The Event Guide
your corporate, non-profit and social event Solution
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Rebecca Lehner  
PPW Independent Study  
Spring Semester 2009  
16 April 2009  
Instructor: Pam O’Brien
**THE JOB DESCRIPTION**

Professional event coordinators may specialize in specific types of events and event clientele, focusing on one or two primary event genres. However, event professionals should also have an understanding of the role and scope of all types of events.

In order to best serve the target market, an event coordinator should analyze the needs, resources and physical requirements for all aspects of an event. You may discover strategies for improving an event experience by utilizing the step-by-step event procedure.

As an event coordinator, you must serve both the “users”--attendees and guests--and the “customers”--clients and sponsors--creating an event that delivers the expected experience (Silvers, Professional Event Coordination 3).

The professional event coordinator uses a sequential process to produce events of any genre or scope to deliver an intended experience. Basic steps include:

- Conducting the necessary research to determine expectations and to create a customer profile of event attendees.
- Conceptualizing the event.
- Determining which event elements and components will provide the desired experience.
- Visualizing how all of the components will fit together, and designing the implementation strategy.
- Selecting the best products and providers available.
- And finally, monitoring the delivery of the experience.

Though the tasks listed above may seem simple, the job of an event coordinator can be extremely stressful. The faint of heart will not make it in this cut-throat industry.

**DO YOU HAVE WHAT IT TAKES?**

The role of event coordinator is a demanding one. Your responsibilities change from day to day and from minute to minute. An event planner must be able to:

- remember details
- manage personnel
- plan a budget
- administer multiple activities
- coordinate multiple activities
- market an event
- and have good administration skills

There are also certain necessary traits that a great planner must have, including:

1. **Good organizational skills and an eye for detail**--an event planner should be detail-oriented. She or he should also have the ability to make a comprehensive plan of attack (Kilkenny 241). A planner should also have:
   - good time management skills
   - the ability to keep an activity log
   - the ability to create and follow timelines
   - the capability to set daily goals and make priority lists

2. **Ability to develop and maintain interpersonal relationships**

3. **Great written and oral communication skills**--A planner must be articulate and professional. He or she should also have the ability to read non-verbal signals and the ability to listen and pay attention to the client’s needs. A planner must also feel confident enough to ask questions at all times.

4. **Creativity**

5. **Ability to maintain a level head and think quickly in tough situations**--Having the ability to work under pressure goes a long way. Something will unexpectedly come up, and it is the planner’s job to solve the problem quickly and quietly. The planner must ALWAYS remain calm.

6. **Determination and Persistence** (242)

7. **Good negotiation skills**--The planner must be able to negotiate fees and vendor prices. She or he must ALWAYS know the right person to negotiate with and ALWAYS have the appropriate knowledge of industry prices (243).
When most people think "event planner", their minds immediately jump to "wedding planner" or other social events. However, over the past 25 years, the event management industry has blossomed into a multi-faceted trade, with endless opportunities for growth. In the United States alone, there are over 325,000 professional event planners. These days, many event coordinators have found their niche in other areas of the industry, using weddings to merely supplement their income.

There are many options to consider while researching which industry niche is right for you.

**Event Planning Companies:**
- **Incentive Houses**—specialize in developing programs to motivate employees
- **Destination Management Companies**—provide local event planning services for companies that want to hold an event in a different city
- **Event Planning Firms**
- **Public Relations Firms**
- **Advertising Agencies** (Kilkenny 246)

**Hospitality Industry**
- **Hotels and Resorts**—host numerous events: banquets, business meetings, and weddings. Sales and catering, sales and marketing or sales manager positions offer experience in event planning
- **Tourism Organizations**—act as a community's official destination management company and offer dozens of services. They are a resource for event planners.
- **Clubs**
- **Cruise Lines**
- **Vendors**—provide opportunities to assist clients in planning events
- **Attractions** (247)

**The Corporate Market**
- **Corporations**—have in-house event departments and staff; events usually fall to the office manager or someone in human resources at smaller companies
- **Trade and Professional Associations**—hold annual conventions and a variety of other events for their members (248)
- **Non-Profits**—continuously hold fundraisers and other special events
- **Government Agencies**—cities, states and individual departments plan a variety of events; keep in mind the political arena and all the events produced around election time
- **Educational Facilities**—are a great market; consider homecoming events, fundraisers, alumni activities, conferences, seminars and symposiums (249)
The Main Event

LET THE PROCESS BEGIN...

