

Meeting Planning 101

What is the purpose of the meeting? This should be established before you do anything else!

- To provide education?
- To conduct association business?
- To provide networking opportunities?
- To make money?

Meeting History – Make sure you keep records and pass along to the next meeting chairperson

- Past Attendance (attendees, guests, sponsors and exhibitors)
- Past F&B (Food and Beverage)
- Past Guestroom Usage
 - Original Block and Actual Usage (number of rooms reserved and number used)
 - Breakdown of single/double occupancy
 - Arrival and departure patterns
 - What room rates were paid in the past?

Preparing a Request for Proposal

A Request for Proposal (RFP) can be one page or many pages, depending on the meeting.

Define your Meeting Requirements

- What is the maximum number of participants?
- How many will need accommodations? How many will drive in?
- Where are most of the participants located?
- What are the attendees' interests and expectations?
- What kind of accommodations can participants afford?

Prepare Meeting specifications

- Preferred dates and other dates you will consider.
- Number and types of guestrooms (singles or doubles)
- Number, size and usage of meeting rooms, including times
- Provide a tentative meeting schedule/agenda
- Room sets: theater (just chairs), classroom (w/ 8' tables), banquet (rounds)
- Office/Registration area
- Exhibits (include move-in and move-out)
- Times and types of F&B events
- Audio Visual Requirements (space for projection set-up, internet access)

Additional information you should request in your RFP

- Sleeping Room Rates
- F&B Charges, Taxes, Service Charges
- Access fees for T1 lines or electricity
- Meeting room rental charges
- Daily resort fee
- Energy or other surcharges
- Renovations – recent or planned
- Outlets and other services:
 - Number and type of restaurants
 - Seating capacities; hours of operation
 - Room service hours or operation
 - Health Club
- Restaurants/Entertainment/Activities within walking distance
- **Ask for references from other groups similar to yours.**

Conducting a Site Inspection

After you have reviewed the proposals and narrowed down your options, it's time to visit the properties. Make an appointment with the sales manager of the hotel. (Arrive early to observe service at the facility.)

- Meeting Space
 - Pillars or obstructions?
 - What is the ceiling height?
 - Is there a built-in sound system?
 - Can you use your own vendors or bring in your own A/V equipment without paying a surcharge?
- Sleeping Rooms
 - Are hallways adequately lighted?
 - Are walls soundproofed?
 - Do guest rooms have data ports or wireless internet access? What is the cost?
 - Are there minibars/refrigerators?
 - Are amenities the same in all rooms?
- Outlets and other services
 - Number and types of restaurants, seating capacities, hours of operations
 - Rooms service hours of operation
 - Health club and hours of operation
 - Any other shops or outlets
- Transportation
 - Parking: Self parking and/or valet? How many spaces? What is the charge?
 - Distance from airport; ground transportation options and cost
 - Is there a complimentary shuttle?

Avoiding Problems

- What other groups will be in-house?
- Experience of security staff
- How many staff are trained to perform CPR or use AEDs? How many per shift?
- Evacuation and Shelter-In-Place plans – what actions are taken when an alarm sounds? What is the evacuation plan for guests with disabilities?
- Are workers organized for collective bargaining? When do contracts expire?
- Is there a local ballot initiative to raise hotel or guestroom taxes?

Negotiations

- Demonstrate the value of your meeting – Just because the meeting is important to you doesn't mean it's a valuable piece of business to the hotel.
- Know the market
 - High Season – occupancy runs about 90%; the hotel has little need to be flexible
Or make concessions
 - Shoulder Season – occupancy runs 70-90%
 - Low Season – occupancy runs at less than 70% - your best chance to “make a deal.”
- Know the hotel
 - Is their business primarily sleeping room only or do they have convention space?
 - Is this a resort property? Do they usually have vacationers or business travelers?
- What can you negotiate?
 - Rate
 - Complimentary Rooms/Amenities (fruitbasket, wine, etc.)
 - F&B or A/V discounts
 - Cut-off date for room reservations

Be sure that *you* understand the difference between what you *need* vs. what you *want*

- Are meeting dates flexible?
- Is the meeting room set-up flexible? Do you have to have classroom set up, or will theater seating work?)
- Can you change your pattern? (Can you meet on Wed/Thurs instead of Thurs/Fri?)

