

Conference and Annual Meeting Planning



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Meet the Speakers



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Overview

- Introduction of the profession
- Results of the pre-webinar survey
- Event planning process
- Resources
- Q&A

Introduction of the Profession

Economic Impact



225 million attendees



1.78 million employed



\$280 billion to organize

Industry Structure

Convention Industry Council (CIC)
CMP

American Society of Association Executives (ASAE)
CAE

International Association of Exhibitions and Events (IAEE)
CEM

Meeting Professionals International (MPI)

Professional Convention Management Association (PCMA)

Virtual Edge Institute (VEI)
DES



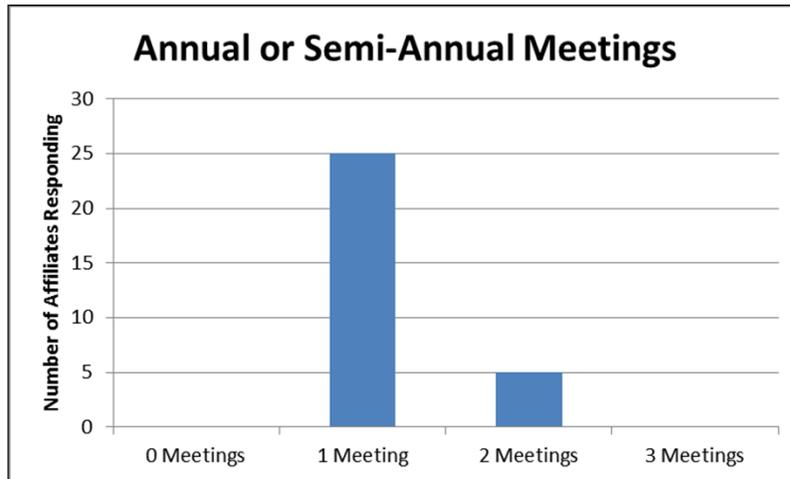
2000

**Event
Management
Body
Of
Knowledge**

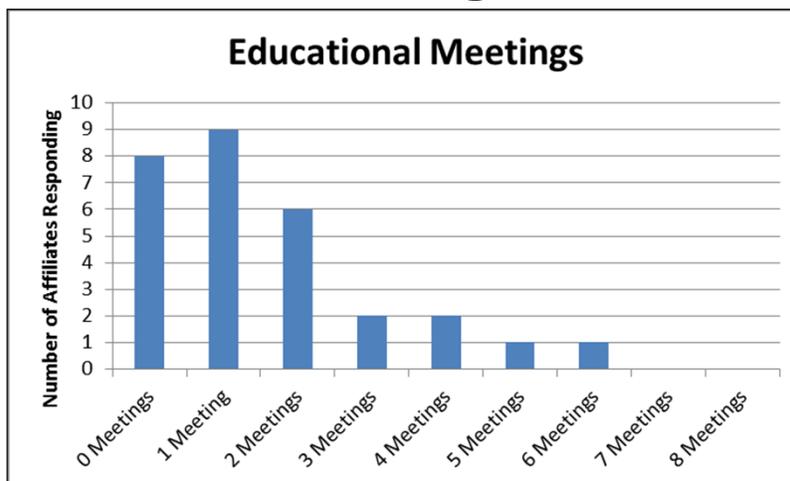


**Results of the
Pre-webinar Survey**

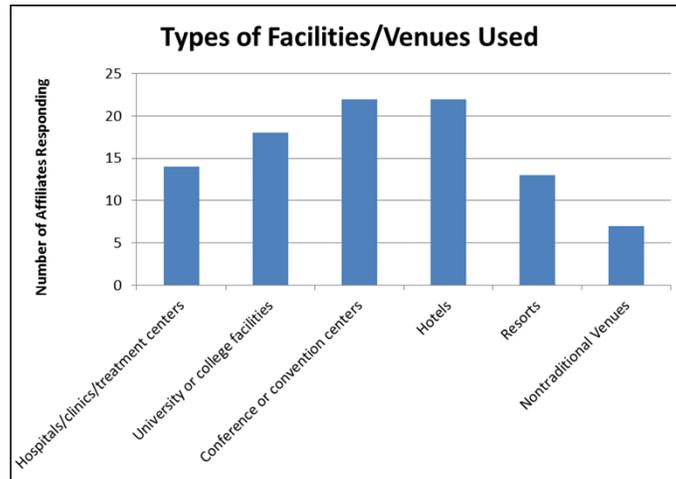
How many meetings are you holding?