There are certain first step questions that you should ask yourself if your company is planning to hold an event. If your client is planning on holding an event, he or she should ask these questions as well.

1. Should I hold an event?
2. Do I have sufficient funds to stage and event?
3. How much money do I set aside for the event?
4. What is the purpose of the event?
5. Does the event justify the financial outlay (Allen 8)?

After you or the company you work for decides to hold an event, the next step is to visualize your event from start to finish. There are certain questions you should ask yourself, including:

- What is the purpose?
- What time of year are you considering holding the event?
- What day of the week?
- What time of day?
- Who will attend?
- What type of venue will best fit? Setting? Backdrop?
- Are you planning far enough in advance that the site will be available (12)?

Defining Your Event Checklist

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Notes</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have pre-planning meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm defined vision</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify your goals and objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm financial goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create environmental standards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define roles and responsibilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Begin Talking about the Budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Begin to develop timelines and checklists</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decide what information will be shared?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are the target dates?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop agenda, format, outline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define type of site required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research site locations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define type of event to have</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify participants and their demographics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decide how to get message out</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Break down tasks assignments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create committees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Begin talking about promotional materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How will we get our message out?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine how to set your fee?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Will outside vendors be hired?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decide if outside coordination help is needed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who will be our speakers/ entertainers?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create request for proposal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ORGANIZING AND TIMING YOUR EVENT

When deciding how much planning time is required for your event, list everything that you will need, and assign a time frame to each item (Allen 10). While creating a timeline, develop a critical path--including descriptions of each item, who is responsible for each item and what the deadline is (11).

Sample Critical Path

<table>
<thead>
<tr>
<th>Task</th>
<th>Person Responsible</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest List Development</td>
<td>Michelle</td>
<td>May 01</td>
</tr>
<tr>
<td>Invitation Design</td>
<td>Judy</td>
<td>May 01</td>
</tr>
<tr>
<td>Details to Dealer</td>
<td>Judy</td>
<td>July 12</td>
</tr>
<tr>
<td>Mallhouse Booked</td>
<td>Michelle</td>
<td>July 12</td>
</tr>
<tr>
<td>First Review of Invitation Design</td>
<td>Judy</td>
<td>July 26</td>
</tr>
<tr>
<td>Invitations to Printer</td>
<td>Judy</td>
<td>August 03</td>
</tr>
<tr>
<td>Invitations Mailed to Guest List</td>
<td>Michelle</td>
<td>September 13</td>
</tr>
</tbody>
</table>

After creating a critical path, you should always create a function sheet--an information guide that tells your supplier how you want your event to be handled. Make sure to include:

- What has been contracted
- What is included
- Costs agreed upon
- How you want details arranged (21)

Every supplier and key player should receive a function sheet in time to make changes. A few days before your event, set up a meeting with staff and suppliers to review the function sheet and do a final walk-through. The function sheet should begin with contact sheets, which include: all names, titles, company names, addresses, phone numbers and email addresses (22).
CHOOSING A DATE

Choosing a date is one of the most important aspects of the event planning process. Choosing the wrong date can make or break an event. Be sure to fully investigate the following areas and look at the impact that these areas could have on your event:

- Major holidays
- Religious observances
- School breaks
- Long weekends
- Sports events
- Other special events and considerations (Allen 31)

Do some research by searching online for local events or by calling your local Convention and Visitors Bureau. Make sure that there are no similar events on the same day (Kilkenny 100).

WRITING AN EVENT PROPOSAL

An event proposal does not have to be a response to another company’s request. You can develop the proposal from a perceived opportunity (O’Toole and Mikolaitis 101). The estimates in your event proposal do not have to be exact. You may estimate quality, price, delivery times and risk from standard resources.

Your proposal should contain:
- Cover letter
- Title page
- Proprietary notice—cautions about unauthorized disclosures should always be at the front of the proposal because of legal reasons
- Table of contents
- List of abbreviations
- Executive summary
- Body of the proposal
  - Profile of event company
  - Mission, background and credentials
  - Previous similar events and resources
- Project patterns and profiles
- Event-specific information
  - Objectives
  - Scope of work
  - Stakeholders
  - Themes, designs and ideas
  - Site/venue assessment
  - Resources required
  - AV, entertainment, catering, staff and suppliers
  - Marketing and promotional services required
  - Budget—corresponding to functional areas of program elements
  - Control meeting—reporting processes, organizational structure and responsibilities
  - Schedules—planning, transportation, running order and promotion
  - Environmental impact—natural environment, traffic and transportation

