

Effectiveness in Planning Major Events

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One hour does not really allow enough time for a complete overview of event planning which includes the topics you see on the screen—and more.

- Audiovisual
- Budgeting and Financial Management
- Committees, Volunteers, and Staff
- Contracts and Liability
- Convention and Visitors Bureaus
- Emergencies
- Exhibits
- Food & Beverage
- Goals & Objectives for Meetings
- Housing
- Marketing & Promotion
- Meeting Evaluation
- Program Planning
- Registration
- Site Selection
- Space Use and Setup
- Suppliers and Third Party Vendors
- Transportation

Any one of these topics could be broken down into its own presentation. Today we will briefly focus on several topics that I consider critical to a successful event. Let's get started!

Event Goals are *broad statements of the purpose for your event, and often an extension of the organization's mission statement*. **Event Objectives** are defined as *clear statements of anticipated results*.

You will want to ask the five W's when establishing your Event Goals and Objectives:

Who? Who will attend this event? Committee members? People with an interest in the topic? Young people? Old people? Families?

What? What type of event are you planning? A training event? A Committee where decisions will be made? A youth event? A Women's meeting? A health conference?

When? Is this an annual event with firm dates? Are your selected dates over a PEAK season in the hospitality industry? Are dates flexible?

Where? Will you meet domestically or internationally? Do you have your own meeting space or must you rent a venue? Do you need a conference center, a sports arena, or meeting space in a hotel? How does the location of the meeting fit into your overall budget?

WHY? Why do we need to meet? Could we consider videoconferencing instead? What will make people want to attend in person?

Planning Committee

Once you have determined the goals and objectives for your event you need to work on the team or committee who will assist you in the planning. For instance, the GC Session Planning Committee has 27 sub-committees each with their own terms of reference and areas of responsibility for the event. Your event may be much smaller than a GC Session but it is still important to break up the responsibilities for planning into sub-committees and include people with knowledge of the event and/or service required to fulfill the needs of the event. For instance, you may want to include the following sub-committees:

- Audiovisual Committee
- Communications Committee
- Exhibit Committee
- Finance Committee
- Food Service Committee
- Information Technology Committee
- Music Committee
- Procurement/Shipping Committee
- Program Committee
- Security Committee
- Transportation Committee

These are just suggestions for sub-committees—your goals and objectives will likely determine which sub-committees will be needed for your specific event.

Remember—It takes a village to pull off an event!!!

Budget

The development of an event budget is second only to the goals and objective planning. Some events are fully funded by the organization while others produce income through registration fees or sales. Regardless of which type of event you may be planning, the FINANCIAL GOAL is to come in at or under budget. No exceptions. This requires PLANNING for the expected and the unexpected.

“A man who does not plan long ahead will find trouble at his door.”

- Confucius

There are many event budget templates available in the internet that can be very useful in developing your event budget. A repeat event is much easier to develop a budget for since you have event history to base it on. You are playing a guessing game when planning a first-time event. Try to obtain quotes and be as realistic as possible when creating an event budget. ALWAYS include a contingency line item for emergency funds.

Your budget could include the following line items, or others more specific to your event. They are in alphabetical order—not necessarily the order of preference.

- Audio-Visual
- Contingency
- Exhibits
- Food and beverage
- Furniture rental
- Housing
- Labor & Handling
- Marketing
- Materials
- Presenter Expenses
- Program
- Security
- Short-term travel insurance for all participants
- Technical Staff Expenses
- Transportation
- Venue rentals
- Video Production
- Volunteer Expenses

These, of course, are all expense items. IF you anticipate revenue from your event through registration fees or onsite sales you will also need to include a column for INCOME in your budget.

Once you have a final budget in place it will be your job to MANAGE that budget. You may need to make line item adjustments along the way but still maintain the same bottom line.

Your budget should also include a column for ACTUALS—what is actually spent for each line item. This will help you quickly determine where you came in under budget? Over budget? Again, this is invaluable information to create event history.

Site Selection

Site Selection is critical to the success of your event. Rental of meeting space, housing, transportation, food and beverage, and security are all big ticket items in your budget and will be impacted by the site selected for the event. Things to consider here are:

- What is the air lift or drive time for the city you are considering—if you anticipate people flying or driving in.

