

# Conference and Events Management Handbook

November 18, 2010



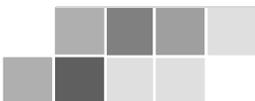
## Project Summary

At times, it is necessary for State of Ohio government agencies to produce meetings, conferences, seminars, special events and/or symposiums. Examples include, but are not limited to, customer training, product and program launches, marketing and public relations, staff development, board meetings and media relations activities. State agencies may experience fluctuations in demand for these services.

## Project Goal

The objective of this project is to develop a Conference and Event Handbook (subsequently known as Handbook) to assist State of Ohio government agencies in the production of conferences, training and special events. Such a tool will increase efficiencies, effectiveness and affordability of State of Ohio government hosted and events.

It is the intention of this project team that this Handbook is created with the sole purpose of marketing it to the Department of Administrative Services (DAS) and promoted throughout State agencies via a subsequent project.



## Project Outcome

- Research and collect project information for developing a Handbook with forms and tools
- Choose Handbook project title and components; identify contents that are consistent with industry standards and best practices
- Design logo and design format for the Handbook
- Create contents and input into Handbook document

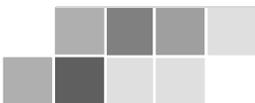
## Project Benefits

Most State of Ohio government workers have limited training and experience in producing these events. In addition, these workers have multiple duties and usually take conferences and events as an “add on” duty. They have limited networking and contacts in the hospitality industry which provides service to conference and event planners. This conference and events handbook will serve as guideline for experienced and non-experienced state employees who engage in the coordination and/or setup of conferences, trainings, or special events.

## Project Team

For more information about this project, contact team members

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# Conference and Event Handbook

For State of Ohio Government Agencies



2010

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# CONFERENCE AND EVENT HANDBOOK

For State of Ohio Government Agencies

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The material and information in this handbook must be evaluated before its use by the state government agency for applicability to the event and alignment with the policies and procedures set forth by its agency, board or commission. The material provided is reflective of event-industry recommendations and best practices, is general in nature and can be modified to suit each event. The material cannot, however, be reproduced for commercial nature and is not officially endorsed by the State of Ohio.

At times throughout this handbook, several terms are used interchangeably when referring to an event: conference, convention, event, meeting, seminar, symposium and training.

# CONFERENCE AND EVENT HANDBOOK

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## Introduction

Conferences provide excellent opportunities for learning, sharing ideas, networking, strategic thinking and planning. If you are the planner, there is one essential task to do before you start planning: **Get help!** You could form a conference committee, hire an expert or use your own resources. Whatever option you choose, this handbook will help in planning your conference.

Planning a successful conference can be challenging and rewarding. While planning a conference, consider major factors such as the right time, the right place, the right people, the right leader and the right program content. Time is of the essence. A conference will necessitate planning well before, sometimes a year in advance. (Craven, 2006)

Below are steps in planning a successful event or conference:

1. Set up a conference planning committee and organize a meeting to decide on the necessary jobs, assign those jobs and set time lines.
2. Determine your event objectives. Decide on dates for regular meetings to plan and produce notes from these meetings along with actionable points.
3. Schedule your work. Produce a conference activity schedule or timeline along with the list of actions, status of actions and deadlines. Produce an agenda for every planning meeting. Take notes during the meetings and continue to refine your needs toward producing the conference, eliminating gaps and address shortfalls in your plan.
4. Prepare the conference budget, program, marketing, public relations plan and event schedule. In the budget, include a revenue and expenditure section along with an actual column to distinguish between budgeted amounts and actual revenues or expenditures. Include conference objectives in the program to make speakers aware of the conference goals. The marketing and PR plan should include a way to reach the target audience through as many online venues as possible. All the activities in the conference must be designated in the event schedule.
5. Confirm your suppliers and products requirements well in advance of your event. Professional conference organizers can help you plan the conference and manage the registration. Make sure the venue is large enough to hold all the activities you plan and confirm the costs that will be incurred to hold the events. In case the conference takes place for more than one day, plan accommodations for the delegates. Check whether the venue provides the necessary audio visual equipment and production or outsource

them and obtain quotes for that equipment. Plan for other requirements such as catering, transport, entertainment, delegate bags, etc. and include them in the budget. Ensure that the budget includes all costs to avoid surprises later on.

6. Ensure all procedures are in place to manage the conference activities. Prepare to process registrations and finances, speakers, sessions, workshops, venue and accommodation requirements, exhibitor and sponsorship guidelines. Update your activity and events schedule frequently. Report back on progress in regular planning meetings and modify your plans to meet your goals.

7. Prepare post-event evaluation reports and lessons learned. Hand out these forms to delegates, sponsors, speakers and exhibitors to return to you after the conference. Organize a meeting to get feedback soon after the conference. Arrange a final meeting to discuss and review the budget, get evaluation results, lessons learned and collect any outstanding payments. Note any necessary improvements and changes for future planning.

Following these steps will aid in your conference planning and will increase your chances of having a successful event. (Cequea, 2010)

# CONFERENCE AND EVENT HANDBOOK

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## Conference Time Lines

Developing a timeline is an important early step in the planning process. A good timeline will identify key tasks and dates and keep your priorities straight. Most importantly, it will factor in the time you need to make sound decisions. (Craven, 2006: 85)

Don't underestimate the value of a timeline. It keeps everyone on track, and most importantly, deadlines are not missed if a timeline is accurate. A good place to look for can't-miss dates is in your vendor contracts. Don't be afraid to spend a full day detailing and perfecting your timeline for an important meeting. With experience, timelines become second nature. (Craven, 2006: 87)

The best action plans include sections that delineate goals and objectives; describe the tasks to be completed before, during and after the event; track budget and expenses; and measure results. (LoCicero, 2008: 26)

Four versions of conference planning timelines are provided to assist the planner in accomplishing tasks in an orderly and logical manner. Choose the timeline that is most appropriate, based upon the planning time available and magnitude of the event.

## Three-Month Conference Time Line

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 3 MONTHS BEFORE EVENT</b>				
3 months		Determine the objective of the meeting and develop the program and budget		
3 months		Book meeting site and support services (Check calendar of local events to avoid conflicting or inappropriate dates)		
3 months		Send letters of agreement to hotel and suppliers		
3 months		Set up master account for your meeting charges with the hotel (authorize who can sign charges)		
3 months		Invite speakers and inform them about your attendees and the facilities of the hotel, including audiovisual capabilities		
3 months		Notify attendees		
3 months		Make travel arrangements		
<b>START 5 WEEKS BEFORE EVENT</b>				
5 weeks		Confirm menus, room setups and supplies in writing with your event manager		
5 weeks		Monitor speakers' presentation development and offer assistance in reproducing any handouts		
5 weeks		Order signs and printed materials		
5 weeks		Mail attendees the agendas, suggested dress and other instructions		
5 weeks		Order gifts and amenities. Arrange deliveries of gifts (and meeting registration materials) with your hotel contact		
<b>START 3 WEEKS BEFORE EVENT</b>				
3 weeks		Check with your speakers regarding the progress of their presentations, audiovisual and logistical arrangements		
3 weeks		Submit rooming list to hotel and confirm arrangements for amenities		

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 1 WEEK BEFORE EVENT</b>				
1 week		Ship materials to arrive 24 hours before your arrival, and confirm arrival before leaving your office		
1 week		Confirm all audiovisual requirements and produce slides		
1 week		Make arrangements for shipping materials back to your office after the meeting		
1 week		Confirm (72 hours in advance) your meal and beverage counts for the first day food functions		
1 week		Take a complete master set of all handouts with you (If your shipment of materials is lost or delayed, you can arrange to have your master set photocopied)		
<b>UPON ARRIVAL - 1 DAY BEFORE OR DAY OF MEETING</b>				
1 day		Review details and walk through your meeting space with your property event manager		
1 day		Personally inspect shipped materials to be sure that all of your items have arrived and that they are in good condition		
1 day		Check the hotel function board and front desk for posted times and locations of your functions		
1 day		Check function space one hour in advance		
1 day		Notify your event manager immediately of any changes in your plans or requirements		
1 day		Sign banquet checks each day and keep an ongoing record of your on-site expenses		
<b>CONCLUDING A SUCCESSFUL MEETING</b>				
Post event		Meet with your event manager to review your sessions, charges and receipts		
Post event		Share with your event manager the names of personnel who have provided extraordinary service		

## Six-Month Conference Time Line

Meeting Date		Task	Person In Charge	Completed
<b>START 6-3 MONTHS BEFORE EVENT</b>				
6 months		Establish Budget & estimate the number of attendees you can accommodate		
6 months		Identify your committee. Select a committee chair, delegate and make your committee assignments		
6 months		Establish committee meeting schedule for the next 5 months		
6 months		Discuss communication between committee members and develop a list with all contact information		
6 months		Contact Exhibitors: establish who will be responsible for the coordination and set-up for exhibits		
6 months		Identify your key-note speakers, and initiate confirmation of their participation		
6 months		Contracts:		
6 months		<ul style="list-style-type: none"> <li>Hotel: Initiate &amp; prepare the contract</li> </ul>		
6 months		<ul style="list-style-type: none"> <li>Key Note Speakers: Agree in sponsorship and each sponsor prepare the appropriate contracts</li> </ul>		
6 months		Obtain Director's approval for food/beverage		
6 months		Develop agenda, printed PR materials, and announcements re: the registration		
6 months		Prepare SAVE THE DATE CARD		
6 months		Assign and prepare conference evaluation		
6 months		Order any giveaways		
6 months		Finalize agenda & registration brochure; Prepare to launch on-line registration (9 weeks prior to week of conference).		

Meeting Date		Task	Person In Charge	Completed
<b>START 3-1 MONTHS BEFORE EVENT</b>				
2 months		Email confirmation to presenters/speakers; obtain their handouts if to be printed in house		
2 months		Sending confirmation LR to them with all the logistics and final agenda		
2 months		Email confirmation to exhibitors (sending confirmation LR to them with all the logistics and final agenda)		
2 months		Develop and/or make arrangements for signage		
2 months		Complete application for CEUs (must have complete agenda, presenter resumes and evaluation		
<b>START 3 WEEKS BEFORE EVENT</b>				
3 weeks		Review & confirm contract for AV and space requirements and arrangements for accuracy		
3 weeks		Assign workshops to hotel conference rooms		
3 weeks		Select & assign moderator responsibilities		
3 weeks		Confirm any decorations/special awards/props		
<b>START 1 WEEK BEFORE EVENT</b>				
1 week		Confirm catering order		
1 week		Conduct on-site check; confirm registration tables, location, parking, catering set-up etc		
1 week		Provide an up-to-date agenda to the hotel contact, all committee members		
1 week		Confirm on-site staff/volunteers for each day/shift		
1 week		EP on-line registration deadline – review registration lists, reports, name tags etc		
1 week		Print WS handouts.		
1 week		Prepare handouts/folders		
1 week		Finalize Script		

Meeting Date		Task	Person In Charge	Completed
<b>START 1 DAY BEFORE OR DAY OF EVENT</b>				
1 day		Prepare walk-in registration materials		
1 day		Pack registration materials		
1 day		Complete set-up at location (Set-up the day before if no extra cost & hotel is open)		

## Twelve-Month Conference Time Line

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 12-6 MONTHS BEFORE EVENT</b>				
12 months		Strategic planning		
12 months		Discovery, analysis and planning		
12 months		Identify In House capabilities		
12 months		Engage stakeholders		
12 months		Risk Management		
12 months		Identify your committee. Select a committee chair, delegate and make your committee assignments		
12 months		Establish committee meeting schedule		
12 months		Discuss communication between committee members and develop a list with all contact information		
12 months		Goals and objectives		
12 months		Written goals and objectives		
12 months		Identify audience		
12 months		Measurable outcomes		
12 months		Curriculum/program content		
12 months		Develop agenda		
12 months		Define content		
12 months		Identify format		
12 months		Educational program committees		
12 months		Selecting speakers		
12 months		Budgeting and accounting		
12 months		Establish Budget & estimate the number of attendees you can accommodate		
12 months		Building the budget		

Meeting Date	Start Date	Task	Person In Charge	Completed
12 months		Break-even analysis		
12 months		Excel spreadsheet of line items		
12 months		Master accounts		
12 months		Billing timetable		
12 months		Venue selection		
12 months		Facility features		
12 months		Site inspection		
12 months		Contracts:		
12 months		Hotel: Initiate & prepare the contract		
12 months		Accessibility		
12 months		Determine accessibility		
12 months		Responsibilities		
12 months		Contact Exhibitors: establish who will be responsible for the coordination and set-up for exhibits. Identify exhibitors		
12 months		Identify your key-note speakers, and initiate confirmation of their participation; Key Note Speakers: Agree on sponsorship and each sponsor		
12 months		Obtain Director's approval for food/beverage		
<b>START 6-3 MONTHS BEFORE EVENT</b>				
6 months		Communications with event facilities		
6 months		Planning timeline		
6 months		Function set-up orders		
6 months		Banquet event orders		
6 months		Facility resume		
6 months		Pre- and Post-event meetings		
6 months		Develop printed PR materials, and announcements re: the registration		

Meeting Date	Start Date	Task	Person In Charge	Completed
6 months		Prepare SAVE THE DATE CARD		
6 months		Assign and prepare conference evaluation		
6 months		Order any giveaways		
6 months		Finalize agenda & registration brochure; Prepare to launch on-line registration		
6 months		Email confirmation to presenters/speakers; obtain their handouts if to be printed in house		
6 months		Develop and/or make arrangements for signage		
6 months		Complete application for CEUs (must have complete agenda, presenter resumes and evaluation)		
<b>START 3-1 MONTHS BEFORE EVENT</b>				
3 months		Email confirmation to presenters/speakers; obtain their handouts if to be printed in house		
3 months		Sending confirmation LR to them with all the logistics and final agenda		
3 months		Email confirmation to exhibitors (sending confirmation LR to them with all the logistics and final agenda)		
3 months		Develop and/or make arrangements for signage		
3 months		Complete application for CEUs (must have complete agenda, presenter resumes and evaluation)		
3 months		Review & confirm contract for AV and space requirements and arrangements for accuracy		
3 months		Assign workshops to hotel conference rooms		

Meeting Date	Start Date	Task	Person In Charge	Completed
3 months		Select & assign moderator responsibilities		
3 months		Confirm any decorations/special awards/props		
3 months		Registration		
3 months		Pre-registration		
3 months		Online and ASP		
3 months		On-site registration		
3 months		Lead retrieval		
3 months		Reservations and housing		
3 months		Reservation process		
3 months		Incentives		
3 months		Housing		
3 months		Blocks and pick-ups		
3 months		Marketing plan		
3 months		Promotion plan		
3 months		Publicity and media relations		
3 months		Audio visual requirements		
3 months		Sound, screens, projectors		
3 months		Recording and playback		
3 months		Lighting		
3 months		Food and beverage		
3 months		Negotiating costs		
3 months		Service types		
3 months		Menu planning		
3 months		Food functions		
<b>START 1 MONTH TO 1 WEEK BEFORE EVENT</b>				
1 month		Confirm catering order		
1 month		Conduct on-site check; confirm registration tables, location, parking, catering set-up etc		

Meeting Date	Start Date	Task	Person In Charge	Completed
1 month		Provide an up-to-date agenda to the hotel contact, all committee members		
1 month		Confirm on-site staff/volunteers for each day/shift		
1 month		EP on-line registration deadline – review registration lists, reports, name tags etc		
1 month		Print presenter handouts		
1 month		Prepare handouts/folders		
1 month		Finalize script		
1 month		Transportation		
1 month		Air		
1 month		Ground		
1 month		Transportation providers		
1 month		Etiquette and protocol		
1 month		Communication and correspondence		
1 month		Seating		
1 month		Flags		
<b>START 1 DAY BEFORE OR DAY OF EVENT</b>				
1 day		Prepare walk-in registration materials		
1 day		Pack registration materials		
1 day		Complete set-up at location (Set-up the day before if no extra cost & hotel is open)		
<b>POST EVENT</b>				
1 day		Review evaluation results		
1 day		Discuss lessons learned		

## Eighteen-Month Conference Time Line

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 18 MONTHS BEFORE EVENT</b>				
18 months		Set objectives, meeting/exhibit dates and locale		
18 months		Set preliminary budget		
18 months		Set registration fees and policy		
18 months		Conduct site visit		
18 months		Check site references from other meeting planners		
18 months		Negotiate fares with official airline		
18 months		Select ground operator		
18 months		Select official car-rental agency		
18 months		Define promotional strategy		
18 months		Assemble potential exhibitor lists		
18 months		Prepare first calendar notices and press releases		
18 months		Contact CVBs, hotels and conference centers		
<b>START 16 MONTHS BEFORE EVENT</b>				
16 months		Establish meeting theme and objectives		
16 months		Negotiate hotel rates and blocks, sign hotel contracts		
16 months		Select freight company		
16 months		Select exhibit service contractor		
16 months		Produce exhibit floor plan		
16 months		Establish exhibit space rates		
16 months		Arrange insurance coverage		
16 months		Contact speaker's bureau to check on availabilities/fees		
<b>START 14 MONTHS BEFORE EVENT</b>				
14 months		Prepare budget/receive approval		

Meeting Date	Start Date	Task	Person In Charge	Completed
14 months		Invite and confirm key speakers		
14 months		Determine preliminary food and beverage requirements		
14 months		Prepare and mail first meeting announcements and promotional materials to prospective attendees		
14 months		Prepare program agenda		
14 months		Mail first exhibitor promotion		
<b>START 12 MONTHS BEFORE EVENT</b>				
12 months		Select and contract with audiovisual supplier		
12 months		Develop logo/graphics theme		
12 months		Get speakers' audiovisual needs		
12 months		Adjust exhibit floor plan		
12 months		Issue new media release		
12 months		Produce and mail new promotion to prospective attendees		
<b>START 6 MONTHS BEFORE EVENT</b>				
6 months		Create checklist for all meeting segments		
6 months		Order and confirm delivery date of materials/giveaways		
6 months		Select photographer, entertainment, and security vendor		
6 months		Arrange for on-site office and communications needs		
6 months		Begin processing registration forms		
6 months		Determine participants: facilitators, dignitaries etc.		
6 months		Solicit sponsors and confirm in writing		
6 months		Book your headliner entertainment		
6 months		Develop meeting requirements and times for meal functions, receptions, special activities, exhibits and tours		
6 months		Mail next promotion piece to prospective attendees		

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 4 MONTHS BEFORE EVENT</b>				
4 months		Issue new media release		
4 months		Refine program and agenda		
4 months		Select photographer, entertainment, and security vendors		
4 months		Determine materials shipping arrangements		
4 months		Order and confirm delivery date of giveaways		
4 months		Assign speaker locations/times		
4 months		Confirm audiovisual requirements		
4 months		Plan meeting sessions that include topics and rooms		
4 months		Determine transportation needs of participants		
4 months		Determine meal selection and pricing		
4 months		Finalize the specific meeting rooms and layouts required		
4 months		Have all decisions finalized in contractual form		
<b>START 3 MONTHS BEFORE EVENT</b>				
3 months		Determine what materials need to be reproduced		
3 months		Obtain permission for any material you intend to copy		
3 months		Plan and arrange airport arrival needs for meet-and-greet		
3 months		Mail new promotional piece to prospective attendees		
3 months		Send invitation letters to VIPs		
3 months		Determine materials needed in registration packet		
3 months		Determine meeting room setups and notify site		
3 months		Order necessary signs, banners and room signage		

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 2 MONTHS BEFORE EVENT</b>				
2 months		Adjust budget again		
2 months		Open host-city bank account		
2 months		Finalize session schedule and room assignments		
2 months		Produce and mail exhibitor services kits		
2 months		Finalize F&B schedule		
2 months		Determine on-site staff needs		
2 months		Determine security needs		
2 months		Compile exhibitor directory		
2 months		Review processing and billing activity with hotels		
2 months		Plan social events with local clubs and restaurants		
2 months		Confirm agenda with speakers and presenters		
2 months		Confirm presentation needs with site manager		
2 months		Mail speakers and/or presenters their travel and registration information and preliminary agendas		
2 months		Finalize meal selection/confirm site details		
2 months		Reconfirm with all external vendors		
2 months		Send attendees information regarding meeting attire, agenda, hotel and travel arrangements		
2 months		Mail final promotional piece to prospective attendees		
<b>START 1 MONTH BEFORE EVENT</b>				
1 month		Print final program and conference guide		
1 month		Print workbooks		
1 month		Check cut-off date for sleeping room bookings at hotel		
1 month		Request room pick-up list		