Always make sure to ask how the company would like you to present the proposal. Some companies expect that you will show up in person to present the proposal, while other companies merely want you to fax the proposal over to their office for evaluation (104).
BUDGETING FOR AN EVENT

Event budgets can be crucial to the success of an event. Since every event planner’s goal is to come in under budget, every event planner should develop a preliminary budget. Preliminary budgets should include:

- Invitations and promotional materials
- Accommodations
- Transportation
- Venue rentals
- Food and beverages
- Floral arrangements and decor
- Music and other entertainment
- Speakers
- Staging
- Audio-visual
- Special effects
- Photographer
- Place cards and menus
- Gifts
- Insurance
- Security
- Labor charges
- Staffing
- Miscellaneous (Allen 2)

Make sure to ALWAYS get estimates in writing!!! NEVER accept verbal quotes. Also, it is important to find out if gratuities are estimated as a straight percentage or as a total bill. DO NOT assume that taxes on food and liquor are the same (14). These seemingly minor costs may come back to haunt you after your event if you do not ask in the first place.

Tip: It is better to wait than to stage a shoddy event on a shoestring budget

(Allen 2)

Keep updating the budget as you add and subtract items. Be sure to save each updated budget in a separate file with a date and number, and compare the actual amounts to the projected figures (15).

Before you sign a contract, prepare a payment schedule to see if you need to adjust any due dates.

SELECTING A VENUE

Before selecting your event venue, make sure to conduct a site evaluation to establish whether the venue suits your needs. The site evaluation should include:

1. **Availability**--date(s) and duration, including move-in and move-out requirements and acceptable service levels

2. **Location**--accessibility, proximity to other attractions and surrounding environment

3. **Rates**--rental fees, costs for site development, food and beverage charges and surcharges

4. **Attendance**--occupancy capacity, anticipated behaviors, arrival and departure modes and ancillary activities before, during and after the event

5. **Function Types**--educational, ceremonial, social, political etc.

6. **Event Elements**--room dimensions, spacial requirements, activities, access logistics, storage and administrative functions

7. **Style or Personality**--conservative, adventurous, youthful, mature, rustic, luxurious, unique, or theme specific (Silvers, Professional Event Coordination 66)

After selecting your event venue, be sure to create a venue/site map (especially for events like conferences or trade shows). The venue/site may include some of the following:

- Scale and direction (north)
- List of symbols used on the map
- Entrances and exits
- Roads and parking
- Administration center
- Information booths
- Pathways
- Telephones
- Electric and water outlets
- Restrooms
- Danger spots
- Media areas (77)
Contracts are one of the most important aspects of coordinating an event. If a contract is faulty, you may end up in trouble after the event. All good contracts include:

- Title
- Brief description of the event
- Brief description of the services or equipment needed
- Detailed list of the services to be provided with projected dates of delivery
- Person or company responsible for what parts of the project (contractor, subcontractor, staff)
- Expectations for communicating the progress of the project
- Payment schedule and amounts
- Clarity on expenses (hourly rates versus fixed pricing)
- Ownership of the work products
- Conflict resolution
- Process by which each parties may void the contract
- Proper signatures (Kilkenny 184)

There are also multiple rules that you should live by while creating a contract.

1. **ALWAYS** sign a contract as an agent on behalf of your company or the company that hired you. You do not want to be held responsible.

2. **LOOK FOR** clearly stated dates, rates, intentions, names, contacts and numbers (hotel rooms, meals and exhibitors).

3. **ALWAYS** read every word in the contract.

4. **PAY ATTENTION** to cut-off dates. Be sure to keep in regular contact with suppliers even after the contract is signed.

5. **ASK FOR** a clause in the contract that states that any fees not in the contract will not be applicable to your group.

6. **NEVER** sign a contract unless you agree with it in its entirety. Cross our or edit clauses with which you do not agree, initial them and get the supplier to initial his or her agreement, too.

7. **MAKE SURE** that the cancellation clause is reciprocal. Contract offers are inherently one-sided. It is your job to balance it out (187).

8. **SPECIFY** the dates and times in the contract, i.e.: “The cut-off date for sleeping room reservation is Saturday June 28, 2009 at 5 PM”, instead of “The cut-off date is 30 days before the meeting.”

