

CDC/OER/Meetings and Conference Management

OUTLINE

1. STRATEGIC EVENT PLANNING PROCESS

- a. **Determining the purpose of the meeting (event)**
 - i. Goals and objectives of the host organization
 - ii. Goals and objectives of the meeting/event
- b. **Identifying relationship of meeting (event) to organizational strategy**
 - i. Working with organization staff and/or volunteers (unpaid staff)
 - ii. Whether the event is being produced by the organization itself or by a third party
 - iii. Strategic partnerships and alliances
 - iv. Role of the event in the event host's financial picture (e.g., the budgetary philosophy of the organization)
- c. **Identifying stakeholder needs, expectations, and desired outcomes**
 - i. Characteristics and demographics of meeting participants, including whether they are required to attend or not
 - ii. Market analysis
 - iii. Awareness of cultural diversity issues (e.g., accessibility, holidays, food preferences, protocol)
 - iv. Roles and responsibilities of stakeholders
- d. **Preparing program outline (e.g., topics, content, potential speakers)**
 - i. Characteristics of types of meetings (events)
 - ii. Program formats (e.g., colloquium, seminar, workshop)
 - iii. Adult learning principles
 - iv. Meeting (event) agenda
- e. **Obtaining and analyzing statistics and historical information related to meetings (events)**
 - i. Methodology for data collection
 - ii. Quantitative data
 - iii. Qualitative data
- f. **Design program details that meet needs of participants**
 - i. Learning styles
 - ii. Needs assessment
- g. **Identify successful criteria for evaluation of meeting (event)**
 - i. Who defines success (e.g., board of directors, customers, conference coordinator, exhibitors, suppliers, attendees?)
 - ii. How to evaluate
 - iii. What to evaluate, including goals and objectives of the meeting (event)
 - iv. When to evaluate
 - v. Return on investment (ROI)
- h. **Preparing comprehensive timeline (project plan) for meeting (event)**
 - i. Steps to consider (planning timeline, event timeline, post-event timeline)
 - ii. Required time for each step (lead time)
- i. **Preparing meeting (event) specifications**
 - i. Meeting specifications (e.g., dates, times, number and type of guest rooms, meeting rooms)
 - ii. How to use a specifications guidebook
- j. **Developing marketing plan for meeting (event)**
 - i. Integrated marketing plan components (e.g., advertising, direct mail brochures, publicity, sponsorship)
 - ii. Market research questions
- k. **Assessing technology requirements**
 - i. Technology resources (e.g., using the Internet for research, communication, e-commerce)
 - ii. Hardware (e.g., PCs, servers, printers, digital cameras) and tools (e.g., cell phones, two-way radios, fax machines, pagers)
 - iii. Software applications (e.g., site selection, rating forms, match-making programs, audience response, database management)

- iv. Security and safety concerns (e.g., firewalls, password protection, back-up technology)
- I. Creating marketing materials for the meeting (event)**
 - i. Content for marketing materials
 - ii. Production of marketing materials
 - iii. Production of on-site materials
- m. Creating, leading and managing project team**
 - i. Selection, identification, formulation
 - ii. Delegation
 - iii. Communication skills (written, oral, visual)
 - iv. Interpersonal skills

2. FINANCIAL AND CONTRACT MANAGEMENT

- a. Identifying ancillary revenue sources and/or cost savings opportunities**
 - i. Sponsors
 - ii. Advertising
 - iii. Exhibitors
 - iv. In-kind, barter, trade-out
 - v. Rebate and/or assessment
- b. Developing budget for meeting (event)**
 - i. Currency conversions
 - ii. Budgeting methods (e.g., zero-based budget)
 - iii. Forecasting of revenues and expenses
 - iv. Cost categories (e.g., fixed, variable, direct, indirect)
 - v. Accounting fundamentals (e.g., balance sheet, income statement)
 - vi. Data that will support the budget (e.g., past event information, number of participants)
- c. Determining fees for participation, if any**
 - i. Break-even analysis
 - ii. Costs per person
 - iii. Fixed and variable costs
 - iv. Perceived value and/or return on investment
- d. Conducting Request for Proposals (RFP) process**
 - i. Components of an RFP (e.g., information to give to a facility)
 - ii. Criteria to determine the individuals within an organization that should review responses received
 - iii. Process for conducting the review
 - iv. Criteria for selection of the supplier
 - v. Techniques for obtaining bids
- e. Negotiating contracts**
 - i. Components of and terminology of contracts including fine print and references to other documents
 - ii. Value of program components; opportunities for possible negotiation
 - iii. Contract agreements (e.g., terms, conditions)
 - iv. Legal implications (e.g., financial, liability, risk, attrition; Sarbanes Oxley equivalents; privacy laws)
 - v. Methods of dispute resolution
- f. Securing appropriate types and amounts of insurance**
 - i. Types of insurance (e.g. liquor liability, event cancellation, general liability, fire / legal liability)
- g. Managing resources within budgeted guidelines**
 - i. Cost containment
 - ii. Room pick-up
 - iii. Modification of the budget plan
 - iv. Expenditure approval process
- h. Ensuring completion of the payment and/or billing processes**
 - i. Billing timetable
 - ii. Gratuities/tips/service charges
 - iii. Reconciliation of master bill
 - iv. Processing of invoices