Meeting Date	Start Date	Task	Person In Charge	Completed
1 month		Submit daily schedule to hotels		
1 month		Produce badge and ticket stocks		
1 month		Contact all speakers to confirm		
1 month		Submit final room list to the site manager		
1 month		Arrange business center for participants, if appropriate		
1 month		Create tent cards that have daily agendas on the back		
1 month		Create name badges		
1 month		Create meeting handouts in hard copy and electronic		
1 month		Send attendees information about the meeting, participation requirements and facilities		
1 month		Mail final registration information, travel plans and updated agendas		
1 month		Cut-off date for guarantee numbers for special activities		
1 month		Such as golf outings or family tours		
1 month		Organize registration materials		
<b>START 2 WEEKS BEFORE EVENT</b>				
2 weeks		Ship materials to meeting site and confirm delivery		
2 weeks		Prepare name badges for all attendees		
2 weeks		Make pre-event preparations onsite		
2 weeks		Prepare registration list with count of registrants		
2 weeks		Finalize food arrangements		
2 weeks		Mail press release to all local press		
2 weeks		Review any updates or changes with site manager		
2 weeks		Confirm number of attendees with hotel and caterer		

Meeting Date	Start Date	Task	Person In Charge	Completed
<b>START 1 WEEK BEFORE EVENT</b>				
1 week		Check inventory of materials shipped in advance		
1 week		Hold a pre-convention meeting: Review last-minute changes to conference résumé, including guarantees, and remind facility staff of importance of meeting procedures for daily review of charges to master account		
1 week		Meet with facility accounting department to confirm and prepare final accounting and auditing report of all charges		
1 week		Confirm information to be posted on reader boards		
1 week		Meet with security and review procedures		
1 week		Review rooming list with front desk and confirm all pre-registered attendees and procedure for check-in; inspect rooms assigned to VIPs and to attendees requiring rooms meeting ADA standards		
1 week		Check weather reports for arrival delays and review alternate plans; coordinate airport meet-and-greet plans		
1 week		Coordinate specific times for guest room delivery of any meeting materials and/or gifts for VIPs		
1 week		Set up private office space and separate registration area		
1 week		Review any updates or changes with site manager		
1 week		Set up registration tables with attendee materials		
1 week		Re-check accommodations list and meeting room needs		
1 week		Set up signage, banners and tent cards in the meeting rooms		
1 week		Check audiovisual equipment		
<b>1 DAY BEFORE OR DAY OF EVENT</b>				
1 day		Post direction signs and large posters outside rooms		
1 day		Set up a registration table one hour before meeting		

Meeting Date	Start Date	Task	Person In Charge	Completed
1 day		Appoint staff to greet speakers as they arrive		
1 day		Appoint staff to greet press members		
1 day		Appoint clean-up committee		
1 day		Welcome attendees		
1 day		Distribute name badges, final agendas and materials		
1 day		Check audiovisual equipment before presentation begins		
1 day		Distribute giveaways		
1 day		Confirm meal timing		
1 day		Plan separate post-meeting follow-ups with your own staff and facility staff and issue specific gratuities		
<b>POST EVENT</b>				
1 day		Reconcile finances		
1 day		Do a post-budget performance review		
1 day		Ensure all costs have been covered: food, printing, etc		
1 day		Finalize budget report, including actual costs and revenues		
1 day		Complete payment for site, speakers and other services		
1 day		Prepare invoices for sponsors and unpaid attendees		
1 day		Pack and inventory materials		
1 day		Have leftover materials shipped back to office		
1 day		Send thank you notes to speakers and presenters		
1 day		Send thank you notes to facility and to personnel that went above and beyond to ensure success of meeting		
1 day		Send thank you notes to VIP's for their attendance where appropriate		
1 day		Review meeting evaluations		

Meeting Date	Start Date	Task	Person In Charge	Completed
1 day		Document meeting notes, prices, vendors and suggestions for future meetings		
1 day		Print final registration list including onsite registrants		
1 day		Request a sleeping room pick-up summary from hotel		

# CONFERENCE AND EVENT HANDBOOK

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## Phase One: Initiate Event

### Strategic planning

Strategic planning is a long range plan of action developed to advance the mission of the organization. The best action plans include sections that delineate goals and objectives; describe the tasks to be completed before, during and after the event; track budget and expenses; and measure results. The event action plan is your all-in-one passport to your event, and it lets everyone in on how the event is being created, designed and executed. (LoCicero, 2008: 26)

### Goals and Objectives

With goals and objectives clearly stated, effective management can take place. An effectively communicated goal helps planners stay focused. A creatively stated goal may also have an emotional appeal and be used as a theme of the event. (CIC: 24)

### Budget

One of the first things to do after outlining your meeting or event's goals and objectives is to prepare a budget. This is a key step because your budget is an essential tool that guides expenditures, and one to which you will refer frequently. Once prepared and approved, your budget, along with your goals and objectives, is your blueprint for planning your meeting. It will provide you with opportunities as well as restrictions, and allow you to make educated decisions to ensure you don't lose sight of your meeting or event's purpose. (Craven, 2006: 97)

## Checklists to Initiate Event

<u>Page</u>	<u>Checklist Name</u>	<u>Reason For Using This Checklist</u>
30	Strategic Event Planning	Strategic event planning is not about the end product (meetings and events) but rather about engaging in a disciplined practice to ensure the end product maximizes resources, supports organizational strategies and produces a high return on investment (ROI).
31	Goals and Objectives	Determining the purpose of the event and creating clear goals and measurable objectives is the most important step in planning a compelling event (CIC, 21). A conference planner can use this checklist to help set goals and objectives for an event.
32	Budgeting	The conference planner can use this checklist to help identify income and expense items associated with producing a meeting or event.

## CHECKLIST: STRATEGIC MEETINGS MANAGEMENT AND ROI

- Be curious about your organization and its industry
- Scan the environment
- Engage stakeholders
- Gain historical perspective
- Identify objectives
- Develop strategies
- Define metrics
- Design according to objectives
- Measure outcomes
- Communicate value

## CHECKLIST: SETTING GOALS AND OBJECTIVES

### **Information to be collected from potential participants**

- Demographics (age, geographic location, specialty or special interest, etc.)
- Education and industry experience
- Reasons for attending (education, networking, etc.)
- Educational needs (including certification, earning CEUs, gaining new skills, etc.)
- Opinions concerning past events (educational content, format, speakers, networking opportunities, etc.)
- Suggestions for event improvements and new speaker recommendations
- Trade publications read
- Their budget for attending
- Who will pay fees and expenses (individual, employer, organization)

### **Research Methods**

- Focus groups
- Surveys
- Sampling
- Educational committee

### **Write specific objectives**

- Describe what participants will gain from the session(s)
- Describe the session(s), including format, speaker(s), length, resources, technology, etc.
- Describe the measurable outcome, including CEUs, certification, licensing, other

### **Share goals and objectives with:**

- Education committee
- All other committees
- Planning staff
- Facility staff
- Convention services
- Suppliers
- Vendors
- Exhibitors
- Speakers
- Sponsoring organizations
- Potential participants (as part of marketing and publicity)

Excerpt from the Convention Industry Council's Manual, 8th Edition study guide for the Certified Meeting Professional program. Visit [www.conventionindustry.org](http://www.conventionindustry.org) for more information on the CMP program and purchase of full study guide.

## CHECKLIST: BUDGETING

### *Income items*

- Registration fees
- Guest tour fees
- Sporting event fees (golf outings, other)
- Tickets (special events: banquet, dinner, other)
- Exhibit booth sales
- Sponsorships
- Grants
- Advertisement sales
- Program proceedings (cds, etc.)
- Interest earned

### *Expense items*

- Staffing costs (salaries, benefits, travel, housing, meals, phone)
- Overhead, indirect cost (rent, office supplies, equipment)
- Legal fees
- Insurance coverages
- Site selection costs
- Space/facility rental
- Audiovisual services
- Speakers (honoraria, travel, meals, other)
- Food and beverage
- Program committee (volunteer) costs
- Board, other VIP costs (travel, meals, entertainment)
- Temporary on-site staffing
- Gratuities
- Design and production of print material
- Printing, photocopying
- Advertising costs
- Shipping
- Equipment rental (computers, copiers)
- Phone
- Internet
- Bank charges (processing credit cards)
- Postage
- Registration booths
- Production, staging
- Photography
- Press costs (press room, press conference)
- Decoration
- Entertainment
- Signs
- Exhibit expenses
- Awards
- Flowers, plants
- Special events
- Gifts, amenities
- Guest tours
- Sporting events (golf outings, other)
- Transportation
- Miscellaneous

# CONFERENCE AND EVENT HANDBOOK

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## Phase Two: Plan Event

Once you've fine-tuned your event's purpose, assembled your staff, and surveyed the nuts and bolts of making it run, you'll need to give it shape and shading. You'll need to find the place to host it, set the tone, and take care of both the necessities and extras that will make it most effective.

Whether the event is a meeting for ten or a conference for 500, you must take account of several aspects that will make your endeavor successful. The more successful, the more impact it will have on your organization's image and productivity. (LoCicero, 2008:64)

While you may be personally responsible for an event on a small scale—such as a meeting for twelve or a luncheon for six—many events would be impossible to carry out without the help of others. Once you have the responsibilities carved out and clearly delineated in a to-do list, you have to determine who can accomplish tasks, whom you can delegate to, what responsibilities can be outsourced for maximum effectiveness, and which ones should be turned over to a vendor. (LoCicero, 2008:38)

The following checklists will assist a planner in accomplishing the items described above.

## Checklists to Plan Event

<u>Page</u>	<u>Checklist Name</u>	<u>Reason For Using This Checklist</u>
38	Planning Program Content	A conference planner can use this checklist to help select program topics, content and formats which satisfy the event objectives.
39	Continuing Education	Continuing education is often the main objective of meeting and a major component of many other events (CIC, 43). The conference planner can use this checklist to help plan the continuing education components of an event.
40	Site Selection	Where an event takes place can greatly influence how well it reaches its goals and objectives. The conference planner can use this checklist to help identify a location in which to hold the event.
42	Facility Selection	The conference planner can use this checklist to help choose the right facility to physically house the event.
45	Accessibility	The intent of the <i>Americans with Disabilities Act</i> (ADA) is to prevent discrimination against people with disabilities in the United States. It is the conference planner's responsibility to ensure the event facility and program is accessible to all participants. The conference planner can use this checklist to help ensure this occurs.
49	Convention Services	After a conference planner has booked a facility, many convention and visitors bureaus, hotels and conference centers will dedicate a customer services manager (CSM) to serve the planning and on-site needs of a conference. The conference planner can use this checklist to help guide discussions with the CSM.
51	Events Specifications Guide	A major factor in the success or failure of an event is how the instructions for the execution of plans are conveyed by the planner to staff at the host venue (CIC, 321). The conference planner can use this checklist to help identify the type of event information that must be communicated to the host venue.
53	Risk Management	Taking the time and trouble to prepare for an unlikely emergency may seem tedious and perhaps unnecessary, but saving even one life or avoiding one calamity will make the extra efforts worthwhile (CIC, 145). The conference planner can use this checklist to help prepare and manage unlikely emergencies.
55	Exhibits	Exhibitions offer strategic marketing opportunities to the companies that exhibit. In return, they provide financial support to the event organizer or sponsor (CIC, 401). The conference planner can use this checklist to help plan and deliver an exhibition, also known as exposition, expo or tradeshow.
60	Support Services	Production of a conference or event requires support from many different vendors in many different fields (CIC, 197). The conference planner can use this checklist to help determine support services needed for the event.
62	Registration	Event attendees form their first and sometimes lasting impression of an event through registration (CIC, 269). The conference planner can use this checklist to help develop and offer event registration to the participants.
<u>Page</u>	<u>Checklist Name</u>	<u>Reason For Using This Checklist</u>

66	Computer Applications	With a personal computer and appropriate software or an internet connection, it is possible to perform event-related jobs in a short time with much less effort (CIC, 235). The conference planner can use this checklist to discover automated tools which support the event planning process.
69	Event Website	An event web site should be more than just an online registration service. The conference planner can use this checklist to help build an effective event web site.
71	Marketing, Promotion & Publicity	A well thought-out marketing plan and promotional strategy can be critical to an event's success (CIC, 299). The conference planner can use this checklist to help create a marketing plan for an event.
74	Audiovisual Requirements	Presentation technology and computers have become vital elements of most events and one of the largest cost factors in most event budgets (CIC, 341). The conference planner can use this checklist to help determine audio visual needs and work with an audio visual supplier.
77	Food & Beverage	The conference planner can use this checklist to help plan a reception, banquet, luncheon or other event where food and beverage will be served.
81	Reservations & Housing	The conference planner can use this checklist to help manage accommodations when staff and/or attendees require an overnight stay.
82	Function Room Set-up	Function rooms are the actual environments where the event's programming happens (CIC, 323). The most commonly used function rooms are meeting rooms. The conference planner can use this checklist to help identify the use, equipment and materials needed within each function room.
85	Shipping	Good planning and follow-through are the keys to getting materials to their destination on time and in good condition (CIC, 391). The conference planner can use this checklist to help ensure that event materials are shipped timely and securely.
86	Special Programs & Entertainment	Planning special events and entertainment requires the same strategies as other aspects of planning an event (CIC, 209). The conference planner can use this checklist to help identify the steps of planning special programs and events.
88	Transportation	For some events, it is necessary to coordinate and offer air and ground transportation for event participants, staff and VIPs. The conference planner can use this checklist to help coordinate transportation services.
90	Virtual Conferencing	Virtual conferencing can make a significant impact on organizational effectiveness and the bottom line by reducing travel and speeding communication (CIC, 255). The conference planner can use this checklist to help select a webcast supplier and set up a virtual conference event.

## CHECKLIST: PLANNING PROGRAM CONTENT

### Defining topics and content

- Use data from attendee research to define topics and content
- Balance the schedule of educational sessions with time for networking and recreation

### Developing session formats

- Lecture
- Audience reaction team
- Buzz group
- Colloquium
- Debate
- Fishbowl
- Interview
- Seminar
- Workshop
- Symposium

### Speaker selection

- Determine the needs of your audience
- Establish the dates, times and budget
- Identify the type of speaker you need
- Create a time line for booking
- Locate resources
- Review options and interview candidates

### Working with speakers

- Speaker confirmation packets
- Travel arrangements and transportation
- Date, time and place of presentation
- Accommodations and meals
- Fees, reimbursements and payment terms
- Whether you want the speaker to attend social events
- Whether the speaker may sell products and, if so, how this will be handled
- Procedures on handouts and materials
- An agreement on any audio or video recording of the presentation
- Cancellation policies
- Audiovisual requirements
- Legal implications, if any, your contract may contain
- Furnish speaker with background information
- Use technology to promote attendance
- Set the stage
- Evaluate the results

## CHECKLIST: CONTINUING EDUCATION

### Adult learning objectives

- Improve-existing skills and gain new skills
- Gain professional knowledge
- Achieve recognition for improved skills and/or knowledge
- Achieve licensing or certification as a requirement to practice or a condition of employment
- Achieve professional advancement or change careers

### Types of continuing education components

- Licensing or required industry certification
- Recognized professional certification
- Recognized Continuing Education Units (CEU)
- Nonaccredited continuing education

### General requirements for education programs

- Program selection
- Needs assessment
- Course approval criteria
- Specific learning objectives
- CEU reporting system and records processing
- Evaluation
- Budget review

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## CHECKLIST: SITE SELECTION

### Event Requirements and History

#### Define event requirements

- Goals and objectives
- Number of participants
- Location of participants
- Event rotation schedule
- Preferred activities
- Urban, suburban or resort setting
- Pre- and post-convention trips
- Spouses and families attending
- Special needs
- Luxury versus modest accommodations
- Event budget

#### Prepare event specifications

- Preferred dates and optional dates (if available)
- Number and type of guest rooms (including complimentary rooms and suites)
- Number, size and usage of meeting rooms
- Range of acceptable rates
- Dates and types of food and beverage events
- Exhibits and other special events or activities
- Special requirements

#### Review event history

- Past facility and service usage
- Past promotional assistance provided by the facility, DMAI-MINT, etc.
- Past guest room use (original block and actual usage)
- Breakdown of single, double and multiple occupancies
- Number of no-shows
- Number of rooms booked outside the room block

- Food and beverage guarantees and actual consumption
- Meeting and exhibit space used
- Audiovisual (A/V) requirements
- Registration patterns
- Arrival and departure patterns
- Service areas such as registration, ticket sales and parking

#### Prioritize negotiating points

- Flexible event dates
- Meeting room set-ups
- Arrival and departure patterns
- Guest room rates
- Products or services provided

#### Prepare short list of prospective destinations

- Search events industry websites
- Contact prospects by phone, fax or email
- Request proposals in writing (fax, email, mail or online RFP)
- Arrange site visit

## CHECKLIST: SITE SELECTION *(continued)*

### Convention and Visitors Bureaus

#### Contact bureau representative

- Discuss event requirements and history
- Ask for a list of services and materials:
  - Badges
  - Banners
  - Brochures, flyers, slides, maps, etc.
  - Children/spouse programs
  - Photocopying machines
  - Housing bureau
  - Interpreters
  - News releases
  - Official greeting
  - Parking permits
  - Registration assistance
  - Ribbons
  - Spouse and family programs
  - Tours
  - VIP gifts
  - VIP transportation
  - Welcome letter
  - Other

#### Request directory of suppliers

- Advertising
- AIV services
- Car rentals
- Carpentry
- Catering
- Decorations
- Destination management companies

- Duplication services
- Entertainment
- Exhibit service contractors
- Floral arrangements
- Freight handlers
- Furniture and equipment
- Media relations/public relations
- Modeling agencies
- Photography
- Printing
- Props
- Security
- Speakers
- Temporary personnel
- Transportation
- Other service providers

#### Discuss with bureau

- Local taxes
- Event-related rules, policies and licenses
- Union contract specifications
- Fees for bureau services
- Other

#### Request post-convention report

- Ask for complete postconvention report for:::  
from CVE and/or facilities
- Request MINT file information at  
**[www.destinationmarketing.org](http://www.destinationmarketing.org)**

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# CHECKLIST: FACILITY SELECTION

## Choose the Right Facility

### *Prepare for the selection process*

- Event goals and objectives
- Requirements and history Event specifications
- Site inspection checklist
- Facility questionnaire

### *Research Potential Venues*

- Convention centers
- Conference centers (executive, resort, corporate, educational, nonresidential, ancillary)
- Hotels (full –service, mid-level, limited-service, resort)
- Nontraditional venues (museums, galleries, restaurants, cruise ships etc.)

## Conduction Site Inspections

### *Schedule inspection*

- Before contract negotiations
- 1-2 years before event dates
- Before and after property renovation
- At same time of year as event dates

### *Conduct inspection*

- Make appointments with sales manager and/or CVB representative
- Bring notepad, cassette or video recorder, camera, facility, brochures and floor plans
- Meet with sales manager, operation staff, bureau representative, service vendors and national sale representatives
- Ask each contact/vendor about check-list points pertaining to their areas
- Record responses to questions and note concerns to discuss in negotiations

### *If delegating inspection duties:*

- Choose staff members or volunteers who live in/travel to destination
- Provide written event specifications
- Define purpose of site inspection
- Delimit responsibilities and expected outcome
- Provide guideline for reporting recommendations

### *Follow-up after inspection*

- That-you note for hospitality
- Questions or concerns not answered
- Intention to use or release space

## CHECKLIST: FACILITY SELECTION *(continued)*

### Negotiation Dates and Rates

#### **Tips for hotel negotiations**

- Provide accurate historical data (arrival/departure pattern, room pick-up, no-shows, occupancy mix, food and beverages functions, rooms-to-space ratio.
- Select two to four properties for negotiations
- Inform properties of their competition
- Learn status of market in destination city
- Consider seasonal competition (high, low or shoulder season)
- Leverage short lead time for better rates on unsold space
- Prioritize negotiating points
- Request rate quote for your group (standard, flat rate, or range of rates)

#### **Negotiable items**

- Room rates
- Comp rooms
- Suites and upgrades
- Food and beverage
- Meeting/function space (rental rates, 24-hour holds)
- Attrition and cancellation policies
- In-room amenities
- In-house services
- Cut-off date
- Discount for early payment of master account
- Round-trip limo service for VIPs
- Miscellaneous concessions

### High-Tech Facility Features

#### **Infrastructure**

- Diagram of termination points (well jacks) throughout entire facility
- Who installs additional wiring? Cost included or additional?
- If additional wiring is chargeable, will it require installation on overtime?
- Can you use your own contractor to extend service? If not, use in-house or union personnel?
- Will the event be charged for additional wire/fiber and related materials?
- What is the estimated time frame to complete additional wiring?
- Will installation time impact move-in and time to test connections?

