts.
 - (12) Day of event: Arrive early to meet vendors. Set up registration and signage and ensure all is ready.
- d) Networking Events
- i) With networking events, the challenge for meeting planners lies in creating an event that is productive, painless and fun. Event planners say the key things to keep in mind when creating a successful networking event is to have the planning time to do it right and to make sure the results measure up to the anticipation. Planning can be broken down simply

- to the venue, the food and the event's process. The following lists some tips to remember for these basic components.
- ii) Venue:
 - (1) Be sure the venue has easy access such as valet parking and is held at a convenient time of day.
 - (2) Avoid formal seating to encourage mingling
 - (3) Consider an entertainment venue such as a sporting event to start people talking.
 - iii) Food
 - (1) Serve interactive food such as fondue, or try "action stations" (mashed potato bars, fajita bars, etc.) to encourage conversation
 - (2) Make sure the food does leave leftovers in guest's hands, such as a skewer.
 - (3) Alcohol is common at networking events. Be sure bartenders don't over-serve and consider staying away from hard alcohol in favor of a wine-and-cheese event or having a cash bar.
 - iv) The Process
 - (1) A check-in attendant is useful to guests to explain the event and pass out an agenda.
 - (2) Make sure your host meets and greets as many guests as possible.
 - (3) Name tags help to facilitate introductions and aid in approachability.
 - e) Large Special Events
 - i) Planning for special events often has a very long lead time – several months, sometimes years. Therefore, it's important to have a set timetable as there are more specialized and diverse responsibilities. For large events, such as parades or outdoor festivals with many attendees, there are a few important considerations:
 - (1) Begin the planning process two, three, or even five years in advance of the event
 - (2) Coordinate with local convention and visitors bureaus, as often they are a great resource for accommodations or other information.
 - (3) Coordinate with the many vendors and suppliers that are involved, such as sanitation crews, city councils and governmental institutions that may need to grant permission.
 - ii) Arranging a large event while working with local governmental agencies requires certain understandings of how government operates. All governmental offices will have their own nuances and procedures for partnering with planners, but here are a few constants to keep in mind:
 - (1) Anticipate that working with governments can be complicated.
 - (2) Understand the many layers of departments and organizations that need to be consulted, at both the state and local level.
 - (3) Most importantly, anticipate time delays, as permission must be arranged with numerous agencies, and often there are lengthy processes for petitioning and applying.

2) Budget Thoughts

- a) Possible items needed for a meeting to include in a budget:
 - i) Activity fees
 - ii) Audio taping
 - iii) Audiovisual equipment
 - iv) Audiovisual specialist (production and or specialists)
 - v) Communications - phones, radios, pagers
 - vi) Computer needs onsite – data lines, equipment, staff, and supplies
 - vii) Comp registrations (if charging)
 - viii) Decorations
 - ix) Destination management companies

- x) Electricity
- xi) Email Kiosk, or internet for attendees
- xii) Entertainment
- xiii) Equipment
- xiv) Facility Rental
- xv) Flowers
- xvi) Food and Beverage
- xvii) Freight shipping and receiving charges
- xviii) Gifts (Thank you)
- xix) Giveaways – promotional
- xx) Insurance (liability, dramshop, cancellation)
- xxi) Labor costs
- xxii) Mailing, postage, and overnight services
- xxiii) Marketing and promotion
- xxiv) Meeting expenses (internal planning or committee meetings)
- xxv) Meeting Supplies (ads, envelopes, letterhead, posters, materials)
- xxvi) Office/meeting room furniture rental
- xxvii) Personnel salaries and benefits
- xxviii) Phone and Fax
- xxix) Photography
- xxx) Plaques and Awards
- xxxi) Printing, layout and design work
- xxxii) Public Relations
- xxxiii) Registration – online and manual
- xxxiv) Rental cars/vans (for staff)
- xxxv) Security
- xxxvi) Service fees, gratuities and taxes
- xxxvii) Signage
- xxxviii) Staff costs
- xxxix) Supplies (pens, paper, scissors, etc.)
- xl) Temporary help
- xli) Tent rental
- xl ii) Tickets (social outings, drink tickets, food vouchers)
- xl iii) Transportation
- xl iv) Venue rental outside of meeting
- xl v) Website