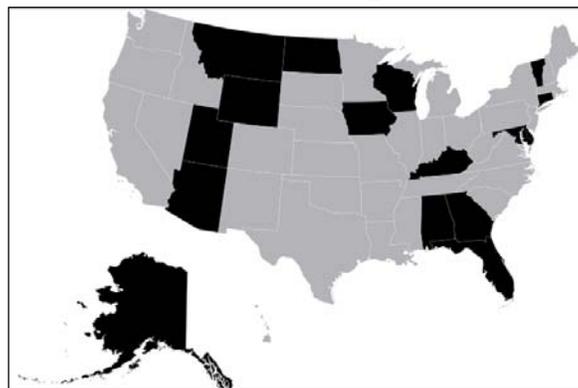
How many meetings are you holding?



What types of facilities and/or venues are you using?



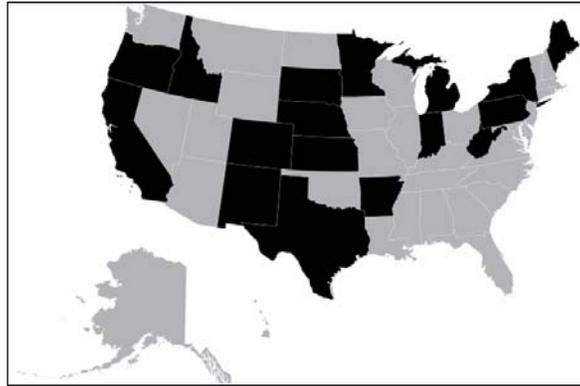
How large is your annual meeting?



Map created using http://www.amcharts.com/visited_states

Small Meetings
(<100 attendees)

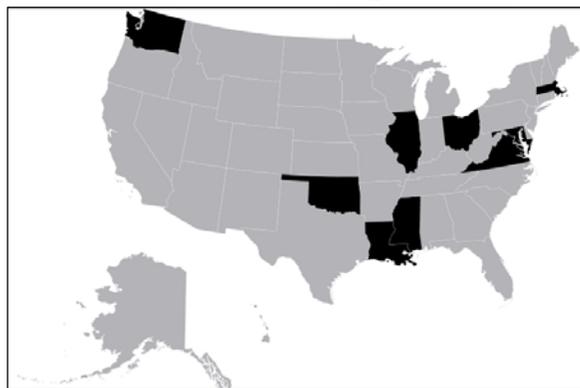
How large is your annual meeting?



Map created using http://www.amcharts.com/visited_states

Medium Meetings
(100-250 attendees)

How large is your annual meeting?



Map created using http://www.amcharts.com/visited_states

Large Meetings
(250+ attendees)

Event Planning Processes

Strategic Planning



First and foremost:
Start with the GOAL of the meeting!

Measuring Success



Organizational Philosophy



Tax Exempt



Nonprofit

Budgeting Strategy

Incremental



Zero-based



Building a Budget

- Identify categories for revenue and expenses
- Estimate and/or research amounts
- Set prices (reg fees, sponsorships, etc.)



Building a Budget

Fixed



Variable



Indirect



Break-Even Analysis Attendance

Fixed Costs

(Registration fee – variable costs/per person)

Break-Even Analysis Registration Fee

Fixed Costs

+ Variable costs/per person
Estimated Attendance

Break-Even Analysis Profit

$$\frac{\text{Fixed Costs} + \text{Desired Profit}}{\text{Estimated Attendance}} + \text{Variable costs/per person}$$

Identify Fixed & Variable

Buffet lunch	Signage
Microphone and podium	Meeting room rental
Name badges	Décor
Speaker honorarium	Screen and projector
Event insurance	Plated dinner
WiFi Internet access	Staging

Identify Fixed

	Signage
Microphone and podium	Meeting room rental
	Décor
Speaker honorarium	Screen and projector
Event insurance	
WiFi Internet access	Staging

Identify

Variable

Buffet lunch

Name badges

Plated dinner

Identify Fixed & Variable

Microphone and podium	Buffet lunch
Speaker honorarium	Name badges
Event insurance	Plated dinner
Signage	
Meeting room rental	
Décor	
Screen and projector	
WiFi Internet access	
Staging	

\$8,000 fixed

\$200/per person

Break-Even Analysis Attendance

\$8,000 Fixed Costs

(\$300 Registration fee – \$200 variable costs/per person)

80 attendees to break-even

Break-Even Analysis Registration Fee

$$\frac{\$8,000 \text{ Fixed Costs}}{80 \text{ Estimated Attendance}} + \$200 \text{ Variable costs/per person}$$

\$300 reg fee to break-even

Break-Even Analysis Profit

$$\frac{\$8,000 \text{ Fixed Costs} + \$8,000 \text{ Desired Profit}}{80 \text{ Estimated Attendance}} + \$200 \text{ Variable costs/per person}$$

\$400 reg fee to meet profit target

What about the students?