#### **Network Connectivity**

- Does facility have equipment needed to build computer networks (switches, hubs, repeaters, etc.)
- How extensive a network can be built? (e.g., for large exhibition)
- What is the amount of inventory and type or equipment
- Who will design and make the installations? (in-house expertise or contracted out)
- What is the level of technical support available during the event?
- Is that support included in the price or it additional? How is this priced?
- If you have your own staff or contractor, can you install your own equipment and tie into the backbone? Are there charges associated with this?
- At what speed can a signal be supplied?
- On what is the backbone built? If copper wire, what category?
- For specific uses such as video transmission, is fiber-optic cable available?

## CHECKLIST: FACILITY SELECTION *(continued)*

### **Telecommunications**

- Who provides telecommunications service in the facility? (local carrier, industry-specific contractor or in-house service)
- What is the level of support provided while your event is in the building?
- Will staff be present, or will some be on call?
- What is the normal capacity of the provider?
- Can the provider activate additional lines if they go over capacity, or is there a waiting period?
- Can the provider assign a block of numbers before the event, or will that be done on site?
- If a block can be reserved, can numbers be assigned as specific extensions to meeting offices and other locations?
- Can these numbers be provided in advance, for publication in meeting materials?
- Does the facility have its own switch on site, or do lines come into the building from the local carrier?
- Does the facility feature analog lines for conventional phone service, fax and modem?
- Are digital multi-lines available?
- Is wireless telephone service available? If so, what is the range of each instrument?
- Is the entire building covered, or are there reliability concerns?
- Can you bring in a line or multiple lines direct from the local carrier or a long distance carrier?
- How much time is needed in advance to have this completed, and what are the additional charges?

### **Internet Access**

- Does the facility have an internet service provider (ISP)?
- Do you have to use that provider, or can you use your own? If so, what is the charge?
- What is the level of service? Is someone on site or on call?

### **Internet Access *(continued)***

- Does the ISP have tier 1 connectivity, or does it purchase connectivity from another provider?
- At what speed can internet service be provided and to how many users?
- Does the facility have permanent service by ISDN, T-1, T-3 or DSL? How many lines are available in the center?
- Can IP addresses be assigned in advance for computers that will be accessing the Internet?
- Can the center offer webcasting? If so, is the service provided in-house or is it contracted out?
- Can the facility construct an intranet specifically for the event?
- Can the facility build a website for the event or for individual exhibitors?

### **A/V Production**

- If a production is to be transmitted to a remote location, what method is available? (satellite or point-to-point)
- Can the facility transmit a daily schedule of events over a CCTV system throughout the center? Area hotels?
- If so, how frequently can it be updated to respond to changes in schedules?
- Is there a CCTV system available to sell time to exhibitors or to transmit other show-related information?
- Can the facility assist with the production of on-site video segments?
- If a wireless system is available, are repeater antennas permanently in place, or will they be installed to specifications of the event?
- Where are the repeaters located? Are there additional costs for placement of antennas?
- Is the wireless system based on line of sight? If so, could rigging or multilevel booths interfere with reception? What conditions could interference that might disrupt the signal?

# CHECKLIST: ACCESSIBILITY

## Facility

### General

- Hotel and/or facility to staff trained to provide appropriate service to people with disabilities
- Registration desk accessible to wheelchair users
- Meeting rooms centrally located
- Hallways and corridors have a 36-inch (91.44-centimeter) clearance and occasional spaces for turning and passing

### Emergency procedures

- Sprinkler system
- Fire-alarm pull boxes within reach of all guests
- Audible and visible fire alarms in public spaces and guest rooms
- Emergency exit doors clearly marked
- Doors leading to potentially dangerous areas identifiable by textured surfaces on the handle, knob or pull
- Each exit door equipped with a panic bar and has at least a 32-inch (81.28-centimeter) clear opening
- Facility staff instructed regarding needs of people with disabilities in emergencies

### Hotel rooms

- At least 2 percent of sleeping rooms barrier free (accessible to people with disabilities), with at least 1 percent of these having roll-in showers (ideally, all of the accessible features would not be present in one or two adapted rooms but divided among at least three to five rooms)
- Adapted rooms with options of king bed or two doubles (some disabled people travel with personal assistants)
- Adapted rooms located near elevators
- Door handles should be levers
- Peepholes usable by people with disabilities
- Key-card system should allow those with dexterity difficulties to use it effectively

### Hotel rooms (continued)

- Doors and hallways inside rooms have 32-inch (81.28-centimeter) clear openings
- A 32-inch (81.28-centimeter) clearance on at least one side of the bed
- Furniture placement that allows for turning and movement of a wheelchair
- Bathroom door opens outward
- Sink mounted at least 29 inches (73.66 centimeters) from floor with toe clearance under drainpipe (measure the sink height from floor to the apron)
- Hot water pipes and drains wrapped in insulation or protective covering
- Toilets no higher than 29 inches (73.66 centimeters) off the floor
- Sink and tub controls easily operated with a closed fist
- Grab bars mounted securely by the toilet and tub or shower (rooms that are not adapted but have grab bars in the bathtub and commode areas are appreciated by guests who may not define themselves as disabled but who need extra support because of an injury or aging)
- Shower chairs or benches made available through housekeeping can make an unadapted room usable by a person with a disability if there is a flexible hose with a handheld shower head in the tub/shower
- Housekeeping alerted to place towels within reach of person in a sitting position
- Phones, remote controls, thermostats and light switches within easy reach of the bed
- In rooms adapted for hearing-impaired or deaf guests, phones and other communication devices should be equipped with visual cues (lights)
- Access to refrigerators for people who require regular medications that must be refrigerated

## CHECKLIST: ACCESSIBILITY *(continued)*

### **Meeting rooms**

- Centrally located
- Doors have at least 32-inch (81.28-centimeter) clearance
- Floors nonslip, level and negotiable by unaccompanied people in wheelchairs
- Temporary ramps available for use with all raised podiums or head tables
- Microphones available that are easily adjustable and on flexible holders
- Lighting should be non-glare, nonreflecting and non blinking
- Are heating/cooling systems so noisy as to make hearing difficult?

### **Entrances, corridors and stairs**

- Approaches to building entrances should be hard surfaces at least five feet (1.52 meters) wide
- Approaches to accessible entrances marked with the international symbol for access
- Single-door entrances must be a minimum of 32 inches (81.28 centimeters) wide, double doors at least 48 inches (121.92 centimeters) wide
- Accessible doors adjacent to all revolving doors and unlocked
- Doors that can be opened easily by a person in a wheelchair and stay open long enough for the person to get through.
- If doors stick or are heavy, door-opening devices should be put in place.
- Automatic door openers should not operate in a manner that would be dangerous to guests
- Door sills level with inside and outside surfaces
- Door mats should be stationary, less than 0.5 inches (1.27 centimeters) thick and flat or recessed
- Handles, pulls, latches, locks and other devices on accessible doors should be easily grasped or able to be operated with a closed fist

### **Entrances, corridors and stairs *(continued)***

- Easy-to-grasp handrails installed on both sides of all stairs
- Signage inside building visible to people in wheelchairs
- Suspended stairs have warning devices to alert people with visual impairments of reduced head room

### **Elevators**

- All levels of the building served by elevators
- Elevator doors have 32-inch (81.28 centimeter) clearance and automatic safety reopening devices
- Audible and visible signals indicate elevator movement
- Internally, the elevator has:
  - A space no greater than 1.25 inches (3.18 centimeters) between the floor and the platform
  - A space large enough for a wheelchair user to turn and face the door
  - Call buttons free of obstructions to allow access by a wheelchair user
  - Control panels low enough to accommodate wheelchair users
  - Floor numbers in Braille

### **Restaurants and lounges**

- Self-serve counters no higher than 34 inches (86.36 centimeters)
- Buffet lines 36 inches (91.44 centimeters) wide with turning space at corners
- Menus available in Braille and large print
- Part of the main counter accessible to wheelchair users
- Alternate service routes in place if the above cannot be achieved in an older building
- Entrances to food establishments have doors with 32-inch (81.28-centimeter) clear openings, accessible level handles and negotiable thresholds

## CHECKLIST: ACCESSIBILITY *(continued)*

### **Restaurants and lounges *(continued)***

- Restaurant staff trained to serve guests with disabilities (menu changes, reading menus, tray assistance, etc.)
- All areas of lounges accessible, including tables, aisles, game rooms and dance floors

### **Public restrooms**

- Accessible restrooms clearly marked
- Doors have a clear opening of at least 32 inches (81.28 centimeters)
- Measurements same as in sleeping rooms for:
  - Height of sink
  - Protection of hot water conduits
  - Lever-type faucet controls
  - Grab-bar placement
  - Floor space clear for approach to stall and to sinks
- Restroom dispensers and accessories accessible to a person using a wheelchair
- Flush controls hand operated and mounted no more than 44 inches (111.76 centimeters) from floor
- Men's restrooms have at least one stall-type or wall-hung urinal with elongated rim at a maximum height of 17 inches (43.18 centimeters)

### **Telephones**

- Each bank of public phones should have a wheelchair-accessible unit
  - Phone directories at wheelchair level
- Telecommunications devices for the deaf (TDD) or speech impaired available in public phone banks and/or at the registration desk

### **Water fountains**

- Positioned to be accessible to someone in a wheelchair
- Controlled by push buttons or easily operated levers
- Location described for visually impaired people to alert them to a possible obstruction

### **Transportation**

- Lift-equipped vehicles available

### **Parking**

- Designated parking spaces located within 200 feet (60.96 meters) of building and not occupied by maintenance trucks, employee cars or cars of able-bodied guests
- Number of designated spaces corresponds to the ADA guidelines: generally one designated space per every 25 total spaces
- Designated parking spaces clearly identified by the international symbol for access
- Accessible parking spaces have adequate clearance: five- to eight-foot (1.52- to 2.44-meter) wide adjacent aisle (larger for vans) and 98-inch (248.92-centimeter) vertical clearance for vans along the route to the accessible parking space
- If parking spaces are not close to building, provide valet parking curbside
- Access from parking lot to the building clear of loose gravel and other impediments
- Passenger loading zone should have curb cuts and an accessible aisle parallel to the vehicle pull-up space

### **Walks, curbs and ramps**

- Slope of all ramps is one inch (2.54 centimeters) of rise to every 12 inches (30.48 centimeters) of run
- Sidewalks and ramps at least 36 inches (91.44 centimeters) wide
- Ramps have a five-foot (1.52-meter) level landing at top, at bottom, at ramp direction changes and at resting intervals
- Ramps have tactile warning surfaces and/or are visible through color change (ramps function for wheelchair users, people pushing baby carriages and bellhops. An able-bodied person needs the surface warnings also)
- At least one accessible route from the parking area to the building entrance is clearly marked

## CHECKLIST: ACCESSIBILITY *(continued)*

### ***Walks, curbs and ramps (continued)***

- Grounds, walks, and floor surfaces along accessible routes are stable, firm and relatively nonslip under all weather conditions
- Walkways to all fire exits clear of debris and ice
- Gratings designed so openings are not wider than 0.5 inches (1.27 centimeters). If gratings are elongated, grating should be perpendicular to direction of travel
- Temporary ramps should meet standard ramp requirements and be anchored securely
- Ramps and landings with drop-lifts have curbs at least two inches (5.08 centimeters) high, and walls, railings or projecting surfaces to prevent slipping

### **Program**

- Budget appropriately for disability accommodations (usually 5 to 7 percent of overall accommodations budget)
- Provide an opportunity on the registration form to self-identify as a person with a disability
- Assign a staff person or volunteer to coordinate disability services
- Individual with a disability should be consulted as to the accommodation, but the accommodation does not necessarily have to be exactly what is requested.
- Communicate with hotel to verify the need for adapted hotel and meeting rooms
- Communicate with convention facility to verify accommodations needed in meeting rooms
- Communicate with all speakers and exhibitors regarding the need for their materials to be in alternate media
- Provide print material in alternate media. This request may be made by both visually impaired people and people with learning disabilities (communicate with the person making the request; the alternate media can be Braille, large-print text, audiotape or computer files)
- Provide interpreters for deaf and blind attendees
- Provide sighted guides and orientation and mobility specialists for visually impaired attendees
- Provide note takers or scribes
- Provide sign-language interpreters (communicate with the person making the request as to the type of interpreter: American Sign Language, Pidgen Signed English, Signed Exact English or Oral Interpreters)
- Offer assistive listening devices (ALD) for people who are hard of hearing
- Offer real time captioning (may be needed by people who are late-deafened or who have learning disabilities)
- Provide water bowls for guide dogs at coffee breaks
- Have a resting room for people with chronic health disabilities
- Have a quiet room for people with mental health disabilities
- Offer longer breaks between sessions for people with ADD or ADHD
- Request room sets that accommodate wheelchairs and guide dogs

## CHECKLIST: CONVENTION SERVICES

### ***Set up meetings with the convention services manager***

- Preliminary planning meeting
- Ongoing communication
- Pre-convention briefing
- Daily briefings during meeting
- Post-meeting critique

### ***Questions for the convention and visitors bureau CSM***

- To whom do you report?
- Will you attend a pre-promotion trip one year before the event?
- What are the standard services for all groups?
- What additional services are available?
- What do you charge for these services?
- Is there a limit to the number of free brochures, visitors' guides and maps I may receive?
- What information do you need me to provide?
- When do you need my registration requirements?
- How will you work with my local committee?
- Does the city provide shuttle service? At what cost?
- Do you offer housing management? At what cost?
- Will you provide greeters to direct attendees during the meeting?
- Will you provide a visitors information desk with restaurant reservation service?
- Will you attend the pre-event and post event briefings?

### ***Questions for the hotel CSM***

- To whom do you report?
- Whom do you supervise?
- Do you write the resume (function sheet) for the meeting? If so, what information do you need from me and by what deadline? Who will receive these resumes?
- Do set-up crews report to you?
- Do you prepare the food and beverage BEOs? If not, who does?
- Who handles breaks and service to hospitality suites?
- At what times will you be on property before, during and after the meeting?
- How can you be reached at all times?
- Who is your backup person in case of emergency and how can that person be reached?
- Do you handle arrangements for meeting room signs and lobby bulletin boards?
- Do you arrange for audiovisual, entertainment and decorating services?
- What, if any, is your role in assigning guest rooms for VIPs, entertainment/hospitality suites, complimentary rooms?
- Do you arrange ground transportation from and to the airport?
- Are you the liaison with local fire and safety officials or do I work directly with them?
- Do you check the master billing statement before the hotel submits for payment? If so, do you handle questions regarding charges?
- Do you handle gratuities for service people? Will you obtain receipts?
- Will you schedule and attend the post event critique.

## CHECKLIST: CONVENTION SERVICES *(continued)*

### **Questions for the convention center CSM**

- Do you report directly to the facility's general manager/director?
- Who takes direction from you?
- What time will you be on duty before, during and immediately after the meeting?
- How can you be reached at all times?
- Who is your backup person in case of emergency and how can that person be reached?
- In case of emergency, who is responsible for making the contacts - the CSM or the meeting planner?
- Does the facility have a computer assisted drawing (CAD) system to provide diagrams or do they rely on the audio visual provider or exhibit services contractor?
- Do the facility function sheets include diagrams?
- What services are provided in-house?
- Who are your exclusive contractors?
- Who are your recommended contractors?
- How does the CSM interact with exclusive contractors?
- What is the CSM's role in relation to the general service contractor?

### **Questions for the convention center CSM *(continued)***

- Are you the sole liaison with local fire and safety officials or does the general service contractor work directly with them?
- How are services that are provided to exhibitors by the facility (or by exclusive or preferred contractors) handled? Do contractors provide forms for the exhibitor kits? Do I work directly with each provider or through you to order these forms?
- Will you be involved in any other events immediately before or after our event?
- What information do you need from me, and when is the deadline for receiving my event specifications guide? To whom will this information be distributed and when? If there are subsequent changes in this information, how will those be handled?
- Will you arrange and attend the pre-event and post-event briefings? Will you arrange for the service providers to be present?
- Will you be available or be allowed to come on site for the meeting immediately before the one being held at your facility?

# CHECKLIST: EVENTS SPECIFICATIONS GUIDE

## Creation and Use

- Create and distribute planning time line
- Organize tabbed binder for guide
- Record and file information as it is received
- Distribute guide at least one month before meeting
- Update guide as new information is received
- Date and distribute revisions to distribution list
- Use guide to conduct pre-con meeting
- Refer to guide to answer questions on site
- Save guide as template for next meeting

## Content and Format

### General information

- Event profile, goals and objectives
- Host organization information
  - Group name
  - Contact name and title
  - Addresses (shipping/ mailing)
  - Phone numbers (voice/fax)
- Supplier partners' contact information
  - Name and title
  - Organization
  - Addresses (shipping/ mailing/ email)
  - Phone numbers (voice/fax/pager/ cell phone)
  - Event dates (including pre- and post event activities)
  - Event location
  - Number of attendees
  - Attendee profile and demographics
  - Other contacts and their roles
  - VIPs (staff, speakers, board, etc.)
  - Committee members and volunteers
  - Emergency policies and phone numbers

### Financial information

- Authorized signatures (event changes/ expenditures)
- Billing information
- Accounting procedures

### Facilities' and services' names/ addresses/ phone numbers

- Headquarters hotel
- Convention center
- CVB sales/ event services
- Transportation company
- A/V company
- Production company
- Destination management company (DMC)
- Computer/ office equipment rental company
- Exhibit/ material-handling company
- Service contractor
- Decorator
- Off-site event venues
- Sign/ printing company
- Security company
- Entertainment company
- Florist
- Speakers/ speakers bureau
- Official air carrier
- Official shipping company
- Official car rental company

## CHECKLIST: EVENT SPECIFICATIONS GUIDE *(continued)*

### **Logistics**

- Reservation procedures for hotel/housing bureau
- Registration procedures
  - Meetings
  - Events
  - Hotel rooms
  - Online registrations
- Function room set-ups
  - Event orders
  - Set-up diagrams
  - Audiovisual (NY) needs
  - Utilities
  - Shipping and receiving
  - Transportation
  - Special needs (diet, tradition, disabilities, amenities, deliveries, housekeeping, etc.)

### **Program**

- Day-by-day and hour-by-hour event schedule
- Events
- Meals
- Offices
- Registration area
- Lounges
- Speaker-ready room
- Press room
- Storage
- ICW (in conjunction with) groups
- Special events
- Companion tours
- Family programs
- Pre- and post-event tours
- Other recreation
- Food-and-beverage information
  - Banquet event orders
  - Dietary needs

### **Program (continued)**

- Potential meal activity if not scheduled
- Recycling requests
- Leftover food distribution
- Resort usage (golf, tennis, spa, etc.)
- Public relations (specify date, day, time)
  - Safety and security needs
  - Publicity
  - Crowd control
- Potential gratuity list
- Evaluation form for meetings, hotel, convention center

### **Exhibits**

- Location
- Registration
- Move-in and move-out
- Exhibit hours
- Number of exhibits
- Exhibitor list
- Floor plans
- Policies
- Storage areas
- Food and beverage event orders for exhibit hall

# CHECKLIST: RISK MANAGEMENT

## Emergency Action Plan

- Prepare emergency action plan for various scenarios
- Coordinate with facility emergency action plans
- Designate people in charge and their responsibilities

## Medical Emergencies

### Survey membership for:

- Average age
- Usual activity level
- Past event experiences
- Medical conditions
- Needs of people with disabilities

### Train meeting staff to:

- Recognize problems and to act
- Keep their CPR and First Aid certifications current
- Know the emergency procedures for this event

### Ask hotel or convention center representatives:

- Is there a written medical emergency plan?
- Is there a first-aid station? How is it staffed and equipped?
- What are its hours of operation?
- What are the organization's liabilities for emergencies?
- Is there a house physician? When is the physician on call?
- How are emergency care procedures initiated within the facility?
- Which staff members have CPR training?
- Are wait staff trained to perform the Heimlich Maneuver?
- What is the name and phone number of the nearest hospital?
- Who is responsible for ambulance service and what is the phone number?