3) Room set up/layout

- a) Diagrams with each description
- b) Descriptions
 - i) Classroom
 - (1) Positives: Participants can spread out, take notes; room for laptops; optimal viewing of screen, or a speaker at a podium or on an elevated platform.
 - (2) Negatives: Interaction with other attendees is limited.
 - (3) Notes: Allow at least 2 feet of space per person; allow at least 3.5 feet between tables.
 - ii) Theater or Auditorium
 - (1) Positives: Easy to rope off back rows for latecomers. Since there are no tables in this setup, it maximizes the number of participants.
 - (2) Negatives: Interaction with other attendee is limited.

- (3) Notes: Aisles should be at least 4 feet wide; front row should be 6 to 9 feet wide; front row should be 6 to 8 feet from stage/podium/screen.
- iii) Crescent Rounds
 - (1) Positives: Ideal for breakout sessions, luncheon meetings, networking and note taking.
 - (2) Negatives: Viewing can be difficult from some seats.
 - (3) Notes: Allow at least 5 feet between tables; 5 seats at a 60-inch table; 6 seats at a 66-inch table; 7 seats at a 72-inch table.
- iv) Board of Directors
 - (1) Positives: Participant interaction is optimum for this setup. Many hotels have a dedicated boardroom.
 - (2) Negatives: Not preferred for A/V presentations.
 - (3) Notes: Allow 2 to 3 feet of space per person; keep chairs at least 1 foot from shared corners.
- v) U-Shape
 - (1) Positives: works well for speaker interaction or visual aids.
 - (2) Negatives: Limits group interaction.
 - (3) Notes: Allow 2 to 3 feet of space per person and keep chairs at least 1 foot from shared corners.
- c) Checklist
 - i) When selecting a space, be sure to consider the following:
 - (1) Meeting objectives
 - (2) Room temperature
 - (3) Ventilation
 - (4) Appearance
 - (5) Cleanliness
 - (6) Comfort level
 - (7) Traffic flow
 - (8) Restroom accessibility
 - (9) Food and beverage convenience
 - (10) Lighting
 - (11) Noise level
 - (12) Sound system
 - (13) Room acoustics
 - (14) Allow ample time for required setup (from several hours to several days, depending on your situation). Factors include the amount of staging an event requires to A/V or other technological needs.
 - (15) If the size of your group is larger than expected, make sure the facility can accommodate by adding extra chairs, extra breakout rooms, etc., and how it could affect your cost.
 - (16) If the size of your group is smaller than expected, find out up front if the facility can adjust your meeting space accordingly.
 - (17) Ask about other groups meeting at the same time and at the same facility. Will it adversely affect your setup/event?
 - (18) Set up your room in a way that minimizes disruptions from latecomers, or take into account whether or not people will be entering and exiting throughout the event.
 - (19) Pay attention to dropped ceilings, light fixtures, pillar placement and other potential viewing obstructions.

4) Food and Beverage

a) Estimating alcoholic beverage counts

- i) Number of drinks per bottle (be sure to confirm glass sizes and/or average pours, as they can vary from location to location)

5) LIQUOR	6) OUNCES	7) NO. 1-OZ DRINKS	8) NO. 1.25-OZ DRINKS
9) 750ml	10) 25.3	11) 25	12) 20
13) Liter	14) 33.8	15) 33	16) 27
17) WINE	18) OUNCES	19) NO. 5-OZ DRINKS	20) NO. 5.5-OZ DRINKS
21) 750ml	22) 25.3	23) 5	24) 4.6
25) Liter	26) 33.8	27) 6.7	28) 6.1
29) Magnum	30) 51.2	31) 10.2	32) 9.3

- i) The following formula can help you determine the estimated number of bottles that will be consumed in a properly monitored and controlled bar:

- (1) Using liters of liquor as an example, and using the assumed average of 2.5 drinks per person: Multiply 2.5 (drinks per person) by the number of attendees (let's assume 200), then divide by 27 (the number of 1.25-ounce drinks in a liter of liquor) 2.5×200 attendees / 27 = 18.5 liter bottles
- (2) Note: Some hotels may allow you to "marry" partial bottles and give you a credit for full bottles. This would limit the partial bottles that remain after your function and help reduce overall cost.