- v. Taxes (e.g., VAT, tax exempt status)

3. FACILITIES AND SERVICES

a. Determining the appropriate geographic location for the meeting (event)

- i. Peak and off-seasons for geographic areas, domestic and international
- ii. Holiday calendars and seasonality considerations
- iii. Competing events
- iv. Support services from the Convention and Visitors Bureau/Tourism Board
- v. Special planning considerations for international meetings
- vi. Who attendees are and their demographics
- vii. Impact of transportation costs
- viii. Accessibility by various types of transportation (e.g., group, air)
- ix. Infrastructure of location (e.g., public transportation, taxis)
- x. Cost factors that influence the decision (e.g., transportation costs)
- xi. Tying the location to the goals and objectives of the meeting
- xii. Union considerations
- xiii. Internet resources

b. Determining the appropriate venue for the meeting (event) (e.g., hotel, convention centre, conference centre)

- i. Tying the venue/facility to the goals and objectives of the meeting
- ii. Differences among types of venues/facilities
- iii. Venue/facility services
- iv. Union considerations
- v. Accessibility issues
- vi. Internet resources

c. Identify the types of services required for a successful meeting (event)

- i. Registration staff
- ii. Exhibition services contractor
- iii. Decorator
- iv. Audiovisual (A/V)
- v. Transportation
- vi. Security
- vii. Catering
- viii. Guest programs
- ix. Special events
- x. Destination management company (DMC/PCO)
- xi. Recreational activities
- xii. Exclusive vendors/tying
- xiii. Production companies
- xiv. Entertainment and/or speakers
- xv. Translation/interpretation services

d. Conducting site inspection to determine viability of location and venue including potential offsite activities

- i. Site inspection process
- ii. Convention and Visitor Bureau/Tourism Board
- iii. Ethical business practices

e. Conducting a pre-meeting (event) briefing (pre-con) with suppliers and facility providers [2-3]

- i. Identification of briefing participants
- ii. Topics to be covered (e.g., expectations, VIPs, Banquet Event Order [BEO] changes, program overview)
- iii. Review of event specifications guide

f. Coordinating security procedures with venues

- i. Crisis management plan
- ii. Emergency plan
- iii. Special needs (e.g., protestors, VIPs)

g. Planning, ordering, and overseeing technology requirements for the meeting (event) [2-3]

- i. Hardware and software requirements
- ii. Web-based reservation tools
- iii. Web-based conferencing tools and techniques
- iv. Audience response systems
- v. Audiovisual (A/V) including Wireless Internet audience response systems
- vi. Electrical power requirements
- h. Conducting a post-meeting (event) review (post-con) with suppliers and facility providers**
 - i. Identification of review participants
 - ii. Topics to be covered (e.g., final billing, lessons learned, recommendations)

4. LOGISTICS

- a. Establishing invitation and/or registration procedures for the meeting (event)**
 - i. Pre-registration delivery options (e.g., fax, phone, on-line, paper)
 - ii. On-site registration operations
 - iii. Registration software options
 - iv. Special requirements of attendees (e.g., accessibility, allergies, special needs)
 - v. Pre-selection of specific sessions and functions by attendees
 - vi. Payment procedures and/or options
 - vii. Emergency contact information from attendees
 - viii. Cancellation and no-show penalties (e.g., credit issues)
 - ix. Attendee policy
- b. Assessing risk management issues in order to determine needed insurance and operations**
 - i. Internal communications plan
 - ii. Risk management issues (e.g., fire safety, emergency action plan, serving alcohol)
- c. Determining exhibitor booth assignments and setup process for exhibits**
 - i. Exhibit prospectus
 - ii. Service contractors
 - iii. Union guidelines
 - iv. Lead retrieval systems
 - v. Space usage requirements
 - vi. Booth and/or stand types
 - vii. Exhibit service kit
 - viii. Booth assignment techniques (e.g., first -come-first -serve, priority points)
 - ix. Security
 - x. Physical setup and dismantle
 - xi. Exhibit rules
- d. Securing transportation arrangements for the meeting (event)**
 - i. Tour and travel agency services
 - ii. Official service providers (e.g., airline, car rental, shuttles, limos)
 - iii. Destination management company (DMC) and/or professional conference organizer (PCO)
- e. Managing the housing reservation process**
 - i. Incentives for booking the block
 - ii. Reservation review date
 - iii. Cut-off date
 - iv. Rooming list
 - v. Third-party housing (e.g., housing bureau, housing services)
 - vi. Housing form
 - vii. Self-made reservations
 - viii. Room guarantees
 - ix. Attrition clauses
 - x. Tracking housing pick-up reports including audit and verification
 - xi. Technology-based tools to manage housing
- f. Identifying security measures required for each facility and/or meeting (event)**
 - i. Level of security associated with meeting (event), attendees, and/or sponsoring organizations
- g. Communicating travel arrangements for participants to get to and from an event site**
 - i. Group policies