## Demonstrations and Confrontations

### Assess potential for organized protest and consider:

- Hiring a security consultant
- Briefing the organization's leaders, staff and facility officials
- Consulting with local police and facility security
- Hiring additional security

### If a protest does occur:

- File a citizen's complaint  
confer with leadership of protest group
- Arrange an organized forum for protest group
- Arrange a press conference
- Ask speakers to be available for interviews
- Brief staff on organization's position
- Clarify procedures for handling press
- Ensure that only briefed persons talk to the press

## Fire Safety

### Ask the facility or facilities these questions:

- Is there a written emergency plan for fire and evacuation?
- Does it include meeting and exhibit areas?
- Is it understood by facility staff?
- What actions will the facility take when an alarm sounds?
- Are all the guests notified in the event of a fire? If not, what is the procedure for notifying guests?
- Is there a primary assembly point for evacuees?
- What is the evacuation plan for attendees with physical challenges?
- Are there alarm switches on each floor?  
Do alarms alert the fire department directly?

## CHECKLIST: RISK MANAGEMENT *(continued)*

### Fire Safety (continued)

- What does the fire alarm sound like? Is it a bell, horn or slow whoop?
- Is there a paging or telephone system that reaches all occupants simultaneously?
- Are all exits clearly marked in hallways and rooms?
- Do all exit doors open in the direction of travel?
- Are stairwells open to ground and roof?
- Are stairwells enclosed?
- Do meeting rooms have at least two exits remote from each other?
- Do sleeping rooms, meeting rooms, service areas, exhibit areas, etc., have sprinklers?
- Is emergency lighting on a separate power system?
- Are exit signs on the emergency lighting system?
- Are fire hoses and extinguishers located on every floor?
- Are smoke detectors located in all sleeping rooms, meeting rooms, exposition areas, restaurants, hallways, etc.?
- Are elevators automatically locked in case of fire?
- Are building ventilation systems turned off automatically in case of fire?

### Fire Safety (continued)

- Are any flammable materials stored or used in stairwells?
- Are all electrical circuits in sleeping rooms, meeting rooms and exhibit areas grounded?
- Are the electrical outlets in the bathrooms GFI protected?
- Can sleeping-room windows be opened?
- Where is the fire department located in relation to the facility?
- When was the facility last inspected by the fire department? Were any violations found? Have they been corrected?
- What is the fire department's emergency number? (Do not assume it is 911)
- What is the emergency number for the facility's security offices?

### Other Contingencies

- Consider impact of bad weather
- Plan for delayed departures/arrivals
- Inquire about possible union strikes or labor shortages
- Ask about facility policy on Mass Care Facility Operation
- Identify local agency for handling hazardous materials

## CHECKLIST: EXHIBITS

### Facility

#### **Exhibit area, general**

- Number of halls, floors
- Proximity to meeting rooms
- Sound system
- Wireless internet access
- Phone access (wired and cellular repeaters)
- Food and beverage service (known as catering in convention centers vs. F&B in hotels)
- Signage
- Total square footage/meters
- Obstructions: columns, vents, ducts, etc.
- Floor load
- Floor construction material
- Ceiling heights, hanging sign restrictions
- Ventilation controls
- Heat or air conditioning available or provided during set-up and dismantle
- Access areas, handicapped easements
- Maintenance, housekeeping
- Restroom locations
- Lighting, type, foot candles at floor
- Potential registration areas
- Exclusive contractors

#### **Access to exhibit area**

- Streets
- Doorways
- Corridors
- Elevators/escalators/ stairs
- Loading/unloading facilities (number of docks, marshaling yard access)
- Limitations (weight, dimension, delivery schedules, traffic)
- Where security guards are needed and at what dates and times
- ADA (Americans with Disabilities Act) compliance

#### **Local/governmental restrictions**

- Fire marshal
- Sales tax issues
- Preferred and exclusive contractor issues
- Convention and visitor bureaus, housing bureaus
- Union labor rules

#### **Floor plans**

- Scale
- All dimensions shown
- Variations shown (floor loads, ceiling heights, obstructions, fire apparatus, right-of-ways, catwalks, etc.)
- Entrances, exits marked
- Utility access shown (telephone, electrical, fiber optics, wired internet and wireless capabilities, plumbing) if from floor ports or ceiling
- Overall floor plan showing meeting rooms, registration areas, bus drop-off

#### **Utilities**

- Limitations, accessibility, backup in case of failure
- Electricity
- Lighting (spot, special)
- Gas
- Telephone
- Internet
- Compressed air
- Steam
- Water
- Drain

#### **Facility space rates**

- Rate for show days versus set-up and dismantle days
- Coverage included (area, facility, equipment, services)
- Payment, deposit requirements
- Insurance requirements

## CHECKLIST: EXHIBITS *(continued)*

### Facility *(continued)*

#### Labor

- Exhibit installers (unions utilized, job scope)
- Electricians (unions utilized, job scope)
- Plumbers (unions utilized, job scope)
- Riggers (unions utilized, job scope)
- Other skilled labor (unions utilized, job scope)
- Unskilled labor (unions utilized, job scope)
- Material handling
- Union jurisdictions, requirements, restrictions
- Pay scale (include straight time, overtime and holiday rates)
- When are union contracts coming up for renegotiation/renewal?
- Exhibitor-appointed contractor guidelines

#### Signs

- On entrance unit to exhibit hall
- Registration (attendee, exhibitor, press/VIP)
- Transportation (shuttle routes)
- Directional
- Meeting rooms
- Booth identification
- Aisle identification
- Ticket sales
- Exhibit hours
- Sponsors
- Cost of sign placement, sources

#### Booth décor

- Pipe and drape
- Masking pipe and drape
- Aisle carpet
- Standard furniture
- Custom furniture
- Special entrance units
- All-inclusive rental exhibits (exhibit packages)

#### Sources of exhibit services

- Exhibit hall or convention center
- Hotel
- Convention and visitors bureau
- Your organization
- Contractors (general service contractor, exclusive contractors, exhibitor-appointed contractors, specialty contractors)

#### Check charges by facilities and/or service charges for:

- Show management office, furnishings, utilities and re-keying
- Facility security versus exhibit hall perimeter security
- Fire marshal
- Structural engineer
- Emergency medical services
- Official service contractor, exclusive contractors and specialty contractors service desk
- Shuttle services
- Utilities
- Material handling
- Crate storage
- Accessible storage
- Food, beverage
- Florist
- Public address system
- Telephone, fax
- Computers, high-speed or wireless internet access
- Parking
- Press rooms
- Business services
- Models
- Photographers

## CHECKLIST: EXHIBITS (continued)

### **Investigate freight management details**

- Conflicting or overlapping shows
- Shipping address
- Material handling fees
- Material handling minimums
- Check-in and checkout procedure at exhibit area
- Schedule of placement in booths, removal
- Storage facilities
- Shipping procedures to advance warehouse and to show site
- Delayed outgoing procedures
- Dock facility and availability
- Handling of small package deliveries
- Marshaling yard(s) and possible fees

### **Insurance**

- General liability insurance for facility, contractors and exhibitors
- Who is named as additional insured(s) on exhibitor's policy? Venue, show organizer, show manager, general service contractor?
- Event cancellation/postponement

### **Regulations**

- Alcohol
- Building inspector/structural engineer
- Fire
- Licenses (music, sales tax, etc.)
- Exhibitor activities
- Cleanup
- Special permits (from fire marshal for special gases)
- ADA (American with Disabilities Act)
- Union jurisdictions

### **Exhibitors**

#### **Exhibit and booth limitations**

- Smoking
- Confines of booth area
- Height
- Weight
- Fire retardancy
- Lighting

### **Exhibit and booth limitations (continued)**

- Operating displays
- Noise (decibel level)
- Food, beverage
- Personnel
- Hanging signs

### **Exhibitor charges**

- Accessible storage
- Badges for staff
- Booth space or package price including standard furnishings
- Carpet/pad rental
- Catering
- Cleaning
- Exhibit rental
- Facilities, equipment, services (i.e., electricity, telephone, wired or wireless Internet, access, AIV and computer rental)
- Floral
- Forklift (in booth)
- Furniture (standard or custom)
- Graphics
- Hostesses, models
- Lead retrieval systems
- Labor (regular, overtime) (could be I&D labor, rigger labor, forklift labor, electrical labor, internet labor, etc.)
- Material handling
- Photography
- Riggers for hanging signs and machinery
- Security guards
- Signage
- Travel and lodging
- Giveaways

## CHECKLIST: EXHIBITS *(continued)*

### Exhibitors (continued)

#### **Exhibitor Prospectus**

- Show location, dates
- Purpose, value proposition
- Registrant profile (including demographics and whether the event is audited)
- Past exhibitors
- Show management contact information
- Schedules (exhibits, program, events)
- Eligibility to exhibit
- Application procedures
- Costs
- Promotional opportunities, including sponsorship and advertising

#### **Exhibitor Service Manual**

- Rules, regulations (exhibitor appointed contractor regulations)
- Shipping instructions
- Total and unopposed exhibit hours
- Targeted inbound freight dates and times
- Day and hour of exhibit installation
- Day and hour of exhibit dismantling
- Material handling information
- Storage location for empty crates and containers
- Rules and regulations of the facility, including union labor work rules
- Booth description
- Materials/construction restrictions/regulations
- Fire safety regulations
- Registration hours and location
- Security information
- The housing reservation
- Official travel agency (if applicable)
- Official carrier, airline or other transportation (if applicable)
- Public transportation information (including prices)
- Shuttle service information
- Credit cards accepted
- Rental car agencies

- Exhibitor Parking
- Insurance requirements

#### **Factors in booth assignment policy**

- Eligibility
- Length of membership (if an association versus for-profit or public show)
- Past participation (years, total space)
- Date/time of application
- Sponsorship level
- Special requirements (i.e., near partners, away from competitors)

#### **Booth assignment notice**

- Booth number
- Booth size
- Invoice
- Housing and registration details
- Time line for exhibitor service manual

#### **Data needed by contractors**

- Exhibitor contact information (the contact who pays the bills and a secondary contact, such as an exhibit manager, who manages the logistics and will receive the exhibitor service manual)
- Booth location

#### **Exhibit promotion and publicity**

- Budget
- Target mailings, releases
- Advertising
- Schedule
- Media coverage
- Press rooms
- Required on-site facilities, services

## CHECKLIST: EXHIBITS *(continued)*

### Exhibitors (continued)

#### **Attendee promotion**

- Preliminary program
- Costs
- Tours
- Airline, rental car discounts
- Spouse information
- Housing
- Registration
- Ancillary events (keynotes, receptions, sponsored meals)

### Other Requirements

#### **Schedules**

- Exhibit facility rental
- Shipments (advance, current, outgoing, delayed)
- Exhibit set-up, inspection, dismantling

#### **Admission policy**

- Types of admission (open, badge, fee to access show floor, access to qualified attendees and exhibitors only)
- Classifications (staff, registrants, exhibitor, press, public, VIP, etc.)
- Off-hours admissions

#### **Management**

- Complaint procedures
- Reporting thefts
- Staff contact for security personnel
- Risk management

Excerpt from the Convention Industry Council's Manual, 8th Edition study guide for the Certified Meeting Professional program. Visit [www.conventionindustry.org](http://www.conventionindustry.org) for more information on the CMP program and purchase of full study guide.

## CHECKLIST: SUPPORT SERVICES

### **Determine support services needed**

- Convention services
- Reservations and housing
- Technology
- Transportation
- Shipping
- Registration
- Audiovisual
- Entertainment
- Hospitality
- Floral and decorations
- Stage lighting and production sound
- Production rigging
- Special effects
- Taking care of VIPs (transportation, special needs, etc.)
- Security
- On-site graphics and signage
- Photographers and videographers
- Power generator and portable heating and air conditioning specialists
- Party equipment, prop rental
- Equipment and/or tent rental
- Color guards and saber corps
- Team building facilitators
- Calligraphers
- Float builders
- Costumes

### **Obtain recommendations for suppliers and contractors from:**

- Convention and visitors bureaus
- Sales or convention services personnel
- Local professionals or those who have held events in the destination
- Professional associations (CIC members)

### **Request for proposal (RFP) to include:**

- Event name
- Date, time, location for service
- Details regarding scope and nature of work
- Appropriate diagrams or drawings
- Facility and event rules and regulations
- Statement regarding the supplier's responsibility to meet fire and safety codes, meet licensing and permit requirements, supply proof of insurance, and meet event facility requirements
- Prequalify suppliers before sending RFP
- Mail, fax or e-mail RFP to potential suppliers
- Make all change orders in writing and request acknowledgment
- Evaluate bids in terms of both specifications and price
- Seek expert advice when necessary

### **Negotiate contracts**

- Consider goals and objectives of entire event
- Seek expert advice when necessary
- Contracts reviewed by attorney

### **Coordinating support services**

- Schedule meetings to facilitate communication
- Inform all suppliers about major contractors
- Advise suppliers of work schedules and deadlines
- Determine whether services of event manager or special event manager required
- Determine whether services of a destination management company are required

## CHECKLIST: SUPPORT SERVICES *(continued)*

### **Volunteers and committees**

- Appoint a volunteer coordinator
- Create organizational chart
- Write job descriptions
- Determine duties, responsibilities and limits of authority
- Create sign-up form
- Match volunteer's skills and interests to the job
- Schedule regular meetings
- Provide on-site schedules
- Provide written instructions on site
- Explain what they are to do when task is complete (e.g., leave, report back)
- Explain the limits of their authority
- Establish procedures for reporting problems
- Provide meals, refreshments and parking
- Thank them with reception, gifts, mementos and thank-you notes

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# CHECKLIST: REGISTRATION

## Procedures

### Review:

- Past attendance, arrival/departure patterns, registration procedures
- Available personnel, facilities
- Classifications of registrants (member, exhibitor, speaker, spouse, guest, other)
- Identification required to register
- Information to be collected on registration forms

### Evaluate registration methods

- Advance using paper form
- Advance by web, using online form
- On-site using paper form
- On-site using computerized system
- On-site by web, using online form

### Set up systems to manage

- Pre-registration
- On-site registration
- Service/information centers
- Daily on-site counts (functions, guaranteed events, sessions)
- Lead retrieval (exhibitor prospects, CEUs)

## Registration Forms

### Format of forms

- Advance forms
- On-site forms
- Single, multicopy (NCR)
- Color coding
- Numbered, unnumbered
- Costs
- Supplier
- Delivery schedule

### Information and instructions on form

- Event name
- Event logo
- Event location
- Event dates
- Event website
- Information on how to return form
- Registration instructions
- Pre-registration cut-off dates and pricing
- Housing reservation cut-off dates and pricing
- Payment methods, credit cards accepted

## CHECKLIST: REGISTRATION *(continued)*

### Attendee Data

#### Contact information

- First name
- Middle initial
- Last name
- Title
- Organization
- Mailing address
- Mail stop (for large corporations)
- City, state, zip/postal code
- Country
- Phone and fax numbers (with country codes for international events)
- Email address

#### Badge information

- Badge name (first name or nickname as it will appear on badge)

#### Demographic information

- First-time attendee
- New member
- Marketing demographics (decision-making role, procurement budget, intent to buy, etc.)

#### Event registration information

- Registration classification
- Sessions attending
- Special events/functions attending
- Attendee type (speaker, author, chair, attendee, exhibitor, guest, staff)
- Ribbon categories

#### Fees/payment information

- Fees, charges
- Payment method (check, credit card, purchase order)

### Housing

- Preferred hotel (for citywide event, offer 1st/2nd/3rd choice)
- Type of room (single: one bed-one person; double: one bed-two persons; double-double: two beds-two persons; triple; quad; smoking; non-smoking)
- Need for special accommodations
- Arrival date/time
- Checkout date/time
- Sharing room with

### Special needs

- Accommodations for disability
- Special dietary needs
- Guest information

### Online Registration

#### Hosting your own website

- Design user-friendly online form (custom, template, smart form)
- Provide step-by-step instructions
- Designate required fields
- Help troubleshoot (frequently asked questions, email contact, customer service phone number)
- Give option to print form
- Use secure server for credit card processing
- Protect financial data using digital certificates
- Verify credit cards automatically
- Confirm registrations with unique confirmation number (email message, printable web notification)
- Integrate online forms with registration database

## CHECKLIST: REGISTRATION *(continued)*

### Online Registration (Continued)

#### *Using an application service provider (ASP)*

- Define services provided (customized forms, secure server, credit card processing, automated confirmation)
- Determine transaction fees
- Instruct staff on how to use password-protected administrative area (badges, lists, reports, changes)
- Confirm compatibility with your registration database
- Link to ASP website from event website

### Badges

- Type (plastic, embossed, paper, adhesive, clip-on, pin-on)
- Format (typed, hand-written, computer-generated)
- Color-coding
- Size
- Ribbons
- Lead retrieval (credit card badge, magstripe, bar code, smart card)

### Registration Lists

- Processing method
- Information included
- Pick-up, delivery
- Supplier
- Quantity
- Distribution
- Format (alphabetical, industry, registrant classification, etc.)

### Registration Packets

- Program
- Registration list
- Badge(s)
- Tickets
- Membership information
- Schedule changes

### Registration Personnel

#### *Evaluate numbers of people needed for:*

- Registration
- Clerks
- Cashiers
- Messengers
- Security
- Interpreters
- Information/service desks
- Greeters

#### *Possible personnel sources include:*

- Staff
- Volunteers
- Hotel
- Convention and visitors bureau
- Supplier

#### *Consider these cost factors:*

- Rates (hourly, by job)
- Overtime
- Sundays, holidays
- Special allowances (meals, parking, travel)

#### *Registration personnel management*

- Detailed written instructions
- Pre-event briefing
- Staff person in charge
- Post-event review
- Check-in, checkout procedures
- Schedules

#### *Explain in briefing and in writing:*

- All working forms
- Specific responsibilities
- Filing, record-keeping procedures
- Identification required to register
- Fees
- Reference aids
- Special policies, potential problems
- Courteous behavior (welcome first timers)
- Staff contact

## CHECKLIST: REGISTRATION *(continued)*

### Registration Personnel(continued)

#### **Accounting procedures and controls**

- Registration fees
- Ticket sales
- Publication sales
- Refunds, cancellations
- Check cashing
- Credit

#### **Money records and reports**

- Dates, time
- Cash at opening, closing
- Check totals
- Charge totals
- Opening, closing inventory

#### **Consider these security precautions**

- Cash boxes, registers
- Safety deposit boxes, vaults
- Guard service
- Check-in, checkout procedures
- Bonded cashiers

### Registration Area

#### **Inspect area for adequate:**

- Lighting
- Size, flexibility
- Telephone hookups
- Internet access
- Accessibility

#### **Designate information/service areas**

- Pre-registered
- On-site registration
- Ticket sales
- Information/messages
- Membership
- Emergency housing
- Hospitality
- Transportation
- Publication sales

#### **Designate information/service areas (continued)**

- Press relations
- Secretarial
- International registrants

#### **Order equipment (type and number)**

- Platforms
- Counters, tables
- Chairs
- Computers, printers
- Credit card authorization scanners (with phone lines)
- Typewriters
- Bulletin boards
- Easels
- Blackboards
- Cash boxes, registers
- Waste baskets
- Photocopiers
- Fax machines
- Telephones

#### **List specific office supplies needed**

- File boxes
- Date, number stamps
- Stationery, carbons
- Typewriter supplies
- Pens, pencils
- Staplers, tape, clips
- Rubber bands, scissors, rulers
- Tool kit

#### **Arrange for:**

- Signs to be set up
- Procedures for telephone charges, messages
- Rope, stanchions to direct traffic flow
- People to stand at queues and answer questions
- Other support services

Excerpt from the Convention Industry Council's Manual, 8th Edition study guide for the Certified Meeting Professional program. Visit [www.conventionindustry.org](http://www.conventionindustry.org) for more information on the CMP program and purchase of full study guide.