- Is there a convention center or hotel with meeting space adequate for the needs in the city?
- Must you meet in a first-tier city with everything on your wish list but higher rates, or could I consider a smaller second or third tier city?
- Is this a labor union city? If so, you will need to consider the additional cost of labor union workers to perform specific tasks or shadowing of your personnel by union workers.
- Is there a local church with a hotel nearby where I could reduce my venue rental line item?
- Will my attendees feel safe in this city or venue? Are there health risks to be avoided?
- Does the venue meet the needs for handicapped attendees?

Hopefully you will have a site selection committee to help in the final decision for the selection of the city and venue for your event—all of whom are aware of your goals and objectives, AND your budget!

Convention and Visitors Bureaus are your friends! They offer a plethora of complimentary services to event planners that their city hosts from the organization of site visits, assistance with city information to share with attendees, permits, vendors, and, depending on the size of your event, an Event Manager to work with you from start to finish of your event. Some cities have a RELIGIOUS MARKET representative who works strictly with religious events—always ask that question when contacting the CVB. You can Google the CVB for cities of interest for their contact information. Most CVB websites allow you to enter your RFP information directly into their site—which brings us to our next topic.

RFP's

RFP's or Request for Proposal is the document that you will want to create to share information about your event with the vendors that you hope to work with. Again, there are many RFP templates available at event planning websites. They can be very detailed or may include just the basics of the event. The size and complexity of your event will determine what you should include in your RFP. Here is the RFP that I use for most events. (Show sample RFP on screen.)

Suppliers

Suppliers are also your friends! Whether it is a hotel, a restaurant, a transportation company, an audiovisual provider, a security company, or a decorator—THEY WILL IMPACT YOUR EVENT. There are exclusives in many hotels and convention or conference centers for AV, Food and beverage, and SOMETIMES security in which case you have no say in who provides the service. When you can you will want to obtain quotes from more than one supplier. This is the time for NEGOTIATION! Ask for what you want and need for your event BEFORE you actually sign a contract. If you ask before contracting you are negotiating. If you ask AFTER contracting you are begging!

Third Party Planners

Because Event Planning is my full-time job the General Conference, does not rely on Third Party Planners. Companies like Experient or IMN Solutions offer event planning services that are invaluable for the inexperienced event planner or someone who suddenly finds event planning added to their job description. They can assist with as much or as little of the event planning as you so desire—for a fee, of course!

Contracts

Contracts and liability is a critical aspect of event planning. In addition to negotiating for what you want to be included in your contract such as room upgrades for your VIP guests, complimentary meeting space, a force majeure clause that covers both the hotel and the organization, low percentage or NO attrition, or 1 complimentary room per 40 room nights, you will want to be sure that the contract has been **reviewed by legal counsel prior to signing**. Your legal counsel will inform you of contract clauses that are of concern which you will request be amended prior to signing. It is also CRITICAL that an officer of your organization sign the contract. I do not sign ANY contracts in my work. This is a protection for me. If a problem occurs with the contract there may be a claim against the organization but not against me personally. The Signatory should not be a department head even if they are hosting and planning the event. It must be an Officer. This goes for hotel, convention or conference center, transportation, AV, Decorator, or any other type of contracts related to event planning.

Security/Crisis Management

Security and Crisis Management for your event is crucial. More or less security is required based on the size of the event, the location of your event, the hours of your event, and, of course, the type of event. You may or may not need to provide Executive Protection for VIP's. If you are contracting security, you will want to obtain more than one quote unless there is an exclusive provider for the venue you have selected. It will be important for you to have serious discussions with your security provider and give them as much information about your event as possible before your event opens—including people or groups who may not be happy you are meeting. They will assist you in determining the different levels of security you may require whether it be bag checkers, uniformed or undercover officers, or police officers. Plan for a good percentage of your budget to be spent on security.

You also need to create a Crisis Management plan for your event. I usually consult with the venue and/or hotel management and request a copy of their Crisis Management plan to aid in the development of the plan we create. You will want to designate someone to manage this aspect of your event as you will be busy caring for many details during the event. You should be a part of Crisis Management but not the lead person. It is important for you to have Emergency Contact information for every guest or attendee in case you need to reach a family member urgently.