- ii. Staff travel
- iii. Ground transportation options for attendees
- iv. VIP travel
- v. Cut-off dates
- vi. Discounts
- vii. Visa, immigration, and currency
- h. Managing all aspects of food and beverage functions**
 - i. Service styles (e.g., American service, English service, butler style)
 - ii. Menu planning
 - iii. Types of functions (e.g., buffet, breaks)
 - iv. Types of beverage service (e.g., cash bar, combination bar)
 - v. Recycling including for non-human consumption; handling of containers
 - vi. Room setup
 - vii. Special dietary needs (e.g., kosher, vegan)
 - viii. Banquet Event Orders (BEOs)
 - ix. Guarantees
 - x. Food trends
- i. Preparing and reviewing housing reports in a timely manner**
 - i. Components of a housing report (e.g., types of rooms blocked, number of meeting rooms used, overall attendance)
 - ii. Timing of a housing report
 - iii. Housing pickup report
 - iv. Attrition clause
- j. Determining the setup for function rooms including seating and audiovisual (A/V) requirements**
 - i. Meeting space assignments
 - ii. Setup configurations (e.g., chairs, tables, audiovisual (A/V), staging)
 - iii. Function room space requirements
 - iv. Food and beverage function seating requirements (e.g., how many chairs)
 - v. Seating arrangements (e.g., protocol)
 - vi. Types of tables and chairs
 - vii. Accessibility requirements
 - viii. Equipment requirements in relationship to room setup (e.g., audiovisual (A/V), sound)
- k. Coordinating the shipping of materials to and from the meeting (event) site**
 - i. Freight carriers/freight forwarders
 - ii. Customs brokers
 - iii. Private couriers
 - iv. Common carriers
 - v. Truckload or less -than-truckload (LTL) – *refer to APEX Glossary*
 - vi. Packing lists
 - vii. Labelling and packing
 - viii. Tracking and tracing
- l. Tracking and recording continuing education credits earned**
 - i. Certificate of attendance
 - ii. CEU/CLE/CME policies and procedures
 - iii. Attendance tracking software

5. PROGRAM

- a. Reviewing goals of meeting and determine details of program to meet those goals**
 - i. Advisory committees
 - ii. Supplier feedback
 - iii. Client and/or sponsor feedback
 - iv. Attendee feedback
 - v. History of previous meetings
- b. Securing speakers**
 - i. Types of speakers
 - ii. Speakers bureaus

- iii. Knowledge experts
- iv. Industry trends
- c. Manage the contractual relationship with speakers**
 - i. Intellectual property rights (e.g., audio tapes, handouts reprinted in proceedings)
 - ii. Marketing speaker products (e.g., books, tapes, recordings)
 - iii. Contractual fulfilment
 - iv. Speaker ready room
- d. Securing entertainment for the meeting (event) (e.g., music, artists)**
 - i. How to deal with agents and promoters
 - ii. Production companies
 - iii. Music licensing
 - iv. Service providers
 - v. Contractual fulfilment
 - vi. Rehearsals
 - vii. Green rooms
- e. Determining food and beverage arrangements that support program objectives**
 - i. What meals and breaks need to be covered?
 - ii. How to determine quantities required
 - iii. Costs associated with food and beverages
 - iv. Food and beverage formulas (e.g., drinks per person)
- f. Arranging ancillary programs in conjunction with the meeting (event) including pre-and post-meeting activities**
 - i. Sightseeing tour programs
 - ii. Educational seminars
 - iii. Guest programs
 - iv. Children's programs including day care
 - v. Liability insurance
- g. Determining audiovisual (A/V) needs**
 - i. Cost of audiovisual (A/V)
 - ii. Audiovisual (A/V) formulas (e.g., where to place a screen)
 - iii. Types of audiovisual (A/V) equipment
 - iv. How to determine size and/or quantities based on room size and setup
 - v. Audiovisual (A/V) equipment terminology (e.g., brand names used in place of generic terms)
 - vi. Technology capabilities
- h. Arranging media and public relation activities for the meeting (event)**
 - i. Industry and local media
 - ii. Press releases
 - iii. Press conferences
 - iv. Press room