## CHECKLIST: COMPUTER APPLICATIONS

### **General vendor qualifications and viability**

- What is the origin of the company?
- When was it founded?
- Does the vendor understand my industry?
- Can the vendor provide customer references who are similar to us in size and work?
- Can the vendor provide quantifiable results of success?
- When was the last round of funding and how much?
- How much money has been raised to date?
- Who are the vendor's backers?
- How many employees total?
- How many core service staff (people who are most directly responsible for delivering the service you are buying) such as engineers and customer service and support?
- Have there been recent layoffs or signs of problems at the vendor?

### **Software development**

- Is the vendor's core technology developed by internal engineering staff, or is it outsourced to partner developers?
- If outsourced, how does the vendor support the technology and respond to customer issues?
- Was this online service originally designed as a true ASP that can handle millions of data records and transactions simultaneously from the central server?
- If the vendor was founded as a custom software shop (often the case with traditional travel and meeting management companies) or as a PC-based software vendor, ask specifically how it has changed the original system architecture to meet the scalability demands of the ASP service model.
- How does the vendor ensure quality control?
- Does the vendor use a third-party solution as part of its service offerings?
- If so, how integrated is the entire service offering?

### **Software development (continued)**

- How well does the vendor respond to customer issues and questions?
- What development tools have been used to build the application?
- Are the vendor's engineers certified on the servers, network gear and software? Is this in the contract?
- Has the technology been recognized by third-party endorsements?
- Can the vendor provide a system infrastructure diagram?

### **Vendor trust**

- What are the privacy policies?
- Does the vendor disclose the identities of its customers to other companies, or market to them itself?
- Does the vendor read customers' data?
- What is the vendor's code of ethics regarding customer privacy?
- Who audits compliance?
- Who certifies it?

### **Usability**

- Can web pages be easily branded with company colors and logos?
- Is the application flexible? Is it easy to add, customize and track new fields?
- Does it automate the customer communication with automatic confirmations and other forms of email broadcasts?
- Are these automated confirmations personalized with clients first or last names?
- How robust is the reporting?
- How many standard reports are available?
- Can data be queried for specific information?

## CHECKLIST: COMPUTER APPLICATIONS *(continued)*

### **Security and data protection**

- What level of data security, backup and disaster recovery does the vendor offer to ensure integrity of your customer and event data?
- How secure is the vendor's computing environment?
- Who audits the vendor's security?
- Do I need a firewall on my site for additional security?
- Is there a firewall protecting the database in addition to the one in front of the web server?
- What is the exact backup routine?
- What is the backup interval and procedure?
- Is there off-site backup?
- What is their access control policies and procedures to the servers?
- What is the level of data encryption?
- How much data could be lost in the worst-case scenario? (e.g., just the current transaction/the previous hour/the previous day?).
- What are the failover procedures? How long does it take?
- What are the vendor's policies regarding purging of data?
- At the time of data purges, can we receive a CD-ROM with all of our data for our archive?
- How many points of redundancy are in the system (web server only, web server and database, web server and database and application server, etc.)?
- How are financial transactions handled?
- What are the security procedures for handling credit cards?
- Are credit cards processed automatically and in real time?
- Can multiple payment types (credit cards, checks, purchase orders) be accommodated?
- Is secure socket layer technology used?

### **What tangible assurance can the vendor offer in terms of scalability?**

- What is the highest level of simultaneous users successfully handled?
- What is the highest number of simultaneous credit card transaction successfully handled?
- What is the highest number of daily site visitors successfully handled?
- Has the site traffic been verified by any third party?

### **Contract terms**

- How does the vendor price its services (e.g. per user/per month, per user/per transaction)?
- What services are included in the subscription fee (fee-set-up, help desk, software updates, online training, etc)?
- What is the length of the contract?
- What happens if I want to end the contract earlier than the stated length?
- Other than a web browser, what hardware/software, if any, is required at the company's site?
- What is the guaranteed uptime for the applications (i.e., 99.7 percent)? What happens if this service level agreement is not met?
- Lead time: How many days will it take between a signed contract and a customized, working registration site? (Often this can be an important indicator of customer service level as well as the viability of the technology. Well-designed ASP services are designed to be easily customizable and can accommodate large number of system users at the same time.)

## CHECKLIST: COMPUTER APPLICATIONS *(continued)*

### **End user training and support**

- What are the hours of service for the help desk services?
- Does the vendor provide 24/7 support for your application?
- What support is available after hours?
- Who provides first-line support (help desk services) for the application: you or the vendor?
- Is there a dedicated account manager or only call center support?
- Is formal product training offered?
- Are there consultative resources available for graphic design, data management and technical customizations?
- What is the average wait time to reach a live person at the help desk?
- Is there a response time guaranteed in the contract?
- Does the vendor provide implementation and training services?
- If not, who does?
- Does the vendor provide online training courses, manuals and frequently asked questions (FAQ) documents.
- Do these cost extra?

### **Exit strategy**

- What are the exit options if I am dissatisfied?
- What happens at the end of the contract?
- How I will get my data back, and in what form?
- Assuming the ASP has been providing this service for a year or two, how much data history will it return to me - all of it? Or less?
- Assuming I want to transfer to another ASP, will the vendor agree a seamless handover?
- Will they manage incoming email during the handover? If so, for how long?

## CHECKLIST: EVENT WEBSITES

### **Define the goals and objectives for the website**

- Increase attendance
- Sell more exhibit space and sponsorships
- Attract a more diverse pool of participating speakers
- Generate more press coverage
- Create new revenue opportunities
- Enhance customer service to attendees, members and other participants
- Build interactive online communities

### **Select basic features/functionality to meet goals/objectives**

- Home page with introductory information about upcoming event
- An agenda that includes time and date information for sessions and activities
- Pages that describe educational offerings including keynote presentations
- Exhibitor pages so that vendors can learn about the benefits of booking a booth
- A searchable database of exhibitors so that attendees can find exhibitors
- A registration page so that attendees can register online
- Hotel and travel information so that delegates can make travel arrangements
- A press section that provides journalists with quick access to event information
- A conference reminder email newsletter that offers event updates
- A FAQ page
- A contact page with the organizer's name, telephone and email address

### **Select advanced features/functionality to meet goals/objectives**

- Integrated registration, housing and travel to help attendees register and make arrangements at a single website
- Email marketing campaigns tied to an online registration database to track response rates to email promotions
- Personalized websites that enable delegates to customize their event participation
- Speaker and abstract management applications that streamline the process of working with speakers
- Webcasts that deliver audio and video content from your events to a global audience
- Merchandise sales through an e-commerce shopping cart for selling your books, videotapes, audiocassettes and other merchandise
- Online communities that offer participants numerous avenues for networking online
- Web-based educational programs that you offer in diverse ways to your audience
- Booth assignment applications that streamline the process of having exhibitors select their booth space for an upcoming event
- Trade show facilitation websites that enhance the trade show experience for attendees and exhibitors
- Business exchanges that deliver year-round marketplaces where buyers and sellers can conduct business online
- Online news while the event is in progress
- Web-based surveys to track the educational and other interests of attendees and prospective customers

## CHECKLIST: EVENT WEBSITES *(continued)*

### **Remember these key elements**

- Provide good-quality, comprehensive, up-to-date information about the event on the website
- Create a straightforward, global navigation system so that it is easy to find the desired information
- Keep graphics small enough so users with slow modems can access web pages quickly
- Ensure that the website is compatible with all major web browsers
- Don't require site visitors to have the latest technologies or software programs
- Create a secure web server to protect user credit card information and personal data
- Constantly check the website to make sure everything is working properly

### **Determine how to develop the website**

- Create your own website with end-user web-authoring software programs
- Have an in-house web development team build and manage the site
- Outsource the website development and/or the hosting of the site
- Use an application service provider (ASP)

### **Decide how to market and promote the website**

- Search-engine optimization to improve website rankings on popular search engine and directories
- Listing on events industry websites and portals that list upcoming events
- Targeted banner ads to drive qualified customers to the website
- Distributing news releases online to capture the attention of more editors and writers
- Affiliate programs that give incentives to other sites to drive traffic to the website
- Content syndication to build exposure for your organization by placing articles and news stories on other websites
- Offline or traditional marketing to direct customers and prospects to the website

# CHECKLIST: MARKETING, PROMOTION AND PUBLICITY

## Marketing

### **Marketing plan should answer these questions:**

- Is there demand for this event?
- What is/are the value proposition(s) for attending the event?
- How many competitors provide a similar event?
- Can you effectively compete on price, quality and delivery?

### **Marketing plan should include:**

- Target market analysis
- Competitive analysis
- Goals and objectives
- Marketing budget
- Promotional strategy or marketing tactics
- Measures of success

### **A marketing audit includes research into:**

- Marketing environment
- Laws and regulations
- Politics
- The current state of technology of each target audience
- Economic conditions
- Sociocultural aspects
- Demand trends
- Media availability
- Stakeholder interests
- Marketing plans and campaigns of competitors
- Internal factors such as staff experience and resource availability (both staffing and financial)
- Marketing environment
- Laws and regulations
- Politics
- The current state of technology of each target audience

### **Market research should reveal:**

- What are the opportunities?
- What are the threats?
- Who are the past attendees and potential attendees?
- Are there distribution channels that might not have been considered?
- Why will they want to attend the event? (networking, education, purchasing)
- What are their demographics? (geographic distribution, job titles, purchasing power, etc.)
- What other types of events do they attend? (when, where and what cost)
- Is your event competitive with those events?
- Where do they get their information?

### **Marketing mix includes:**

- Price
- Place
- Product
- Promotion

### **Identifying target market, segments, and tactics**

- Advertising (print, broadcast, indoor/outdoor)
- Internet (email mailing lists, newsgroups, websites, banner ads)
- Promotions (direct-mail brochures/flyers/postcards, contests, giveaways)
- Publications (magazines, newsletters, newspapers, directories)
- Publicity (media relations, press kits/releases/rooms)
- Sales (telemarketing, direct sales)
- Sponsorships (events, organizations, publications)

## CHECKLIST: MARKETING, PROMOTION AND PUBLICITY *(continued)*

### Marketing (continued)

#### **Marketing to an international audience**

- Cultures and customs, including legal
- Issues
- Countries and regions
- Languages
- Perceptions and attitudes
- Time zones
- Reasons for participation (value proposition)

#### **Preparing a promotional budget**

- Review amount spent on promotion of previous event
- Poll organizations with similar-size events for average promotional expenditures
- Estimate costs for each promotional tool based on estimates from suppliers
- Estimate promotion budgets of leading competitive events
- Match or exceed competitive expenditures to remain competitive

### Promotion

#### **Elements of a promotional plan**

- Personal selling
- Sales promotion
- Public relations
- Direct mail
- Trade fairs and exhibitions
- Advertising
- Sponsorship

#### **Promotion plan should:**

- Define key messages (selling points) for each target audience
- Identify promotional materials and activities that will deliver the message
- Map out time line for producing and delivering materials
- Reinforce organization's brand identity

### Publicity

#### **Press release mailings**

- Press releases tailored to each media outlet
- Up-to-date media mailing list
- Press kit available online and in press room
- Follow-up mailings with phone call to contacts

#### **Press room on-site**

- Skirted tables and chairs
- Computers with internet access
- Telephones and jacks for laptops
- Press table with bios, photos, speeches, press kits, exhibitor press releases
- Refreshments supplied throughout event

#### **Printed Materials**

- Budget sensibly
- Include all printed material
- Solicit print bids

#### **Marketing collateral distributed before and during event**

- Letters, postcards, flyers and brochures
- Pre-registration and housing forms
- On-site registration forms
- Invitations to VIPs, private receptions, etc.
- Official programs of the event
- Badge holders and paper stock
- Evaluation forms
- Session handouts/proceedings
- Tickets
- Newsletters or newspapers to be produced at the event
- Registration lists

## **CHECKLIST: MARKETING, PROMOTION AND PUBLICITY *(continued)***

### **Internet Promotions**

#### ***Using websites effectively***

- Work with a pro
- Weave your section in seamlessly
- Keep it simple
- Tie in to event collateral
- Make navigation easy
- Be consistent in details
- Reward visitors with added value
- Update information regularly
- Encourage visitors to register
- Add bells and whistles for a reason
- Promote future events
- Copyrights, disclaimers and disclosure

#### ***Place banner advertising***

- Industry publications
- Trade associations or affiliated organizations
- Vertical portals that serve industry
- Convention and visitors bureau for event destination
- Event sites that list events, conventions and exhibitions
- LinkExchange Banner Network

#### ***Distribute email newsletter***

- Event information
- Show daily news
- Post-show reports
- Industry news
- Educational articles

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# CHECKLIST: AUDIOVISUAL REQUIREMENTS

## Site-Selection Criteria for A/V

### General questions

- Does the facility have a contract with a particular supplier?
- If so, what is the policy on outside vendors in the facility?
- What are the union jurisdictions?
- Are there charges for set-up and move out days?
- If a 24-hour hold is made on a room, is there an extra charge?
- Who locks and unlocks rooms? When? Is there full-time security?
- Is security in-house or contract? If contract, do you have the option to contract direct?
- Is there an engineer on staff, or is engineering contracted?
- When are rooms normally set up?
- Is there an accessible dock and elevator for contractors bringing in equipment and staging?
- How big are they? How do you schedule them for move-in and move-out?
- What is normally provided by the facility as part of the room (microphones, house sound system, flip charts, lecterns, etc.)?

### Room inspection

- What is the true ceiling clearance?
- What is the lowest ceiling point in the room?
- Are there obstructions (low-hanging chandeliers, columns)?
- What about any light sources or reflective surfaces (windows, mirrors)?
- Is there a house phone in the room? Can it be disconnected?
- How soundproof are portable walls?
- What will be going on in adjacent rooms?
- Where are the entrances and exits? What can be blocked by AV stands, stages or seating?

### Room inspection (continued)

- Do doors squeak? Close completely? Automatically lock?
- What is the true meeting space?
- Is there room for A/V setup and a control console?
- Does the room have a permanent stage? Stage lighting? Sound system?

### Sound system

- Who handles the sound in the facility? Is there a patch fee?
- Is there a good-quality sound system in the room? (Ask for a demonstration.)
- Are portable sound systems available (sound lecterns, etc.)?
- Can the rooms be patched for audio recording from a central location?

### Lighting

- Where are the house lighting controls? Can they be remote controlled?
- Can room lighting be divided into sections?
- Are follow spotlights available? At what cost?
- If stage lighting is to be hung from the ceiling, what are the restrictions? Where can it be hung? Who can do the work? Is there a reflected ceiling plan available?
- Are there man lifts, scissor lifts or basket lifts available from the facility? If so, at what cost? If not, from whom?

### Electrical

- Where does the electrical service originate in the room?
- Who provides hookup service?
- Do they also provide distribution of the service?
- What is the cost for hookup and use?

## CHECKLIST: AUDIOVISUAL REQUIREMENTS *(continued)*

### Site-Selection Criteria for A/V *(continued)*

#### Communications and computers

- What type of telephone, data and high-speed transmission service is available in the facility (analog phone line, digital phone line, ISDN lines, T1 line, other)? At what cost?
- Are two-way radios available? Are there places where these do not function?
- Does the facility have a vendor for computer rentals? If so, compare to that of a contract vendor.
- Is there a business center capable of helping with computer presentations?

### A/V Requirements for Presentations

#### Microphones

- Does speaker prefer handheld or lavalier (lapel) microphone?
- Does speaker prefer wireless or wired microphone?
- Is a mixer required? If so, how many?
  - One wired podium mic (handheld) or wired lavalier mic does not require a mixer.
  - More than one mic of any kind usually requires a mixer.
  - Standard mixers have four channels and can handle four microphones. If a speaker wants five to eight microphones, two standard mixers or one eight-channel mixer will be required.
- Is a sound technician needed? (For one to four mics, a sound technician is not normally required. For more than four mics, a sound technician is always required.)
- Is the speaker providing the mic? Patch fee may apply.
- Will other input devices be used (videotape players, audio cassette players, etc.)? If so, how many? Will additional mixers be required?

#### Video cassette recorders (VCRs)

- What size and format (VHS, VHS-C, Super VHS, U-format, Hi 8, Betacam, Betacam SP)?
- If presenter is from outside the United States, what is the video standard (NTSC, PAL, SECAM)?

#### Computer interface

- What make and model computer will be used?
- What is the monitor scan rate (VGA, SVGA, XGA or higher)?
- How many computers? Provided or rented? Are power cables, phone cable extensions, etc. included?
- Does the speaker need an Internet connection? If so, what speed (modem, ISDN, T-1)?
- If using a laptop, is power supply or adapter needed?
- Is an LCD projector needed?

#### Cassette decks

- Is it for playback only or for recording purposes? Playback to large audiences requires a four-channel mixer to patch into sound system.

## CHECKLIST: AUDIOVISUAL REQUIREMENTS *(continued)*

### **General A/V Requirements**

- Have equipment set one hour before meeting time.
- If the speaker wants equipment set up the night before a meeting (for rehearsal purposes, etc.), a one-day rental fee may be applied for that night.
- If technical specialists are required, allow for four-hour minimum and overtime rate after 5:00 p.m. (17:00) and on weekends.
- Communicate A/V requirements to A/V contractor as soon as possible. Some equipment may need to be special ordered.

### **Screen height**

- The bottom of the screen should be at least four feet (1.2 meters) from the floor. To determine the tallest screen usable in a meeting room, subtract four feet from the unobstructed height of the room.

### **Screen placement for optimum audience viewing**

- For best viewing, the first row of seats should be no closer than twice the height of the screen. The last row of seats should be no farther away than eight times the height of the screen

### **Projection Screens**

Suggested audience sizes for tripod screens (front projection only)

<b>Screen Size</b>	<b>Audience Size</b>
60"x60"	Up to 25
70"x70"	25-50
84"x84"	50-100
96"x96"	100-150

Suggested audience sizes for rectangular fast-fold screens (front or rear projection)

<b>Screen Size</b>	<b>Audience Size</b>
6'x8'	Up to 150
7.5'x10'	150-200
9'x12'	200-300
10.5'x14'	300-500
12'x16'	500-750
15'x20'	750-1500

As audience increases, more screens will be needed.

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## CHECKLIST: FOOD AND BEVERAGE

### Planning

#### **Records of previous functions**

- Projected versus actual attendance
- Number, type of functions, timing
- Menus, including special dietary or religious restrictions
- Number, type of drinks served per person at meals
- Number, type of drinks served per person at receptions
- Projected versus actual budgets
- Guarantee, deposits
- Size and set-ups of rooms
- Size and number of tables
- Type of linens
- Giveaway
- Staffing
- Amount of load-in/ load-out time
- Amount of room set-up time
- Gratuity policy
- Overset policy
- Tax: policy for gratuity/service charge
- Room-service patterns
  - Hotel outlet
- Table numbers/stanchions

#### **Schedule for each function**

- Is function primarily business, social, hospitality?
- Are musicians, entertainers, emcee, ushers needed?
- Will timing conflict or overlap with other events at the facility?
- Is time allowed for movement of attendees?
- What other groups are in-house?
- What is the expected attendance at each function?
- Who will handle which responsibilities?