9. **MAKE SURE** all associated fees are stipulated in the contract.

10. **INCLUDE** all tax and gratuity percentages in your contract. Understand what they are and how they are calculated.

11. **NEGOTIATE** attrition (reduced attendance) into your contract for rooms, food and beverages. Ask that attrition be calculated at their profit, not their full rates. If the hotel can pick up the rooms, negotiate that no attrition fee be necessary.

Cancellation and attrition fees should be based on the meeting site’s lost profit not lost revenue. This can be 70 percent to 80 percent for guest rooms and 30 percent to 40 percent for food and beverages.

12. **THE CONTRACT SHOULD ADDRESS** which entity is responsible for the safety and security of the audio-visual equipment. Ideally, it should be the audio-visual company. The event planner SHOULD NOT accept responsibility for stolen or damaged equipment (187).
The design of your event and the decor that you choose can make or break the event. It is important to utilize light, color, texture and fragrance to influence your guests on not just a physical level, but an emotional level too.

Pine and Gilmore, authors of The Experience Economy, propose five principles for developing a theme for your event. These five principles include:

1. Altering your guest’s sense of reality
2. Affecting your guest’s experience of space, time and matter
3. Integrating space, time and matter into a cohesive, realistic whole
4. Strengthening your event by creating multiple places within a space
5. Developing the character of the enterprise through various staging methods (Silvers, Professional Event Coordination 205)

**Color**
The use of color is a crucial component of any event. Event planners use color to incite emotion or to express emotion. There are many different ways to define color, including:

- **Hue**—the answer to the question, “What color is it?” Red is a hue. Blue is a hue.
- **Value**—the lightness or darkness of a color
- **Saturation**—the intensity or purity of a color; saturation can be changed by:
  - Adding white—tint
  - Adding gray—tone
  - Adding black—shade
  - Adding the color’s complement (Hancock 259)

**Texture**
You can create texture at your event by using various fabrics for table linens, drapery and upholstery. Create levels of texture through the use of foliage, displays, various props and materials that mesh with your event. As a safety precaution, always make sure that all fabrics and props are flame resistant.

**Fragrance**
An event professional can create an entire atmosphere at an event using different fragrances. Professional fragrance companies can help you with diffusers and specialized scents. There are 6 main fragrance families:

- Floral (jasmine, rose, neroli)
- Citrus (mandarin, lime, tangerine)
- Spice (nutmeg, cinnamon, cardamon)
- Trees (pine, juniper, birch)
- Herbs and grasses (rosemary, thyme)
- Resins (Balsam)

You can create subtle fragrances at your event using diffusers, bowls of water or fountains, humidifiers, linens, cotton balls, flowers, room spray and various other techniques. However, fragrances also have certain “Do’s and Dont’s” that you must remember, including:

- **DO NOT** have fragrances so strong that guests walk in and immediately ask, “What’s that smell?”
- **DO NOT** use recognizable, single fragrances. Create a blend of fragrances instead.
- **DO** use fragrances that are appropriate to your theme and setting.
- **DO** have fragrances “appear” and “disappear”. Perhaps only use the fragrance as guests arrive and leave (261).
The primary goal in event marketing and branding is to develop an entire visual and emotional experience for the attendees before, during and after an event. The event marketer customizes each project to create and execute any level of brand experience that supports the client’s objective.

Before developing marketing materials for an event, sit down with the company to write a personality profile. The marketing materials need to fit the client’s persona. A personality profile should include:

- Who the company is
- What the company wishes to achieve through the event
- And how to achieve the company’s goals and objectives

The event itself must reflect the themes and concepts that the company wishes to portray to its clients, including ideas and materials. All the event elements must convey a comprehensive, visually consistent campaign.

Event coordinators and event marketers should also take into consideration various themes and concepts while branding their event, including:

- Inspiration—i.e. art, fashion, music, pop culture, nature, nostalgia, food, travel, everyday observations etc.
- Trends v. Fads—Know the difference!!!
- Find Your Own Style—Take something old and turn it into something new: mix luxury with ordinary, modern with old school, punk with couture etc. Embrace paradoxes (Dinh 367).

Developing the theme for an event is all about inspiration. Ideas can come from television, movies, theater, music, magazines, books, conversations, shopping, photographs, etc. Theme development, like event coordination, starts with the purpose of the event and the client’s expectations of the outcome. Listen to the client talk about why he or she is having the event and what the client wants to happen as a result of the event. Defining the end product and customer profile establishes the criteria for theme development.