Contracts

- Dates sleeping rooms are available and at what rates
- Dates and times meeting space is being held for the group
- Complimentary rooms/upgrades
- Attrition
- Cancellation
- Termination
- Reservation cut-off dates
- Labor charges

Make sure that the contract language is clear and unambiguous!

Make sure that you understand the consequences for attrition (using fewer guest rooms or spending less on food & beverage than you've contracted to do.)

Make sure the contract allows your performance to fall up to a specific amount, usually ten percent. This is called "slippage" and means that the number of guest rooms the group uses can fall by 10% without attrition being owed.

Termination

- Termination: Both parties are excused from performance without liability
- The Force Majeure clause:
An unanticipated circumstance that makes performance of the contract impossible.

Force majeure (French for "greater force") is a common clause in contracts which essentially frees one or both parties from liability or obligation when an extraordinary event beyond the control of the parties, such as war, strike, riot, crime, act of God (flood, earthquake, volcano), prevents one or both parties from fulfilling their obligations under the contract.

What is NOT covered by Force Majeure

- Changes in the economy
- Lower than expected attendance
- Your speaker cancels
- Hotel workers go on strike
- Fear of travel or a threat of danger.

Remember that you accept the obligations of the contract when you sign it! It doesn't matter how your situation might change between the time you sign and the date of the meeting.

Budgeting

- Do not overestimate your attendance. For example, do not assume that a “famous” speaker will draw more attendees.
- Do not overestimate your sponsorship revenue
- When budgeting, make sure you consider food & beverage tax and service charges. This will add at least 25% to your total costs.
- If hosting an off-site event, consider extraordinary costs, such as transportation.

Saving Money on F&B

- Know your F&B minimum. The minimum does not include any taxes, gratuities or service charges.
- Can special menus within a specific budget be created?
- What is the over-set policy?
- Compare menu prices vs. *a la carte*
 - Order “on consumption.” This means, for example, that you order coffee by the gallon and pastries by the dozen, rather than paying a per-person continental breakfast charge. For a large group, “on consumption” is often less expensive.
- Can you serve the lunch dessert later (for an afternoon or exhibit hall break)?
- Use butler service for hors d’oeuvres. If hors d’oeuvres are passed, you can control consumption better than if you have a buffet.

Avoiding Problems

- Review your Banquet Event Orders
- Monitor your room block
- Request emergency contact information and dietary *restrictions* from attendees
- Have contingency plans

Risk Management

There are many types of risks, but all have the same forms of management: avoid the risk, minimize the risk, or transfer the risk. For example, how do you protect yourself and your chapter from liability if one of your attendees drinks too much and is involved in an accident?

- Avoid the risk – don't serve alcohol
- Minimize the risk – have a cash bar
- Transfer the risk – have an alcoholic liability clause **in your contract**

Alcoholic Beverages

If alcoholic beverages are to be served at an official Association function on the hotel premises (or elsewhere under the hotel's alcoholic beverage license), beverages will be dispensed only by the hotel's employees and bartenders. The hotel's employees and bartenders must (a) request proper identification of any person of questionable age and refuse alcoholic beverage service if the person is either under age or proper identification cannot be produced, and (b) refuse alcoholic beverage service to any person who is obviously or visibly intoxicated. The Hotel represents and warrants that all Hotel personnel who dispense or serve alcohol have undergone adequate training to prevent any incidents that could result in claims of liquor liability.

Notwithstanding any other provision, the Hotel shall defend, indemnify and hold harmless NAHU, its directors, officers, employees and agents, and each of them, from and against any and all losses, damages, claims, expenses, and liabilities of any kind, including costs of defense thereof, caused by or arising from the Hotel's sale or service of alcoholic beverages.

The Hotel agrees to carry a minimum of One Million Dollars (\$1,000,000) in liquor liability insurance and further agrees that all of its employers and agents performing services under this Agreement shall at all times comply with all federal, state and local laws pertaining to the sale, service or furnishing of alcoholic beverages.