Audiovisual

The Audiovisual line item in your budget will likely represent about a third of the event budget if you plan to livestream or video the presentations. The selection of a production company to manage this function should be handled early in the planning stage. If you plan to do livestreaming, you will need ceiling heights of at least 14 feet in your meeting rooms—important to note during venue selection.

The rental of AV equipment such as LCD projectors can be VERY costly. I recommend that you negotiate into your contract that you are allowed to bring these projectors in as they typically charge you \$400-500 PER DAY to rent them. Screens, projection tables, microphones, and mixer boards are fine to rent as needed. Be sure that you understand whether the venue has an exclusive AV provider before you sign a contract. Also, try to negotiate in an AV discount BEFORE signing the contract.

Exhibits

Exhibits can be a great revenue producer for your event and at the same time a BIG responsibility! An exhibit may consist of tabletop displays that are either manned or unmanned to a large exhibit hall full of varying types of exhibit booths. If the second scenario is the case for your event you will definitely require an Exhibit Manager and Exhibit committee to oversee the approval of applicants, collection of exhibit fees, lay out of booths in conjunction with Event Decorator, communication with exhibitors, move-in and move-out, and management of the exhibit hall during the event.

Here are some of the pros and cons of exhibits at your event:

- Security of exhibits is a major concern and will add to your budget. A lot of theft typically occurs in exhibit halls.
- The approval of exhibitor applicants is critical. Criteria should be established for who may exhibit—are they known to you? Are they in the SDA Yearbook? Are they an ASI member? Do they represent The Church favorably?
- People enjoy visiting an exhibit hall where they have a chance to touch, feel, see, and hear products, books, tools to enhance their work and lives.
- Exhibit halls provide great space for networking.
- Exhibit halls provide great sponsorship options.

You may not want to go to the trouble of a large exhibit hall but some conferences that I have worked with have benefited from having one of our presses like Pacific or Stanborough Press bring in a small bookstore display. This is especially appreciated in locations where there is no local Adventist Book Store. We restrict the hours the book store can be open to during meal hours and before and after the meeting times so that their being on site does not interfere with meeting attendance. It is best to place displays such as this in a secure room or location to avoid theft.

Short Term Travel Insurance

Short term travel insurance has been required for all General Conference events for the past eight years. Some of the benefits to the insured include Emergency Medical Benefits, Emergency Medical Evacuation Benefit, and Repatriation of Remains Benefit, Personal Property Benefit, Trip cancellation and Interruption Benefit, Accidental Death & Dismemberment Benefit—the full listing of benefits may be seen at the Adventist Risk Management web site.

Short term travel insurance should be purchased for your attendees with coverage in place for the approved travel days plus the days of the conference. The ARM website can help you calculate the STT insurance cost for attendees so that this expense may become a part of your budget from the start or included in a registration fee. In the eight years since we began this coverage for GC event attendees it has aided numerous people in receiving medical treatment for simple illnesses to major surgeries. I am sure a number of claims have also been submitted for the loss of personal effects as well. The coverage is not an option.

Timeline

Development of a timeline for your event as well as one for each sub-committee will be a huge asset in keeping the planning team or committee on track. To create a timeline you should begin with the start date of your event and work backwards. How soon must items be shipped? When should ID badges be printed? When are speakers selected? When does our web site and registration open?

Event Evaluation

It may be necessary for your planning team to meet daily during the event for either a steering committee or evening debriefing—or both. This is necessary to be able to correct problems along the way. You will also want to call a debrief at the end of the event to determine what went wrong and what went right for future events. It is sometimes difficult to pull the group together afterwards but try your best to include this important step.

“Perfection is not attainable, but if we chase perfection we can catch excellence.”
-Vince Lombardi

Prayer

One last aspect that I want to discuss before we have Q&A is prayer. We are so blessed that in every committee that we attend we can begin and end with prayer. This should be true with our event planning committees as well. I make it a habit to pray over my events and ask the Lord to prevent ANYTHING of importance from slipping through the cracks. You do not know the times I have received an email or someone has stopped me in the hallway with a question about something that I need to remember to work on. Make this a habit for your events as well.

Let's open the floor now for some Q&A.

Thank you for attending this seminar. I trust the information shared will be useful in your event planning. Remember the words of Benjamin Franklin “**By failing to prepare, you are preparing to fail.**”