

NATIONAL ASSOCIATION OF BAR EXECUTIVES

Annual Meeting

San Francisco

Meeting Planning for Non-Meeting Planners

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- **MEETING/EVENT MANAGEMENT** is something like controlling an octopus. A meeting or convention has many tentacles that are very difficult to keep under firm control. The meeting manager must build a system of control devices so that even when the meeting is in full swing, answers are at your fingertips. The Bible for meeting planners is a document that lists each event, name of room, complete details on room set-up required, number of participants, menu if one is involved, audio visual needs, etc. The more concise and systematized, the more valuable the tool. Get it in writing. Make sure you have a written document outlining performance requirements as well as specific logistical details of the meeting/event. This information may be contained in one or more documents. If the meeting/event is fairly simple, a Banquet Event Order (BEO) may suffice. If the meeting/event is more complicated in nature, you should have a contract outlining the performance requirements, followed by BEO's to address room set-ups and food/beverage issues. Make sure the hotel has properly translated your instructions into their communication method.

Materials Provided:

- Prior Planning Prevents Problems
 - Meeting Planning Timetable
 - Meeting To Do List
 - 1998 Annual Convention To Do List
 - NHBA Annual Meeting Hotel BEO's
- **LOCATION OF CONFERENCE.** When deciding on the location of the conference or meeting, look at it from the attendees' perspective. Keep in mind the travel time, cost and availability of parking, seasonal weather conditions, etc.
 - **CONDUCT A SITE VISIT.** If at all possible, look at the site before booking the meeting/event. You don't want to wait until the event to find out the facility isn't what you had expected. Properties are known to stretch the truth about how great the facility is, so be careful. If the meeting/event is a considerable time in the future, make sure to have a "property standards" clause in your contract so you have remedy if the property becomes rundown prior to your event. You also want to make sure the facility is in compliance with the Americans with Disabilities Act. Don't do a site visit or tour unless there is a real possibility you will use the site.

Materials Provided:

- Site Inspection Checklists for
 - Hotel Lobby Areas
 - Guest Rooms
 - Banquet Room, Food & Beverage
 - Meeting Rooms
 - Exhibits
 - Housing & Reservations
 - A/V Equipment
 - On-Site
- Colorado Bar Association Site Selection Checklist
- Americans with Disabilities Act Checklist

- **BE FLEXIBLE IN SCHEDULING YOUR EVENT.** You might get a better deal if you can schedule your event at a time when the property is “off season”, or not as busy and needs your business. Of course, this isn’t always possible because we have “traditions” or specific needs that must be met. But, if you can change the day of the week or the time of year when your program can be held, most likely the property will be more willing to work with you on space availability and prices.
- **ALMOST EVERYTHING IS NEGOTIABLE.** Don’t assume you have to accept the property’s offer on face value. You won’t get a better deal if you don’t ask for it, so **ASK.** Negotiate sleeping room rates, the number of comp rooms, meeting room rates, banquet prices, amenities, etc. AV charges can be a huge hit on your budget, so try to negotiate these rates as well. More than likely the property is in the business to make money, so keep in mind that if you negotiate a great deal on one thing, you may end up paying more for something else. Know what your priorities are and where you need price considerations versus where you can afford to pay more.

Materials provided:

- Colorado Bar Association Contract
 - New Hampshire Bar Association Contract
- **THE CONVENTION SERVICES MANAGER (CSM)** is your primary contact once you’ve confirmed your convention. You want a CSM who carries a lot of clout, reports directly to top management and can get other departments to do things. If your CSM is a novice or has no real authority or muscle to get things done, you’re in trouble. Communications is your key to a successful working relationship with the CSM. Communicate early, often and in writing. The more the CSM knows about your group and your meeting history, the better service you’ll receive. A good CSM will offer creative suggestions for set-ups, meals, entertainment, etc. In a crisis situation, the CSM will often have a creative solution you have not thought about. Make sure the CSM has your meeting covered 24 hours a day, either personally or through staff.
- **A THEME** should be an asset, but can be a useless appendage. The theme should be established after the over-all event program objectives are set. It is to capsulize or sloganize the “tone” of the event, not to determine it. It ties things together and aids in identification and recall. Catchy phrases accomplish little unless attendees see the relevance repeated consistently throughout the event. A good theme lends itself to an eye-catching and mind-catching design. No theme is a much better one than a trite theme.