There are various methods to advertise or market your event to the public. Many event coordinators have recently turned to using swag bags, innovative materials, event collateral materials and publicity materials on top of the typical invitation.

Swag Bags
Take home mementos make a lasting impression on guests. Gather donated items from sponsors and create a bag with items that go with the event theme.

Innovative Materials
Find the most creative ways to package invitations, including:

- cellophane
- vellum
- transparency paper
- fabrics
- tubes
- boxes
- different envelope shapes

Start collecting resources for graphic designers, paper, printing, assembling, die cut and scoring. It is helpful to have a source that can do all of these things.

Event Collateral Materials

- Save the date cards
- Response cards
- Soliciting sponsorships and ads
- Event posters
- Event brochures
- Event flyers
- Other advertising methods (i.e. magazine and newspaper advertisements)
- Event photos

Publicity Materials (Press Packages)

Publicity materials encourage the press to feature the event in the party pictures column, thus maximizing press exposure for the client.

- A pre-event release generally accompanies an invitation to the event
- A post-event release is sent after the event, accompanied by pictures from the event and a swag bag from the event (368)
WRAPPING UP THE EVENT

Tying up loose ends, like paying bills and generating reports, is the final task of your event. Pre-arrange a debriefing meeting with everyone involved to review the event within the following week. The event will still be fresh in everyone’s mind.

Debriefing Meeting

- What worked? What did not work?
- What would you do differently next time?
- Were your goals and objectives met?
- Did you realize your defined vision?
- Did you come in on budget? Did you spend more in one area than anticipated? If so, why?
- What unanticipated expenditures did you have? Were they necessary?
- Did your participants seem to enjoy certain aspects over others?
- Were the speakers or entertainers appropriate?
- Was the food appropriate?
- Were the lighting, staging and sound right (Kilkenny 234)?

Pay Bills

Make sure to get copies of the final report from the facility, including how many rooms were booked, all the numbers of food and beverages and audio-visual usage. If possible, find out how many participants used the facilities such as restaurants, pools and spas and room service.

Thank-yous

Say “thank you” to everyone as soon as possible after the event. Be specific. When appropriate, put your thank-yous in the form of a letter. In some cases, a phone call will be adequate. ESPECIALLY THANK YOUR VOLUNTEERS!! Many people worked very hard to make your event successful. Make sure they know how much they meant to that success.

DO NOT FORGET YOUR VENDORS. They need to know that their services and their personnel did a good job. Remember, you may need them in the future.

Follow-Up Evaluations

If your participants filled out evaluations at your event, make sure to tabulate the evaluations right away. They provide important information that you can use for future event. Prepare an organized summary including some of your personal interpretations of the event (235).

(continue to page 10)
WRAPPING UP THE EVENT

Final Report:

Put everything in a final event report. The report should include:

• Event name, date(s) and location
• Goals and objectives
• Number of participants—paid
• Number of participants—complimentary
• Facility reports with number of rooms, food and beverages
• Evaluation summation
• Conclusions you made from the debriefing meeting
• Copies of all marketing materials
• Timelines and checklists
• Budget estimates
• Volunteer and staff lists
• Supplier records—include phone numbers, key information and any evaluations
• Invoice copies

Use reports for future events (Kilkenny 236).

MANAGING RISK

Risk management is an event coordinator's ability to recognize the exposure to the possibility of loss, damage or injuries arising from uncertainty. Make and carry out decisions that maximize the potential of favorable outcomes and minimize adverse effects of potential loss.

What is a risk?

• People--bodily injury/death
• Property--loss/damage
• Finances--reduced revenue
• Systems--reduced capacity/capability
• Environment--reduced availability
• Image--loss of reputation

Risk Management Process

• Risk Planning--develop a systematic and continuous approach for identifying, handling, tracking, evaluating and documenting risks

• Risk Assessment--identify and analyze event elements and processes to increase the probability of success and reduce the impact of potential loss

• Risk Response--evaluate, select and implement techniques for handling risks, including what is to be done, when and by whom.