#### **Establish a working budget**

- Room rental fees
- Food-and-beverage costs
- Services/labor costs
- Gratuities/service charges
- Overtime charges
- Surcharges
- Specialty linens
- Centerpieces
- Extra tips
- Entertainment fees/riders
- Union requirements
- Maintenance
- Taxes
- Special equipment
- Souvenirs, awards, gifts
- Decorations
- Material handling
- Two-way radios
- Computers, printer, fax:
- High-speed lines
- Specialty linens
- Food carts
- Additional wait staff
- Phones
- Audiovisual
- Printed materials, invitations, signage, table numbers
- Facility/valet parking
- Staffing

#### **Inquire about local laws and regulations**

- Union regulations on minimum number of waiters, musicians, bartenders
- Overtime
- Facility set-up staff
- Liquor laws
- Facility policies on outside liquor supplies

## CHECKLIST: FOOD AND BEVERAGE *(continued)*

### Planning *(continued)*

#### ***Inquire about local laws and regulations*** ***(continued)***

- Lounge, room-service hours and regulations
- Material handling
- Tent inspections
- Noise abatement
- Fire codes
- Building codes
- Noise abatement
- Balloons
- Fireworks
- Medical services

#### ***Inquire about special services***

- Elevators/escalators
- Transportation
- Traffic control
- Garage, valet parking service
- Telephone, message service
- Security
- Coat check
- Operations center
- High-speed lines/Wi-Fi
- Florist
- Medical

#### ***Contract for any additional services***

- Audiovisual
- Photographer, videographic
- Entertainment
- Lighting
- Florists
- Security guards
- Decorator-designer
- Material handling
- Portable restrooms
- Shippers
- Producer/staging director
- Audiovisual
- Transportation

#### ***Contract for any additional services(continued)***

- Media coverage
- Religious
- Host, hostess
- Souvenir supplier
- Valet parking

#### ***Negotiating cost***

- Negotiate prices based on numbers of sleeping, meeting rooms, exhibit space booked
- When negotiating food costs more than six months out, agree on a percentage to pay above present prices
- Decide how you want to be charged: signed guarantee, number of meal tickets collected, quantities consumed
- Set cut-off date
- Determine percentage above guarantee facility will supply, and incremental price, if any, for latecomers
- Negotiate beverages prices
- Determine minimum number of servers and bartenders for each function, and charges for them (industry standard 1:20)
- Clarify the basis for federal, state and local tax charges
- Inquire about any other surcharges: ice, corkage, set-ups, minimum labor fees for small groups
- Plan menus accordingly
- Specify all agreements in contract

## CHECKLIST: FOOD AND BEVERAGE *(continued)*

### Function Rooms

#### *Inspect possible sites for:*

- Sufficient space
- Adequate electrical outlets, voltage capabilities
- Proper acoustics, lighting, ventilation
- Columns, other obstructions
- Accessibility of exits, restrooms, dressing rooms, telephones
- ADA compliance
- Door clearance
- Elevator size, weight capacity
- High-speed lines
- Airwalls
- Chandeliers
- Ceiling height
- Green room
- Restrooms
- Size of hotel sign on lectern to cover

### Room Set-ups

#### *Work with a scaled diagram and consider:*

- Type of activities, purpose, desired atmosphere
- Expected attendance
- Number, dimensions of tables
- Type of food service
- Best table placement
- Decor, entertainment
- Ingress, egress
- Flow
- Signage placement
- Registration
- Coat check

#### *Location and dimensions*

- Stage
- Platform
- Dance floor
- Proscenium height
- Runways

#### *Location and dimensions (continued)*

- Ramps
- Risers
- Access aisles
- Floor covering
- Registration
- Seating chart
- Emergency exits

#### *Possible items for head tables*

- Platform
- Additional two feet for lectern
- Special chairs
- Place cards
- Special services, decorations, beverages, gifts
- Spouse, guest seating
- Ramp for handicapped access
- Step railings
- AIV equipment
- Awards table
- Stanchions
- Table mics
- Carpet riser
- Emergency exit instructions

#### *Decorations*

- Meeting theme
- Centerpieces
- Decor, props

### Pre-Event Arrangements

#### *Staff assignments*

- Ticket collectors, cashiers, ushers, escorts for special guests
- Coordinate attendance
- Inventory liquor before and after function
- Make and/or distribute posters, signage, seating lists, place cards, menus, programs, gifts

## CHECKLIST: FOOD AND BEVERAGE *(continued)*

### **Pre-Event Arrangements *(continued)***

- Attend to entertainers' needs
- Water for speakers
- Operate audiovisual equipment
- Special meals
- Check-in, distribute badges
- Giveaways
- Emergency spokesperson

### **Instruct staff and attendees on:**

- Seating procedures
- Informing attendees of location changes
- Assignments at alternate locations
- Handling admission, tickets, cash collection
- Special meal requests
- Parking location/ discounts
- Attire
- Giveaways
- Alcohol policy for staff
- Radio protocol
- Transportation
- Security
- Emergency procedures

### **Check periodically that all instructions are being carried out**

- Room set-ups
- Ticket sales
- Cocktails
- When doors open
- Seating of head-table guests
- Special opening ceremonies
- Food service
- Tables cleared
- Speakers

### **Check periodically that all instructions are being carried out *(continued)***

- Registration
- Music, entertainment, dancing
- Microphone for speakers
- Awards displayed
- Water for speakers (no ice)
- Special meals
- Wine service

### **Post-Function**

- Distribute tips (if gratuity is not included on catering bill or service warrants additional reward)
- Teardown
- Arrange for cleanup, including pick up any extra meeting or convention materials
- Supervise inventory, return of unused beverages, mixes, food
- Pack boxes, ship, return radios
- Review billing, accounting, checkout procedures with facility staff

## CHECKLIST: RESERVATIONS AND HOUSING

### **Specific number of sleeping rooms committed**

- Singles (one bed/one or two persons)
- Doubles (two beds/one to four persons)
- Suites (one or two bedrooms)

### **Schedule**

- Cut-off date (reservation review date)
- Room-block review session(s)

### **Choose reservation method**

- Individual guest reservations
- Staff
- Housing bureau
- Other

### **Establish:**

- Person in charge of monitoring block at the facility
- Fees for services
- Reporting system for reservations, cancellations and no-shows
- Policies and priorities for room assignments
- Deposit requirements
- Record-keeping systems

### **Arrange for reservation forms and confirmations**

- Supplied by
- Sent by
- Sent schedule
- Returned to
- Copies sent to
- Costs

### **Reserve rooms (possibly complimentary or reduced-rate) for:**

- Staff
- Officers
- Speakers
- Others

### **Credit cards honored by hotel**

- American Express
- Visa
- MasterCard
- Diners Club
- Discover
- Not accepting bank debit card

### **Inquire about extra hotel staff during peak check-in checkout time**

- Front desk
- Maids
- Bellmen
- Restaurant personnel
- Valet parking attendants
- Other

### **Remember to:**

- Review needs of people with disabilities
- Reserve block of rooms for emergencies
- Set up procedures for late check-ins, early departures and "walked" attendees
- Publicize reservation information in association publications and event promotional materials

Excerpt from the Convention Industry Council's Manual, 8th Edition study guide for the Certified Meeting Professional program. Visit [www.conventionindustry.org](http://www.conventionindustry.org) for more information on the CMP program and purchase of full study guide.

## CHECKLIST: FUNCTION ROOM SET-UP

### Booking Meeting Space

#### *Determine whether charges include:*

- Seating
- Tables
- Risers
- Head tables
- Audiovisual (A/V) equipment
- Special power
- Special set-ups
- Set-up labor
- A/V labor
- Electricians
- Meeting-room rental
- Water
- Other

#### *Negotiate charges based on your group's:*

- Number of sleeping rooms
- Projected food and beverage expenditures
- Repeat business potential
- Exhibit space usage (a plus at a convention center; a minus at a hotel)

#### *Determine the basis for booking meeting space*

- 24-hour
- Hourly
- Day/evening

#### *Draw up tentative and final programs, including:*

- List of function rooms with times and dates
- Set-ups for each function - supply diagrams
- Rooms to be rearranged
- Estimated set-up and tear-down times

#### *Sign a written agreement*

- Specify function rooms to be used, or alternate arrangements
- Establish and abide by release elates

## CHECKLIST: FUNCTION ROOM SET-UP *(continued)*

### Selecting Function Rooms

#### **Study the physical aspects, including:**

- Attendee comfort
- Environment that matches goals of meeting
- A/V feasibility
- Unobstructed sight lines (columns, chandeliers, etc.)
- Speaker focus
- Accommodations for people with disabilities
- Traffic flow
- Restroom accessibility
- External noise
- Food and beverage service, convenience
- Availability of floor plans with dimensions

#### **Focus on the condition of the rooms**

- Cleanliness
- Furnishings
- Ventilation
- Lighting (on audience and on presenter)
- Power requirements
- Acoustics
- Accessibility
- Obstructions
- Soundproofing

#### **Plan for contingencies**

- Concurrent groups
- Change in your group's size
- Availability of larger and smaller rooms (conditions, charges)
- Facility renovations
- Weather conditions (tent, canopies)
- Feasibility of temporary structures

#### **Consider pre- and post-event space requirements**

- Additional meetings
- Office space
- Equipment and supplies storage space
- Other

### Set-up Configurations

- Choose configurations for each function
- Sketch set-ups on scaled diagrams and provide copies to facility

#### **Do a pre-function check of:**

- Lighting and lighting controls
- Ventilation
- Facilities
- Equipment
- Services
- Staff, crews
- Cleanliness
- Adequate signage
- Fire exits

### Equipment Inventory

#### **List requirements, including:**

- Chairs (stack, swivel, upholstered, armchairs)
- Tables
  - Half-rounds - 30 or 60 inch (76 or 152 centimeter)
  - Quarter-rounds
  - Rectangles - six and eight foot (1.8 and 2.4 Meter) long; 18 and 30 inch (46-and 76 centimeter) wide
  - Rounds - 60, 66 and 72 inch (152, 168 and 183 centimeter)
- Stage (permanent, temporary)
- Guard rails, draperies, carpeting
- Lighting (regular, spotlights, controls)
- Lectern
- Podium
- Platforms
  - Six, 12, 16, 24 or 32 inches (15, 30, 41, 61 or 81 centimeters) high
  - Four by eight foot (1.2 by 2.4 meter) or six by eight foot (1.8 by 2.4 meter)

## CHECKLIST: FUNCTION ROOM SET-UP *(continued)*

### Equipment Inventory

#### **List requirements, including:**

- Ramp to stage
- Public address system (mixer, operator)
- NY equipment (see Chapter 29)
- Electricity (AC-DC current, capacities, outlet locations)
- Extension cords
- Blackboards, bulletin boards, easels
- Supplies (name cards, note pads, pencils, water pitchers, glasses, flags, signs, banners, wastebaskets, table coverings)

#### **Inventory facilities equipment, labor and supplies**

- Supplement with outside suppliers, if necessary
- Determine all charges
- Inquire about union regulations

### **Services, policies checklist**

- Telephone hookup
- Data ports
- High-speed phone lines
- Sign posting policy
- Staff management schedules
- Beepers, walkie-talkies
- Facility personnel responsibilities, phone extensions
- Availability of temporary secretarial service
- In-house NY service
- Rental availability of office equipment (computers, furniture)

## CHECKLIST: SHIPPING

### **Schedule**

- Pick-up date
- Ship date
- Targeted delivery date
- Move-in date (if different from delivery date)
- Return ship date
- Return delivery date

### **Choose best shipping method**

- Parcel post
- Air freight (UPS, FedEx, etc.)
- Common carrier
- Van line
- International freight forwarder

### **Packing list** Sequential item number (lot labeling)

- How shipped/carrier
- Date shipped
- Air waybill and/or pro number
- Date received
- Contents
- Value
- Copy all parties

### **Find out from facility:**

- Who receives shipments
- Where stored
- Special labeling instructions
- Liability policies
- Weight and size maximums
- Material handling policy and rates
- Billing

### **Instruct staff on:**

- Proper labeling
- Packaging
- Shipment schedules
- Repacking procedures

### **Insurance information**

- Amount
- Type (damage, loss, theft)
- Policy numbers
- Receipts
- Contact

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## CHECKLIST: SPECIAL PROGRAMS AND ENTERTAINMENT

### ***Guest program planning considerations***

- Guest program history
- Guest program budget
- Guest demographics
- Guest program survey
- Meeting schedule
- Social program schedule

### ***Guest programs***

- List of available options
- Dates and time of activities
- Detailed description of program
- Appropriate attire
- Food and beverage information
- Guests with special needs
- Per-person costs
- What the program includes for the cost
- Minimum number needed to confirm the program
- Cancellation policy
- Cut-off dates for registration
- Cut-off dates for cancellation
- On-site program registration availability, location or registration desk
- Childcare availability/options

### ***Special events and entertainment***

- Event/program objectives
- History
- Program schedule
- Space and venue requirements
- Budget
- Transportation
- Food and beverage
- Special services
- Décor
- Signage
- Site plan
- Audiovisual
- Entertainment
- Staffing

### ***Special events and entertainment (continued)***

- Marketing
- Contracts
- Permits and licenses
- Power requirements
- Equipment rentals
- Insurance
- Security
- Communications
- Parking
- Contingency plan
- Risk management Evaluation

### ***Book entertainment***

- Booking agent
- Contracts
- Budget
- Technical requirements
- Equipment requirements
- Unusual items required
- Set-up charges
- Travel and accommodations
- Dressing rooms
- Set-up schedule
- Rehearsals
- Script for introductions and announcements
- Guidelines for audience dialogue
- Taboo areas for comedy
- Preview the act

### ***Children's programs***

- Budget
- Outsourcing program
- Risk management, liabilities, local codes
- Meeting benefit or disruption
- Defining separate age groups
- Children with special needs
- Program design
- Design of program

## **CHECKLIST:** **SPECIAL PROGRAMS AND ENTERTAINMENT** *(continued)*

### ***Children's programs (continued)***

- Number of adult chaperones per number of children
- Per-person cost
- Minimum number of children to confirm the program
- Cancellation policies
- Appropriate clothing
- Food and beverage
- Cut-off dates for registration
- On-site program registration availability
- Chaperone ratio

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## CHECKLIST: TRANSPORTATION

### Air Transportation

#### Choose to work with:

- Travel agency
- Airline(s)
- Official carrier

#### Provide the airline with:

- Event dates (arrival/departure, destinations)
- Anticipated dates of travel (include time for pre- and post-travel)
- Group name
- Attendee demographic information
- Estimated attendance
- Travel history
- Hotels
- Visibility in event promotional materials

#### Coordination tools from airline or travel agency

- Arrival and departure manifest
- Rental car usage report
- Hotel manifest of attendees

#### Airline services

- Discounts
- Staff travel
- Air cargo
- Arrival/departure information
- Cost analysis
- Promotional assistance
- Advertising
- Group travel or meeting services desk

### Ground Transportation

#### Airport meet and greet includes:

- Greeting guests at baggage claim
- Signage
- Luggage handling
- Escort to motor coaches
- Motor coaches

#### For hotel shuttles provide:

- Times needed
- Hotels to be included in shuttle route

#### For hotel shuttles provide (continued):

- Frequency of shuttle
- Peak and off-peak times
- Other conference activities
- Signage requirements
- Transportation staff expectations
- Drop-off and pick-up locations

#### Choose a DMC or transportation company based on:

- Costs (including willingness to negotiate; also determine if gratuities are included for motor coaches drivers, tour guides, porters)
- Reputation (service performance record, number of years in business)
- Number of full-time staff and number that will operate your transportation move and their experience
- References (other planners, vendors)
- Number, size, condition and availability of vehicles
- Responsiveness to calls and requests
- Insurance coverage
- Special services (e.g., VIP transfers)

#### Ask the DMC or transportation company:

- What are minimum rental periods for vehicles?
- If a program runs longer than expected, will motor coaches still be available? What is the additional cost per hour, plus staff?
- How are motor coaches dispatched? Is there a dispatcher on-site?
- Does the company own and operate its own equipment or will it be subcontracting?
- Can the vehicles accommodate people with disabilities? If not, what other options are available?
- What is the condition of the motor coaches that will be used? Are they equipped with microphones and do they work?

## CHECKLIST: TRANSPORTATION *(continued)*

### Ground Transportation *(continued)*

#### **Ask the DMC or transportation company *(continued)*:**

- Are backup vehicles available in case of breakdown or overflow?
- Are the drivers on radio?
- Are motor coaches air-conditioned?
- Are motor coaches equipped with restrooms and VCRs/DVDs?
- How far from your pick-up point are vehicles located? If necessary, can motor coaches be parked legally at pick-up and drop-off points?
- What hours will motor coaches be in use?
- What route will the motor coaches follow?
- Are there alternative routes for busy times or emergencies?
- What are the normal traffic and road conditions on all scheduled (and alternate) routes during operating hours?
- Request a Certificate of Insurance
- Will equipment remain on-site during the program?
- Are the drivers local?
- Request a schedule of services or trip sheet from the DMC or transportation company
- What time do motor coaches spot before events?
- Is the transportation staff identifiable through uniforms and name badges?
- Do they provide custom signs on the transportation equipment with the group's name?
- Will the time of my transfer affect the number of vehicles needed?
- How will the weather affect my transfer?

### **Charter or shuttle motor coaches**

- Pick-up points and drop-off points
- Best route and schedule
- Hours of operation
- Where information should be posted/published
- Transportation staff
- Signage

### **For VIPs**

- Arrival and departure information
- Availability of airport VIP lounge
- Customs and immigration
- Appropriate airport location to meet VIP
- Parking for incoming flights
- Drop-off points for departing VIPs
- Route and travel times to and from the airport
- Signage to identify arriving passengers
- Baggage and gratuities

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## CHECKLIST: VIRTUAL CONFERENCING

### **Preparing for an event**

- Define goals and objectives for participants
- Define program content to meet objectives
- Announce conference early and send reminders
- Make registration easy (online, email, fax or phone)
- Set agenda and distribute before meeting
- Define times and responsibilities for participants
- Create and distribute evaluation instrument
- Plan budget and watch expenses

### **Site selection and set-up**

- Select remote facilities
- Confirm videoconference room capacities
- Confirm compatibility of technology between remote sites
- Note system capabilities
  - Data transmission
  - Document sharing
  - Application sharing
  - White-boarding
  - Polling
  - Text messaging
- Identify backup facilities
- If a multipoint bridge is required, reserve bridge in advance
- Have a trained facilitator at each site
- Provide all facilitators with copy of confirmation documents from videoconference provider or bridge service
- Distribute all phone and fax numbers for each location
- Review media presentations for content and clarity
- Work with speakers on videoconference presentation skills
- Test and retest
- Have contingency plans if technology fails

### **On the day of the event**

- Arrive early and check all equipment and connections
- Distribute any materials
- Have each site call in and be online 15-30 minutes before start time
- Test transmission from each site, including all cameras, audio feeds and presentation materials
- Conduct a briefing for participants at each site before the event
- For a large group, have a lectern or assigned seat for speakers
- When the program begins, have facilitators introduce each site and participants

### **Ground rules should include:**

- Speaking protocols – how to be recognized or respond
- Mechanics – microphone use, adjusting cameras
- Etiquette – don't shuffle papers, tap pencils or engage in side conversations
- If your site does not "have the floor," mute the audio feed

## CHECKLIST: VIRTUAL CONFERENCING *(continued)*

### **Tips for presenters**

- Accommodate horizontal video screen format using landscape mode for slides and graphics
- Use color in graphics and videos if they add to the presentation, as well as music or other sound enhancements
- Have contrast between type and background colors
- Type should be bold and at least 14 points in height
- Don't let graphics get too busy. Use simple bar and pie charts
- Don't have more than seven lines of type on a single slide
- Avoid dressing in white, busy patterns or tight stripes and wearing flashy jewelry
- Wear medium blue or pastel shirt or blouse and medium-to-dark jacket.

### **Choosing a webcasting company**

- Is the service provider a turnkey operation?
- If not, who has it partnered with for specific services (camera crew, encoding, web design, etc.)?
- Where will the webcast be produced (on location, at a production studio)?
- Where will the webcast be hosted (your website or service provider's website)?
- Is there marketing support to inform viewers of the webcast, its delivery method and how to use it?
- For an archived event, what is the turn-around time for putting a presentation up on the web from the time it was taped live?
- What are the service provider's production capabilities?
- Will the company help write the scripts, provide cue cards and Teleprompters?
- Can the company develop the web page for the webcast to be viewed?
- Can the company support speaker presentation visuals in the webcast (PowerPoint presentation, video, slides, etc.)?
- Ask for references and check them.

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# CONFERENCE AND EVENT HANDBOOK

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## Phase Three: Execute Event

Before the event officially launches, hold a final meeting to review all the checklists with your team, reconfirm each individual's responsibilities, and restate troubleshooting procedures so that everyone is clear on how to handle any crisis that arises. Further, take this opportunity to restate the reasons the event is taking place: the purpose of the conference, the goals you are trying to achieve, and the expectations you hope to fulfill for those attending. Despite the looming task swirling around, this meeting will help keep everyone focused on the overall vision and committed to the event's success. (LoCicero, 2008:148)

Even the best, most thorough planner will have some problem or issue to deal with onsite. What happens if a speaker changes his or her mind at the last minute and demands a piece of equipment the a/v doesn't have? What if your keynote speaker gets stuck in traffic or an attendee complains about his room and wants a refund? What if your shipping company loses the shipment with your registration materials or more people than you guaranteed show up for a meal function? What if someone becomes ill, requiring medical attention?