- **SEEK OUTSIDE SOURCES OF REVENUE.** No matter what size event you have, the potential exists to obtain revenue from sources other than registration fees or ticket prices. Companies providing services to the legal profession are always looking for opportunities to get their name in front of your members. Explore options such as offering event sponsorships, having an exhibit hall, selling ad space in your event program, or soliciting in-kind contributions that will reduce your bottom line expenses. In return for these contributions, determine what you have of value for the company, including use of your mailing list, recognition by the president at the event, tickets for their representatives to attend the event, or signage at the event.

Materials Provided:

- New Hampshire Bar Association Exhibit/Sponsor Solicitation

- **CUT FOOD & BEVERAGE COSTS.** Food and beverage costs can be budget breakers if you're not careful. When offering continental breakfasts or coffee breaks, cut back on how long they'll be open. Afterwards, consolidate the food for later use, such as putting it in a hospitality suite. Negotiate to have opened bottles of liquor transferred to another reception or a hospitality suite. Pay on consumption rather than per person for coffee breaks. During receptions, have food stations attended by a waiter to discourage overindulgence. Use drink tickers (limit two per person) if you have a hosted bar. Hold the hard liquor; it's becoming more accepted to offer only beer, wine and soft drinks at receptions. Rather than cocktails and dinner, hold a reception with "heavy hors d'oeuvres." Be aware that buffets will cost more per person and most venues will do a head or plate count. Buffets will allow for more food variety. Make sure that banquet prices quoted to you are inclusive, meaning they include tax, gratuity and other service charges. Don't over-guarantee meal functions by taking into account that the property will set for 5% over your guarantee.
- **MEETING ROOM** design is an important aspect of meeting planning that affects all attendees. You want to consider the comfort of participants, audiovisual feasibility, speaker focus, traffic flow, accessibility of rest rooms and whether or not any food or beverage service is involved. Traffic patterns and possible conflicts are important when there are concurrent sessions. Ask the hotel for diagrams of each meeting room. Diagram your room set-up and give the hotel a copy. Establish early in the game the cost of your meeting space. The more catering and sleeping rooms you use, the more negotiating power you have. Establish a cut-off date when you will release any blocked space which you will not need. Don't forget to block rooms for your pre and post convention meetings, office space, press rooms, etc. Send the hotel a copy of your attendee list to cross reference with reservations in your block. Keep checking with your hotel or convention center for any changes in its facility, equipment or service capabilities. Surprises on-site are never welcome. Meeting room monitors are essential. Assign a staff person to check the room after set-up to verify the condition of the room, placement and condition of equipment, sign identification, availability of handouts, proper temperature and lighting, etc. At the end of the day or break do a count on the food and beverages which are billed by consumption. It's always good to have meeting room monitors available throughout the event to handle emergencies.

Materials Provided:

- Meeting Room Size – Approximate Capacity Guidelines
- **SPEAKERS** can make or break your meeting. Know your meeting objectives and what your audience wants. Call a colleague for advice on a speaker that can deliver what you want. Great speakers can bomb with your group if you don't work with them to tailor their speech for your audience. Tell speakers exactly what you want and expect from them. Inform speakers about the audience; size, age, gender, positions, interests, etc. Don't forget to give the basics: date of speech; starting and ending times; your reimbursement policy; how to get to the event, etc. Creating a speaker packet is helpful and can include all of the necessary information. The more information you give speakers the better chance that it will be a positive experience for both of you. Give speakers soft deadlines, never absolute ones. Show the speaker the room before their presentation to make sure it is set to their satisfaction. Give speakers feedback on their presentation.