- ii) There are a variety of ways to host beverages at a reception:

- (1) *By the bottle*: This usually applies to hard liquor and wine. It is the most economical for large parties. Choices range from house brands to top shelf bottles. Make sure mixers and garnishes are included in the bottle price.
- (2) *By the drink*: Pay by what is consumed or ordered. Usually guests are limited and receive drink tickets. When the guest is out of tickets, then they pay for their own drinks.
- (3) *Per person*: A set amount is paid per person per time limit.
- (4) *Hosted bar*: Beer and wine are complimentary, and the attendee pays for hard liquor and mixed drinks.
- (5) *Cash bar*: Guests pay for drinks, but the host may have to pay for the bartender. For every 75 people, there should be one bartender. Many times the facility will waive the bartender fee with a minimum amount sold, often between \$350-500.
- (6) *Waitered served drinks*: This is a great option when serving champagne or wine as guests enter. It works well for a short reception and is cost effective.

b) Planning breaks

- i) 90 percent of morning attendees drink hot beverages.
- ii) 60 percent of afternoon attendees drink cold beverages.
- iii) Outdoor breaks increase cold drink consumption by 10 percent and decrease hot beverage consumption by 10 percent.
- iv) Coffee can be purchased by the gallon or half-gallon.
- v) There are 20 cups per gallon (15 cups per gallon for mugs)
- vi) Brewed decaf (with signage) should be available.
- vii) Soft drinks are always ordered on a consumption basis (meaning you only pay for what is consumed).
- viii) The hotel should provide signage specifying that the break is for your group.

c) How much should I order?

- i) Dry snacks – 1 ounce per person
- ii) Anchor foods (cheese, vegetables, fruits) – enough for 1.3 of the attendees
- iii) Action stations (carving and/or pasta stations) – enough for ½ to 2/3 of the attendees
- iv) Passed hors d’oeuvres – 1 of each for all attendees.
- v) Dessert and coffee – enough for 1/3 to ½ of the attendees

5) Guest Rooms Checklist

- a) Be conscious of the fact that room block dates do not always coincide with meeting dates. Attendees may need to arrive a night early or leave a day later.
- b) Be realistic with your room blocks. Hotels have attrition clauses which can cost your company money.

6) Negotiation Checklist

- a) Guest Rooms
 - i) Rates
 - ii) Comp ratio
 - iii) Option/cut-off dates
 - iv) Suites/upgrades
 - v) Check-in times
 - vi) Guarantees/deposits
 - vii) Overflow
 - viii) Attrition/slippage
 - ix) Reservation cards
 - x) In-room amenities
 - xi) Turndown service
- b) Meeting and Exhibit Space
 - i) Meeting room rental
 - ii) Receiving/storage
 - iii) Set-up charges
 - iv) Specific meeting space (quality, size)
 - v) Table/drape/skirting charges
 - vi) Pads, pens, candy
 - vii) Electrical service
 - viii) Audio visual equipment
- c) Food and Beverage
 - i) Menu items/prices
 - ii) Price structures
 - iii) Gratuities/service charges
 - iv) Corkage fees
 - v) Guarantees/cut-off dates/attrition
 - vi) Restaurant/bar/room service hours
 - vii) Table décor/themes
- d) Extras
 - i) Parking – Free in Bloomington
 - ii) Airport shuttle
 - iii) Newspapers
 - iv) Delivery services
 - v) Collateral materials (coupon books)
 - vi) Copying/faxes
 - vii) Local phone calls

- viii) Pages/radios/computers
- e) Contract Clauses
 - i) Cancellation
 - ii) Attrition
 - iii) Acts of God
 - iv) Indemnification/hold harmless provisions
 - v) Resort fees
 - vi) Early departure fees
 - vii) Tax on gratuities