Once onsite, you have to make decisions—fast. And at this point, almost all problems have an effect on the facility and its staff, not to mention your staff, too. The key here is to anticipate what could happen and, when it does, discuss the problem with your onsite manager and others who are involved, they really do want your meeting to be a success, and with your help, will do whatever they can to make it work. Working with composed, committed, and creative people is one of the greatest things about this business. (Craven, 2006:285)

## Checklist to Execute Event

<u>Page</u>	<u>Checklist Name</u>	<u>Reason For Using This Checklist</u>
96	Pre- and Post-Event Meetings	A critical part of ensuring the success of an event is to provide timely and thorough information to each person involved in its execution, especially to personnel at the facility where the event will be held. The conference planner can use this checklist to guide discussions with the host facility before and after the event.

## CHECKLIST: PRE- AND POST-EVENT MEETINGS

### **Set up a schedule of on-site planning**

#### **sessions involving:**

- Convention services manager (CSM)
- Site management
- Outside suppliers
- Convention and visitors bureau representative
- Operations department representatives, such as reservations manager, front desk manager, banquet manager, head house man, audiovisual (A/V) representative
- Planner
- Association/organization staff members

### **Well in advance of the event, send function**

#### **set-up orders to:**

- CSM for distribution to appropriate facility personnel
- Appropriate outside suppliers

### **Include in function set-up orders:**

- Group name and program name
- Day and date of event
- Name and number of each function
- Meeting room name (and floor number, if applicable)
- Time the room should be set up
- Time the function begins and ends
- Expected attendance
- Number of speakers
- Head table set-up
- Staging
- A/V requirements
- Special requirements, i.e., computer set-up, floral arrangements, special table linens or colors, signage, event posted on the reader board (yes or no)
- Food and beverage requirements, to include menus
- Scheduled breaks for refreshing the room  
The point person in charge of the event

### **Review details regarding:**

- Menus and food functions
- Beverages
- Entertainment
- A/V equipment
- Engineering/special utilities
- Reservations
- Registration
- Cashiers
- Transportation
- Parking
- Receiving/shipping
- Telephone set-ups
- Housekeeping
- Pre-event programs
- Post-event programs
- Special tours
- Recreational activities
- Security
- Accounting procedures

### **Review exhibit event description**

- Number of exhibitors (domestic and international)
- Estimated square footage
- Audiovisual requirements
- Special features
- Registration
- Offices
- Decorator/general service contractor
- Material handling arrangements
- Signage
- Security
- Local fire and safety codes

### **Review exhibit promotion schedule**

- Show kit registration materials
- Number of advance orders
- Total orders last show

## **CHECKLIST: PRE- AND POST-EVENT MEETINGS *(continued)***

### ***Review exhibit promotion schedule (continued)***

- Time frame of floor marking
- Freight instructions
- Start and end time of exhibit move-in
- Start and end time of exhibitor move-in
- Closed days
- Final cleanup, carpet installation
- Plumbing, telecommunications, electrical services
- Service desk hours
- Start and end time of exhibitor move-out
- Start and end time of exhibit move-out

### ***Review event hours, meeting schedule***

- Date of first meeting, date and time of last meeting
  - VIP speakers
- Review light, power and escalator schedules
- Show areas
- Registration areas
- Office areas
- Special 24-hour power requirements

### ***Review emergency procedures***

- 911 calls
- Medical personnel- On-call doctor, nurse and paramedics (How far away are they?)
- Special security or police detail
- Political concerns
- Weather considerations specific to area (snow, hurricane, tornado, flood, fire, earthquake)
- Manager-an-duty coverage in evening and early morning hours

### ***Review facility services***

- Shipping and receiving services/hours of operation
- Luggage storage location
- Housekeeping schedule, turndown service

### ***Review facility services (continued)***

- Coat check location/hours of operation
- Mail procedures
- In-room safes, safe deposit boxes
- Business center services/hours of operation
- Restaurant outlets - menu design, hours of operation, dress code
- Fitness center, health club and recreational activity hours of operation
- Environmental/humanitarian policies, e.g., recycling, food bank participation, etc. (local Good Samaritan laws)

### ***Review transportation for attendees***

- Airport transportation options
- Taxicabs -loading/ unloading area, availability and costs
- Shuttle buses - loading/unloading area, schedule
- Shuttle bus staging area
- Parking lot hours, signage, costs
- Transportation for other groups at the facility that may affect the event

### ***Overall review***

- Obtain and review a copy of facility's resume about the event.
- Obtain and review a copy of the facility's banquet event orders
- Provide convention programs/ agendas to key facility personnel- i.e., switchboard, information desk, concierge, bell staff, housekeeping, recreational coordinators

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# CONFERENCE AND EVENT HANDBOOK

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## Phase Four: Close Event

An evaluation of a meeting or event helps determine whether the objectives of a meeting or event were met and to what degree. (Ramsborg, 2006: 692)

During the event, evaluate educational and general sessions immediately after they conclude. This allows data gathering while the session is fresh in the attendees' minds and could increase the number of completed surveys. If possible, position a staff member inside meeting rooms to collect the completed forms. (CIC: 36)

Evaluations are one of the last important meeting details to handle. Before you leave the facility, make sure you have collected all of your evaluations, especially if they were left in various locations. (Craven, 2006: 300)

Various techniques can be used to collect information for the purposes of evaluating your meeting. Consider the following options: evaluations, interviews, focus groups and observations.

Make sure receive final report from the facility. The report should include a recap of everything you contracted for (rooms, food and beverage, A/V, and so on) and final comments, if possible, about how the meeting attendees used the facilities. (Craven, 2006: 301)

## Checklist to Close Event

<u>Page</u>	<u>Checklist Name</u>	<u>Reason For Using This Checklist</u>
102	Surveys & Evaluations	A conference planner needs to evaluate the effectiveness of the event through evaluations/surveys. Evaluation can provide a record of an event's history, benchmark where it is at present and help plan how it should develop in the future.

## CHECKLIST: EVALUATIONS

### **Measuring Success**

- Evaluate to help record both successes and challenges
- Ongoing process, not just a routine at the end of an event

### **Who defines success?**

- Board of directors
- Conference planner
- Exhibitors
- Convention services manager
- Attendees
- Contracted service providers

### **What to evaluate**

- Conference program
- Exhibition
- Location
- Facility
- Services
- Other elements – entertainment, recreational activities, spouse and guest programs and social activities

### **When to evaluate?**

- Before the event conduct a needs assessment
- During the event evaluate educational and general sessions
- After the event evaluate long-term benefits of the event

### **Data types**

- Quantitative data – numerically compare data
- Qualitative data – participant observations

### **Common rating scales**

- Excellent, good, fair, poor
- Very likely, likely, somewhat likely, not very likely
- High, medium, low
- Very important, important, somewhat important, not very important
- Very useful, useful, somewhat useful, not very useful
- Strongly agree, agree, neither agree nor disagree, disagree, strongly disagree
- All the time, most of the time, some of the time, rarely, never
- Very interested, interested, somewhat interested, not at all interested

### **Survey design**

- Short and easy to complete
- Specific questions, each addressing a single topic
- Avoid jargon, abbreviations, and acronyms
- Place time-consuming questions at the end of survey
- Avoid asking for the respondent's name; make it optional
- Always thank respondents for their time and effort

### **Analyze the results**

- Use counts or determine averages
- Outsource to a professional survey company for credibility

# CONFERENCE AND EVENT HANDBOOK

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# Conference and Event Management

For State of Ohio Government Agencies



Project Management Course  
Ohio Department of Administrative Services  
Office of Learning and Professional Development

November 18, 2010

# Human Resource Management

## Project Sponsors

- Nelson Gonzalez and Marsha Stoops
- Office of Learning and Professional Development

## Project Manager

- Julie Darby-Martin
- Bureau of Workers' Compensation

## Project Team

- JADS - Just Another Darn Seminar
  - Julie Darby-Martin – Workers' Compensation
  - Aryca Waller – Department of Commerce
  - Deborah Chambers – Alcohol and Drug Addiction Services
  - Sandy Thatcher – Workers' Compensation

# Business Case

State agencies need to produce conferences and events



Employees have limited training and experience in event planning

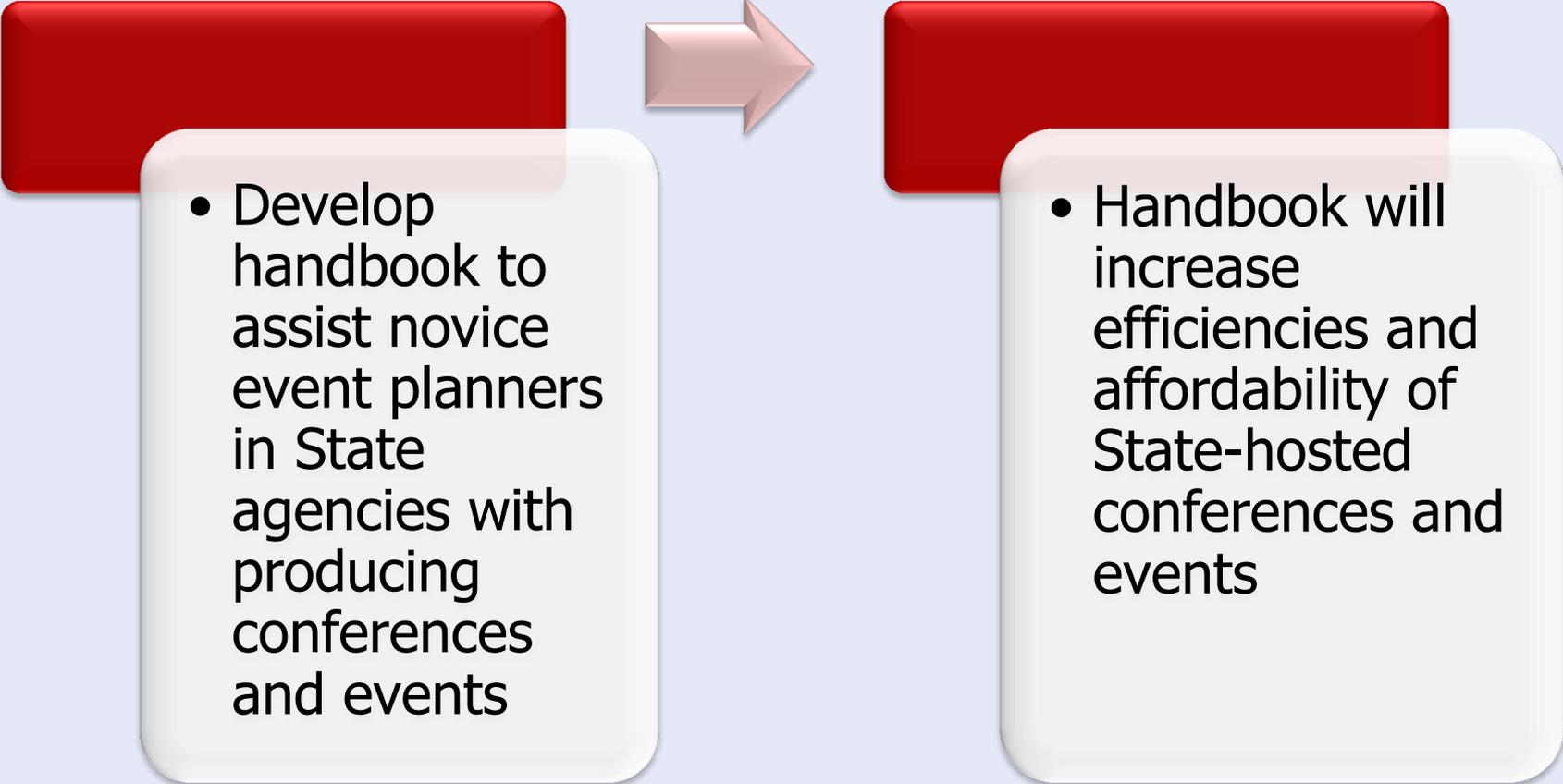


Employees have multiple duties; events are an "add on" duty



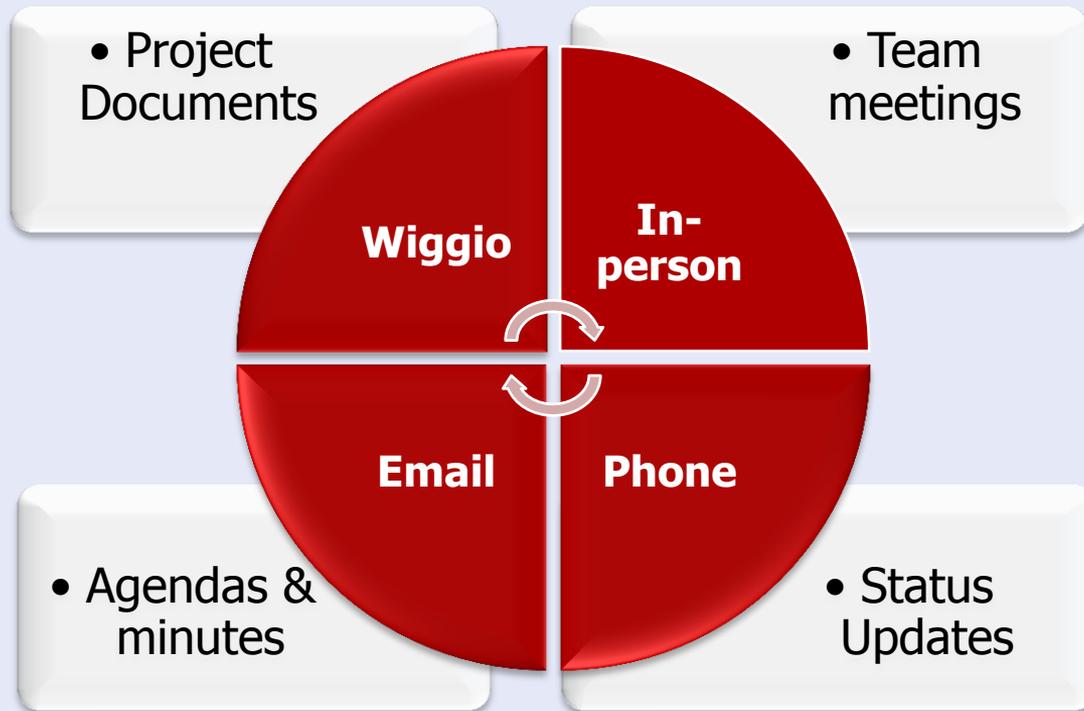
Employees have limited knowledge of event planning resources

# Project Objective

- 
- Develop handbook to assist novice event planners in State agencies with producing conferences and events

- Handbook will increase efficiencies and affordability of State-hosted conferences and events

# Communication Management



**Event**

**Stakeholders**

**Objective**

**Frequency**

**Mode**

# Project Scope Management

## In Scope Deliverables

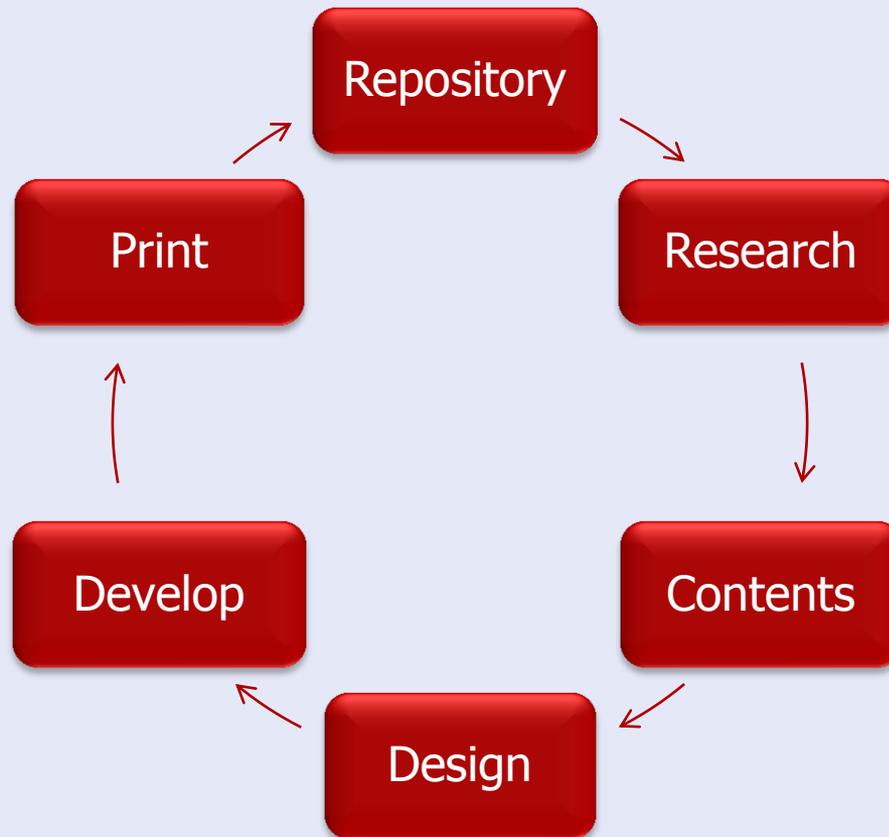
- Establish web-based repository for project documentation and communication
- Research and collect project info for developing a handbook
- Identify handbook contents; choose project title and components
- Design logo and format for handbook
- Create contents and input into handbook document
- Print handbook

# Project Scope Management

## Out of Scope

- Create web site and web-based handbook for conference and event management
- Handbook will not focus content on non-State political subdivisions needs
- Market handbook to DAS for use by State of Ohio agencies

# Project Time Management



Define Activities and Assign Resources by Expertise

# Work Breakdown Structure

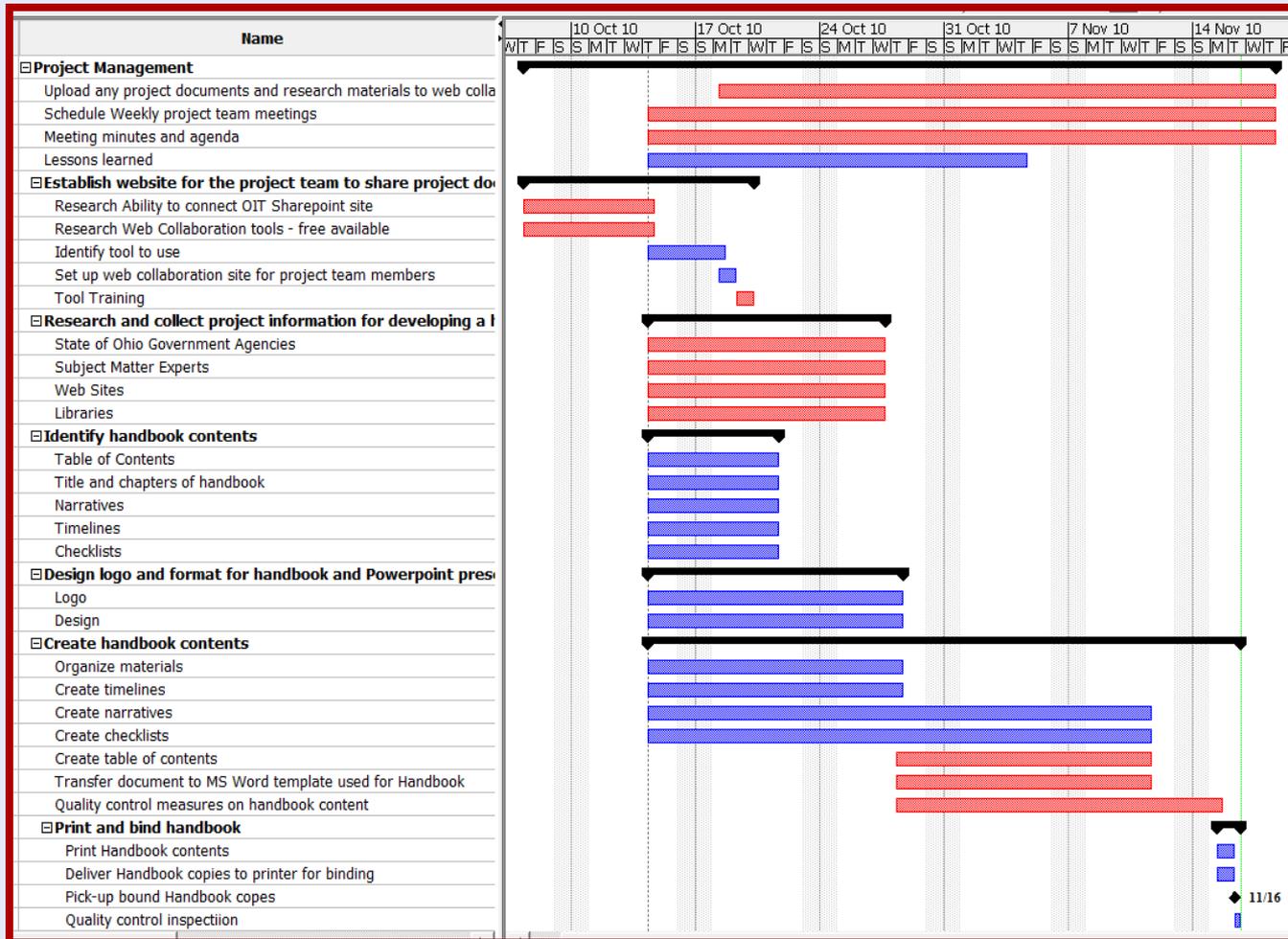


# Project Time Management



Primary Factors for  
Developing Project Schedule

# Project Time Management



# Project Cost Management

**Initial Estimated Budget** **\$9,264.00**

- Labor – 280 Hours x \$32.80/hr
- 60 CD-Ws, labels, and sleeves - \$80.00

**Actual Budget Cost** **\$13,088.10**

- Labor – 397 Hours x \$32.80/hr
- Print Binding for 10 Handbooks - \$66.50

**Actual Cost Variance** **(\$3,824.10)**

- Labor – 117 Hours x \$32.80/hr
- Print Binding for 10 Handbooks – (\$13.50)