Materials provided:

- Biographical Information Forms
 - Speaker Release Form
 - Conference and Seminar Moderator Guidelines
 - Committee/Section Chair Guidelines for Conferences and Seminars
 - Tips for Presenters
 - Moderator Notes & Faculty Notes
 - State Bar of Wisconsin Convention Speaker's Survival Guide
 - State Bar of Wisconsin Convention Program Chair Survival Guide
- **ADVERTISING** is key to a successful seminar/meeting. Make sure you have a timeline that leaves ample advertising. After all your hand-work in organizing the event and speakers you want to have a good attendance. Remember, people need time to plan their calendars.
- **PRINTED MATERIALS** can quickly break your budget, with paper costs today ranging from exorbitant to astronomical. Give lots of thought to your printing, program and promotion needs. A well thought out plan will save you a lot of dollars and budget headaches. Enlist the aid of someone who regularly deals with printers, i.e. your publication editor. Set up a strict printing timetable – slippage here means big trouble down the road. Make sure yours and the printer's schedule match. If your printer is jammed up with other commitments when your deadlines occur, your schedule means nothing. Discuss paper stock requirements with your printer. It's possible the printer will have roll ends of stock in inventory that will suite your needs – at a substantial savings over an order for fresh stock. For further savings consider tailoring the finished size of your promotion pieces to the stock the printer has available. The final size of all your printed materials is important. Consider ease of handling and standard envelope sizes. Unusual size and shape pieces that stand out from other promotional materials have to be weighed against the cost of special envelopes and paper costs. A good printer is your consultant and can help you tailor an effective well-budgeted printing program.

- **AUDIOVISUALS** are part of most programs.... Send your speakers a detailed form to learn their specific AV needs. Badger speakers to give you this information well in advance. Obtaining last minute AV equipment is time consuming and costly. AV budgets can easily skyrocket so get bids if possible. In-house AV companies can be 25% - 50% higher than other area companies. Get other bids. Check on charges for patching into the house sound system and storage fee charges. Some speakers get enamored by the technology – make sure their AV requests are really needed to accomplish their goal. Spend the money to have back-up equipment on-site. For large group sessions, spend the necessary money to have excellent AV equipment and set-up. An excellent presenter is only a fair speaker if only some can see or hear the person.

Materials Provided:

- Audio Visual Equipment Request Form
 - State Bar of Wisconsin Audio Visual Request Form
- **CONSIDER OUT-SOURCING VARIOUS ASPECTS OF THE EVENT.** Hiring an independent contractor to handle different parts of your meeting/event may be to your advantage. If you have time constraints or a lack of expertise, for instance, it may prove more economical in the long run to hire a specialist. For example, soliciting sponsorships and corporate donations or managing an exhibit hall are services that are very time consuming but can be contracted out on a commission basis so your budget isn't greatly affected. Special events, receptions, and parties can be a tremendous drain on staff and resources. Special event companies are experts on themed parties and can often do them more reasonably than doing it in-house.
 - **PRE & POST CONFERENCE MEETINGS.** No matter how big or small the event, always conduct a “pre-con” with the key property staff. This is not the time to *make* arrangements – it is a time to *confirm* that everyone is on the same page about what's going to take place. Areas to be addressed during the pre-con include: status of your sleeping room block, meeting room arrangements, food & beverage details, AV requirements, billing procedures, and methods of communication during the event. If it is a larger event, also conduct a pre-con with any staff who will be at the event. After the event is over, hold a post-con with the property staff to discuss how things went both perspectives. Do the same with your staff.
 - **REGISTRATION** sets the tone for your meeting or event – so put your best foot forward. Your registration process is the first hospitality function, your primary control center and attendee information center. Since the registration desk is the point of “first impression,” make sure that the signs are easy to read, that the traffic flow is satisfactory, that the registration procedure is uncomplicated and efficient. Your brightest, friendliest, most outgoing staff belong at the registration desk. Do everything you can to encourage advance registration because it speeds the on-site registration process; enables you to plan more accurately for the number of attendees, and starts registration fees working early for your Bar Association. Stress the convenience of check-in with advance registration. Make your refund policy user-friendly and clearly state your refund policy on the registration form.
 - **BRING EXTRAS OF EVERYTHING.** You will always have one or two people who didn't bring their materials or didn't register in advance and want to do so on-site. Be prepared for this by making sure you have extras of everything, including:

- Materials that were mailed out
- Blank registration forms
- Blank name badges and a method to address them (pens, labeling machine, laptop and printer, etc.)
- Materials being handed out at the event
- Meal function tickets
- The registration list(s) (people will sometimes want to look at it to see who else is going to be there)
- The completed registration forms/responses (to verify what they've signed up for)
- Pens and writing pads (at least one person will have forgotten to bring a writing utensil. Sometimes the property will provide complimentary pens and pads, but you can't always count on that)

Also plan to bring a “mini-office” with stapler, tape, paper clips, post-it notes, rubber bands, scissors, receipt book, etc.

- **BEING NICE IS REWARDED WITH NICE BACK.** The easier you are to work with, the more responsive the property staff will be to your needs. There's no reason to be a jerk – in fact, that behavior will usually backfire on you. Staff whom you have developed a good rapport with will be much more willing to help you in an emergency (and you will have emergencies). Be reasonable in your requests to the staff. Don't expect them to jump through hoops that could have been avoided or are unnecessary. Budget in monies to tipping the staff for exceptional service and additional assistance.
- **BE CREATIVE.** There are always new ways to do what you've been doing. Just because you've “always done it that way” doesn't mean you can't spice up the meeting / event. A continental breakfast doesn't have to mean coffee, tea, decaf, juice and danish; you can offer hot chocolate, fruit breads, bagels with flavored cream cheese, or granola bars. Or, hold your event at the local history museum rather than in a hotel ballroom. Consider whether the information you need to convey can be done in a different way. People generally appreciate new ideas and a break from tradition, so don't be afraid to try something creative.
- **REVIEW THE MASTER BILL VERY CAREFULLY.** Mistakes do happen so never assume your bill is accurate. First, make sure to tell the property who is authorized to charge to the master and that you won't pay for unauthorized charges. If, when booking the event, you made a deposit, make sure it is posted to the master and that you have been credited with the appropriate discounts such as comp rooms. Confirm you are being charged correctly for AV equipment and that your banquet charges are either for the number of people served or the guarantee, whichever is higher. Also, make sure you aren't being billed for charges incurred by ancillary groups.
- **EVALUATIONS** are a means to success. It's important to determine how well your meeting goals were met and objectives accomplished. It's equally important to help you determine if the dollars invested were well spent and where to increase or cut back next time. Keep the form short. It should take no more than 5 minutes to complete. You can request that forms be signed or not. Unsigned evaluations will give you honest, but sometimes painful (but helpful) information. Focus groups are great for getting

information on specific aspects of your meeting. Do a staff evaluation following your event. Share your members' and staff evaluation with the hotel.

Materials Provided:

- State Bar of Wisconsin 1998 Midwinter Convention Evaluation
 - New Hampshire Bar Association CLE Program Evaluation Forms
- **MAINTAIN HISTORICAL DATA.** One of the most effective negotiating tools is knowing what value your meeting/event brings to a property. If this is an event occurring more than one time, make sure to require that a post-meeting report be provided by the property. This report should include all data concerning your sleeping room block, food & beverage usage including catering and room service; AV usage; patronage of the restaurants, retail outlets and sporting facilities by your attendees; and business gained from ancillary groups in-house because of your event. Maintain a file that tracks this information so when you go to book the event next time, you can show how much money was realized by the property.
- **SWEAT THE SMALL STUFF (WITHIN REASON).** The key to successful meeting and event planning is attention to detail. Check, double check and triple check your arrangements to make sure you've thought of everything. It sometimes is helpful to run through the details with someone else to make sure your bases are covered. However, no matter how many times you check your details, something can, and likely will go wrong. But, unless it is something major, attendees are usually fairly oblivious to snafus that occur, so only you and the property staff will know there is a problem