- Identify total revenue from registration fees
- Offset fees as necessary

1 attendee @ \$400

1 technologist @ \$600

1 attendee @ \$400

1 student @ \$200

\$800

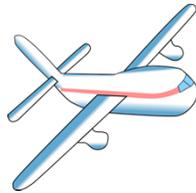
\$800

Site Selection



Ease of Access

- Will most attendees be flying or driving?
- Local airport access/cost
- Additional transportation needed?



Cost/Available Concessions

- Meeting space rental
- F&B minimums
- Changeover fees, patch fees
- Internet cost
- Exclusive vs preferred vendors – any restrictions or add-ons?

Required Space Accommodated

- Does it have the space you really need?
- Accessibility and convenience of space



**Need for variety
or comfort in consistency?**

Special Events

- Onsite vs off-site
- Hosted vs ticketed
- Community outreach
- Fundraising?
- Include as part of sponsor package

Housing



Determining Room Block

- Base on past history and pattern
- Peak nights vs shoulder nights

Day	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Mon
Date	6/19	6/20	6/21	6/22	6/23	6/24	6/25	6/26
Run of House	10	62	252	325	266	230	155	6
Staff Rooms	10	10	10	10	10	10	10	10
Exec Suite	0	2	2	2	2	2	2	0
TOTALS	20	74	264	347	278	242	167	16

Attrition

- Be aware of all conditions
- Be realistic!

Cancellation

- Schedule/liability

Concessions/Considerations

- 1 per 40 comp nights norm
- Suites and upgrades
- Amenities, free Internet, parking, etc.

Reservation Method

- Individual (online/phone)
- Rooming list (IPO, RTM, etc.)

Contracts & Negotiations



Clauses

- Cancellation
- Force Majeure
- Mutual indemnification
- Quiet enjoyment
- Affiliate/Competitive groups

Multi-Year Contracts

- Benefit of multi-event, multi-year contracts
- “Brand” multi-year contracts

**Act in good faith –
be a good partner!**



Speaker Agreements

- Mutually binding and advantageous
- What's included?
- Clear, concise terms – cancellation?
- Payment schedules, deadlines
- Expectations

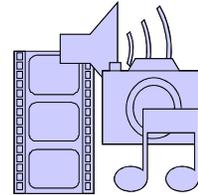


Risk Management

- ADA responsibilities
- Food allergies
- Copyright and music licensing
- Weather
- Developing and managing an emergency response plan

Vendors

- A/V – in-house vs outside vendor
- General Service Contractor (GSC)
- Floral, entertainment, signage, security, photography, transportation



Event Specifications (Specs)

- Room sets, A/V
- F&B
- Be detailed, concise, thorough – don't presume
- Meet deadlines
- Communication is key

Resources

Accepted Practices Exchange (APEX)

www.conventionindustry.org/StandardsPractices.aspx

The screenshot shows the website for the Convention Industry Council (CIC) with the APEX - Accepted Practices Exchange page. The navigation menu on the left is highlighted with a red box and includes the following items:

- APEX - Accepted Practices Exchange
- Home
- Internet Access
- IP™ Workbook
- Deposits for Proposals
- Hearing & Registration
- Event Specifications
- Post-Event Reporting
- Meeting & Site Profiles
- Contracts
- Industry Directory
- Directory FAQ
- APEX Leadership
- Directory Admin
- AFCI/ISTM (Sustainable) Events
- Open Meetings Task Force Report

The main content area features the APEX logo and the following text:

APEX - Accepted Practices EXchange

Imagine what you could do with more time to think creatively, less repetitive work to complete, and the ability to establish better relationships with your customers and suppliers.

The Accepted Practices Exchange (APEX) is an initiative of the Convention Industry Council that promotes development and implementation of industry-wide accepted practices to create and enhance efficiency throughout the meetings, conventions and exhibitions industry.

The benefits of implementing industry-wide accepted practices include:

- Time and cost savings
- Ease of communication and sharing of data
- Streamlined systems and processes
- Enhanced professionalism
- Superior results

Below the text, there is a small introductory paragraph: "Here is a brief intro to APEX from some members of its leadership team."

Q&A

THANK YOU!