# Quality Management Plan

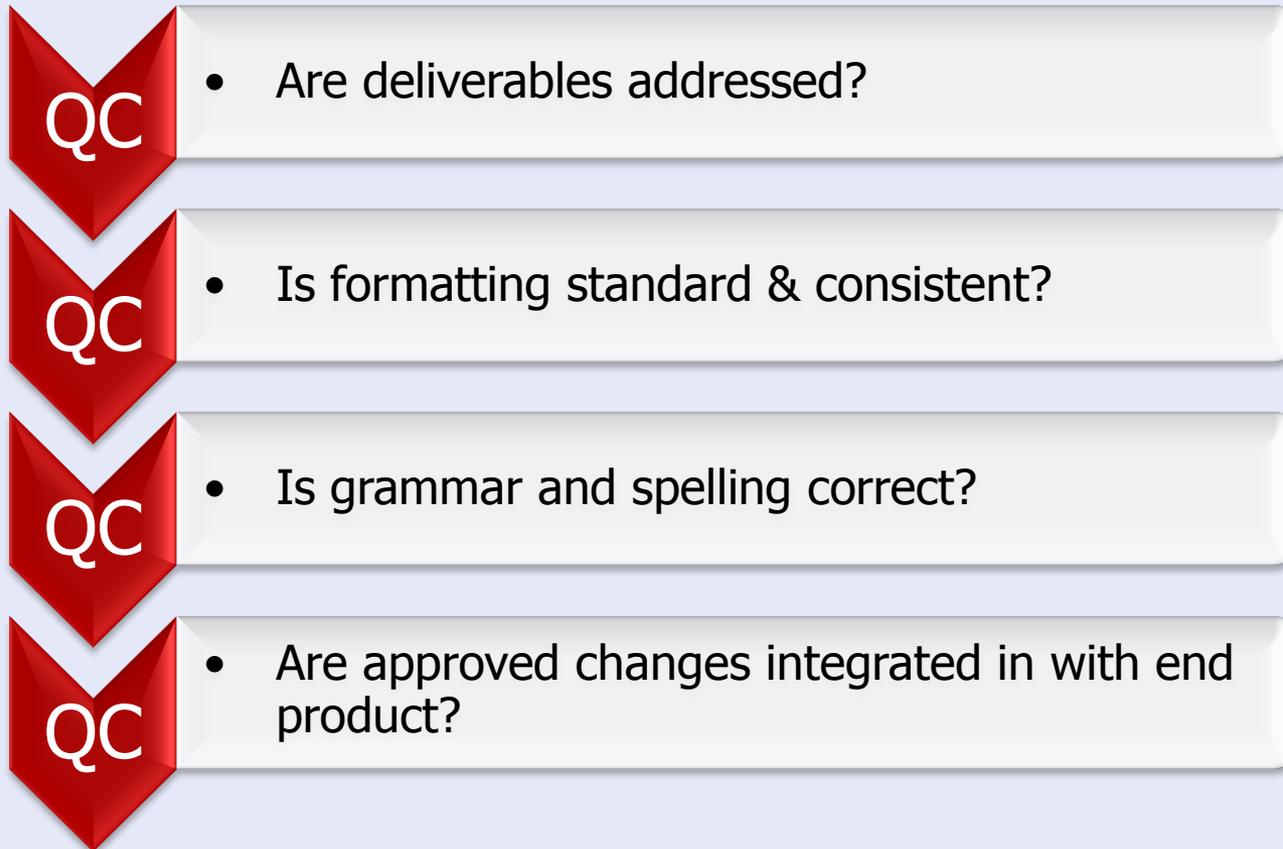
Quality  
Control

- Inspections

Quality  
Assurance

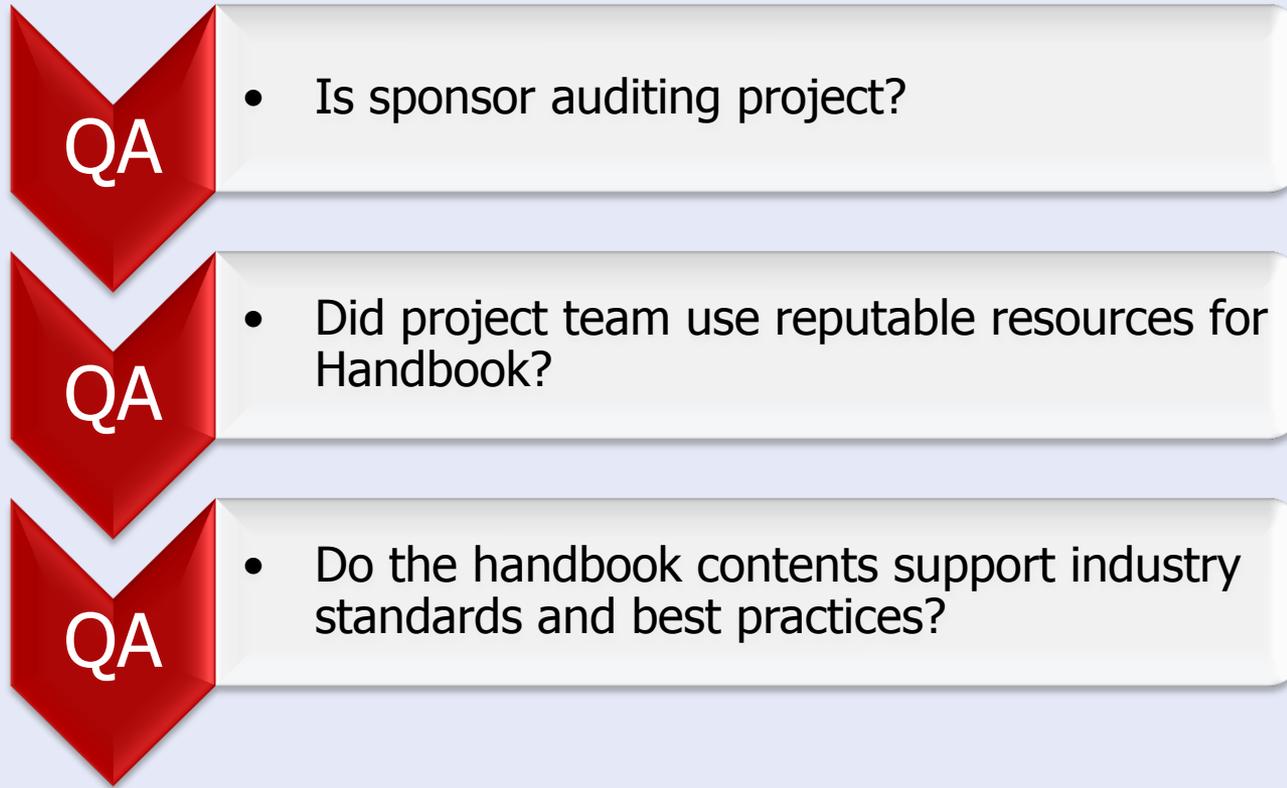
- Audits

# Quality Control



Process for inspecting contents

# Quality Assurance



Process to ensure compliance with quality standards

# Risk Management Plan



# Risk Register

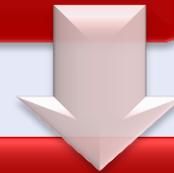
<b>Risk</b>	<b>Root Cause</b>	<b>Contingency Plan</b>
Handbook printing outsourced	Print requirements changed	<ul style="list-style-type: none"><li>• Print Handbook in-house</li><li>• Print one copy for sponsor</li></ul>
Project team member(s) unavailable	Illness, work, family emergency, etc.	<ul style="list-style-type: none"><li>• Audio tape</li><li>• Note cards</li><li>• Team members</li></ul>
Web-based document repository	Accessibility, technical issues	<ul style="list-style-type: none"><li>• <a href="http://www.wiggio.com">www.wiggio.com</a></li><li>• Email</li></ul>

# Project Assumptions

Applicable for State needs



Best practices promote affordability and efficiencies



Conduct self-assessments of in-house abilities

# Project Constraints

Revised print requirements triggered  
scope change



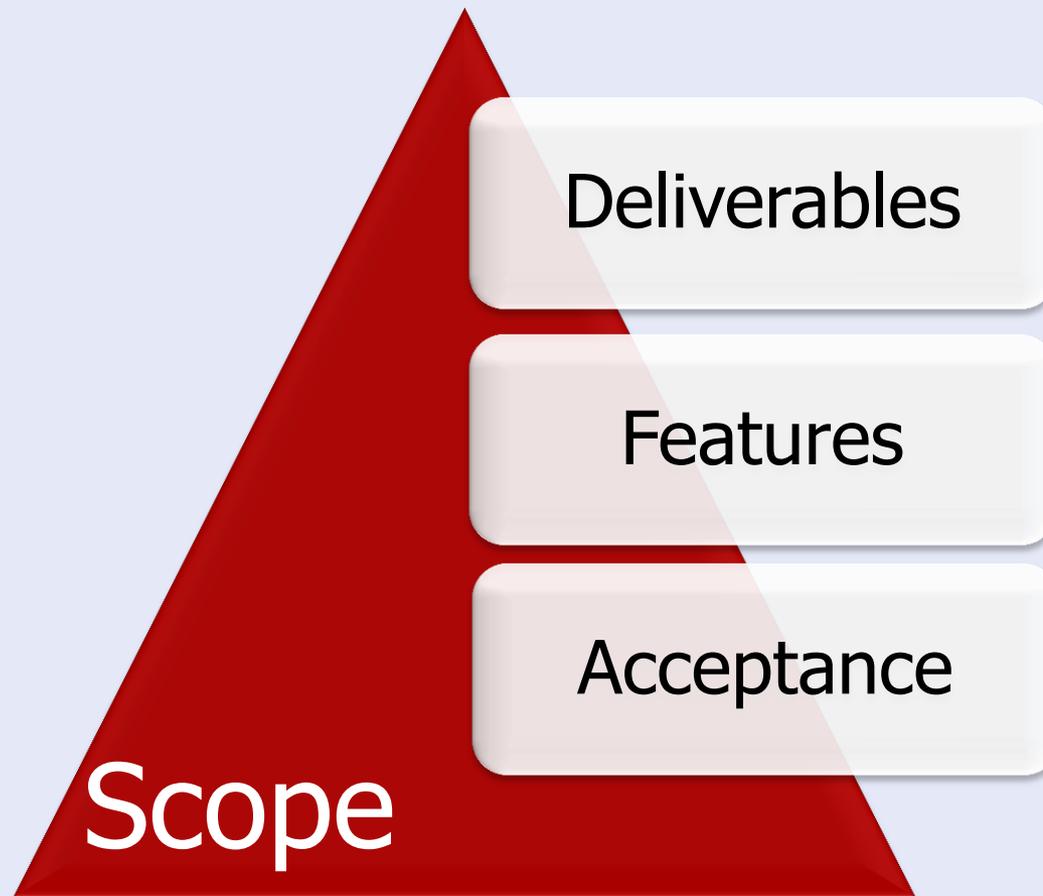
Limited ability to gain input from  
State agencies

# SWOT Analysis



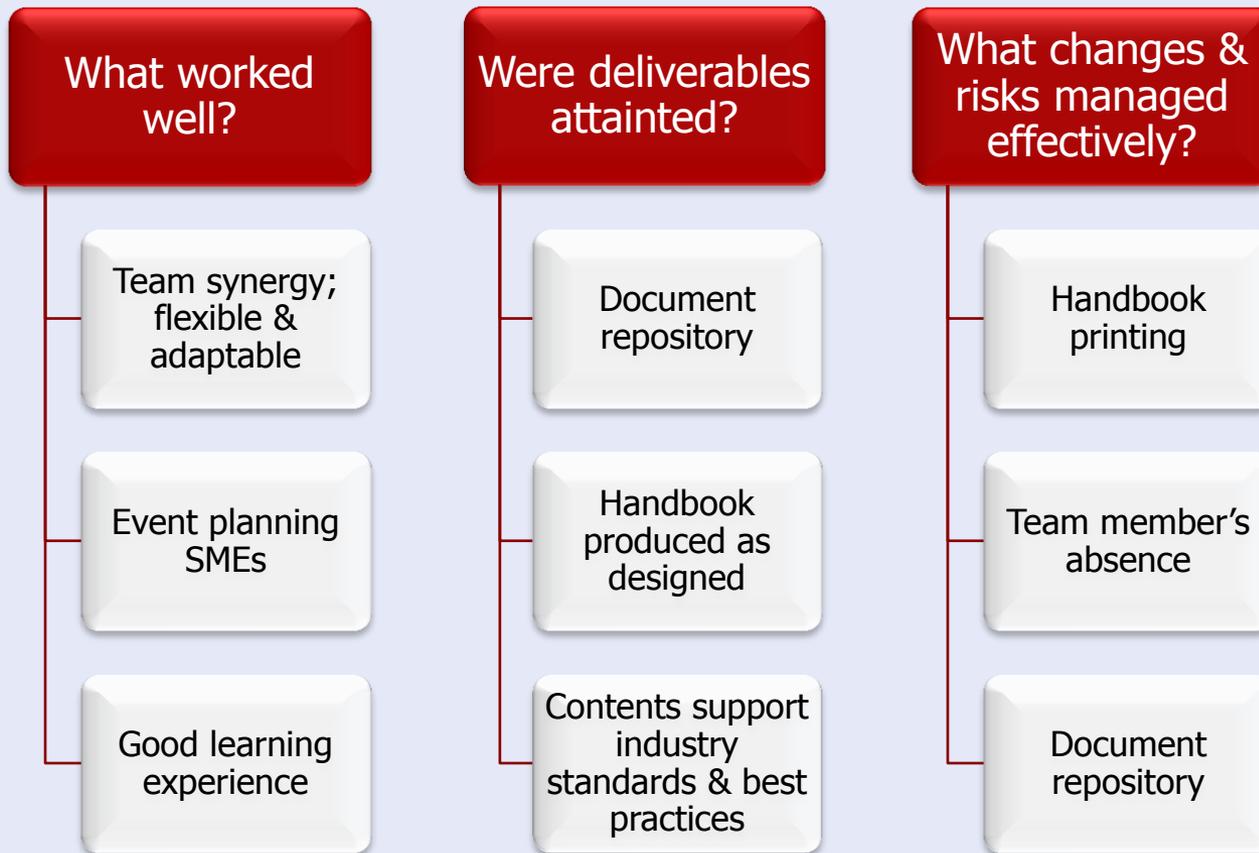
Project's Key Strengths, Weaknesses, Opportunities and Threats

# Change Control Management



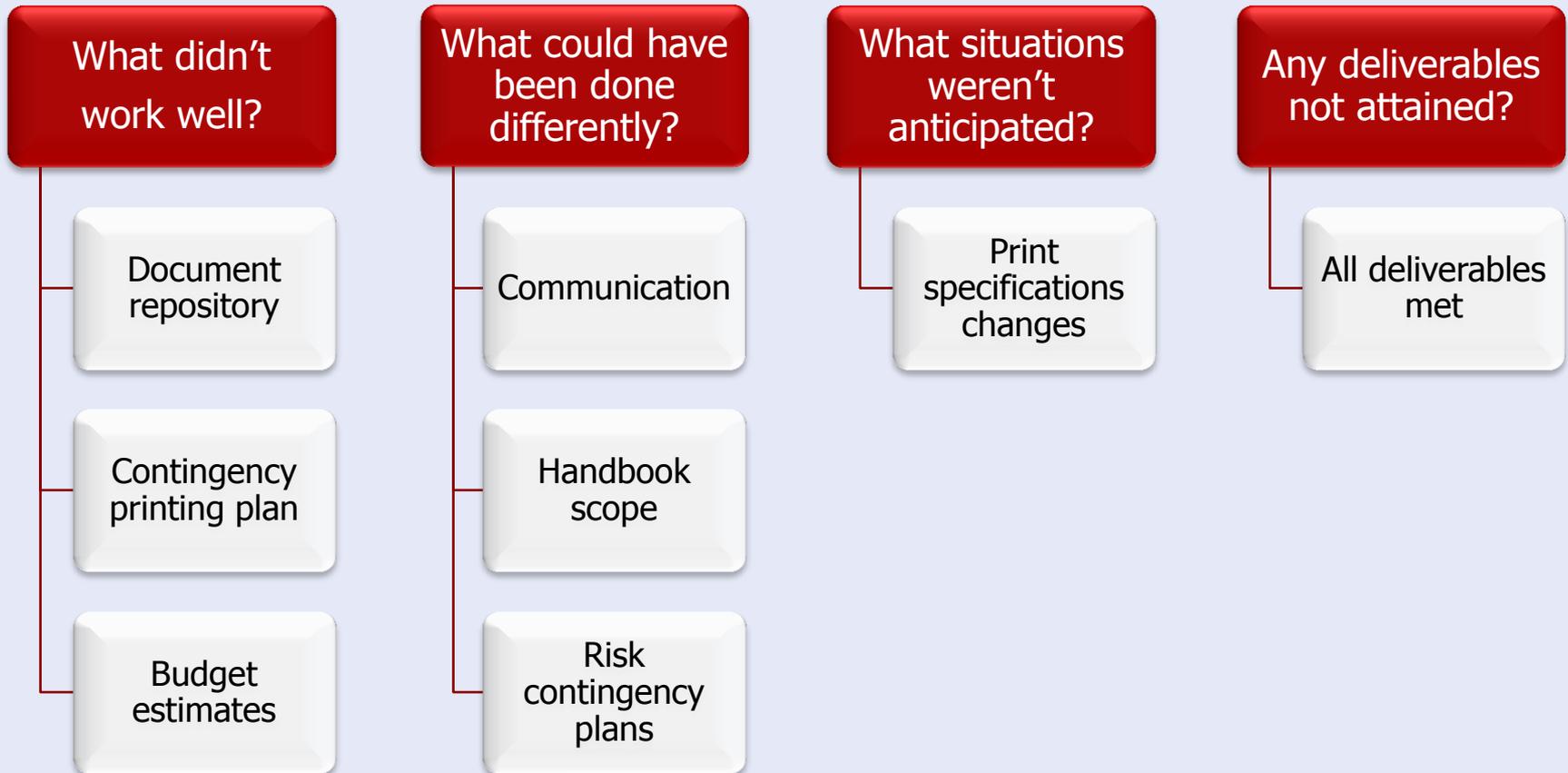
# Lessons Learned

## Significant Project Successes



# Lessons Learned

## Significant Project Shortcomings



# Project Product Review



# Questions and Answers

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