(Silvers, Event Solutions Conference and Tradeshow Handbook (181))

Fact Sheet Following the Event

<table>
<thead>
<tr>
<th>Statistics</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Event</td>
<td></td>
</tr>
<tr>
<td>Event Coordinator(s)</td>
<td></td>
</tr>
<tr>
<td>Defined Vision</td>
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<tr>
<td>Goals and Objectives</td>
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<tr>
<td>Dates:</td>
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<tr>
<td>Fees for participants:</td>
<td></td>
</tr>
<tr>
<td>Budget:</td>
<td></td>
</tr>
<tr>
<td>Speakers:</td>
<td></td>
</tr>
<tr>
<td>Topics:</td>
<td></td>
</tr>
<tr>
<td>Agenda:</td>
<td></td>
</tr>
<tr>
<td>Meeting rooms:</td>
<td></td>
</tr>
<tr>
<td>Exhibits:</td>
<td></td>
</tr>
<tr>
<td>Special events:</td>
<td></td>
</tr>
</tbody>
</table>

(Kilkenny 277)
Works Cited

Books


Photos (in order of appearance)


Event photo. Photograph by Riverside Events. 2007.


Special event contract. Photographed by Paragon Restaurant.

Fragrance event photo. Photographed by Unknown.


30 COST SAVING TIPS FOR MEETING PLANNERS

It is crucial, especially during tough economic times, for an event coordinator to have top negotiation skills. Below is a list of 30 ways that you, as an event planner, can save money on your events—all through contract negotiation.

1. Flexible dates can save $$$
2. Negotiate comp rooms
3. Negotiate upgrades
4. Negotiate staff rooms (Scheff 303)
5. Negotiate rebooking clause
6. Negotiate acceptance/storage of boxes
7. Negotiate “correct invoices” clause
8. Negotiate food and beverage discount
9. Negotiate surcharge clause
10. Negotiate audio-visual discount
11. Negotiate comp mics
12. Negotiate internet in sleeping rooms
13. Negotiate discount parking
14. Secure sponsors
15. Signage savings
16. Printer purchase v. rental
17. Put audiovisual out to bid
18. Share audio-visual with previous planner (304)
19. Negotiate flat fee for speakers
20. Share speakers with other group
21. Savings with rental linens
22. Savings on centerpieces
23. Give accurate guarantees
24. Butlered hor d’oeuvres save $$$
25. Centralized meeting breaks
26. Buy on consumption
27. Compare purchase methods
28. No wine with dinner
29. Shorten receptions
30. Ask what comp props are available (305)

SAMPLE CHECKLISTS

Budgeting

Here is a list of expenses to get you started. Some will be appropriate for your event and some expenses are not included here. Create your own list to suit your event.

<table>
<thead>
<tr>
<th>Activity/Items</th>
<th>Estimate Cost</th>
<th>Actual Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities—extracurricular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative overhead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio/visual equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bartenders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications—cell phones, pagers, radio, copiers, computers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food and Beverage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Freight and Shipping</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furniture/electronic rentals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts for speakers, VIPs, volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labor Charges</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lodging for speakers/VIPs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting Planner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel / Staffing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Photographer / Photography</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postage / Mailing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotional Materials/Printing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public relations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Kilkenny 264-65)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Complete Room Set-up

The following table can be used when all food and beverages, room setup, and audio visual equipment requirements are known. This is a good reference table to use for you, your volunteers, the venue, and staff.

<table>
<thead>
<tr>
<th>Room Name</th>
<th>Time</th>
<th>Event</th>
<th>Setup</th>
<th>Audio/Visual</th>
<th>Food and Beverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marin A Check</td>
<td>11 a.m.</td>
<td>Lunch—Keynote speaker Ms. Morgan</td>
<td>Reunions for 100</td>
<td>LCD Projector</td>
<td>Lunch for 100 Chicken with veggies Ice Tea and Lemonade</td>
</tr>
<tr>
<td>room at 10:30 a.m.</td>
<td>2 p.m.</td>
<td>Ms. Morgan</td>
<td>12 tables with linen 8 chairs per table</td>
<td>LCD Projector</td>
<td></td>
</tr>
<tr>
<td>Sonoma B</td>
<td>8 a.m.</td>
<td>Meeting Ms. Sek</td>
<td>Theatre Style</td>
<td>LCD Projector</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>5:30 p.m.</td>
<td></td>
<td></td>
<td>LCD Projector</td>
<td>2 rolls rolls</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LCD Projector</td>
<td>1 gal decaf</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LCD Projector</td>
<td>1 gal hot</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LCD Projector</td>
<td>water with tea</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LCD Projector</td>
<td>5 dozen</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LCD Projector</td>
<td>Danish</td>
</tr>
</tbody>
</table>

(Kilkenny 273)