

American Association for Respiratory Care

State Society Leadership Workshop

March 27, 2006 • Grapevine, TX

Program Planning
Checklist for Success

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TIMETABLE FOR PLANNING

There are many factors which will determine the timing for site selection, reserving exhibit space, arranging transportation and booking entertainment. However, **the two most important variables are size of the meeting and supply of hotel rooms.** You may adjust the timetable, depending on your meeting size.

2 to 1 Year Out

- Write out specific meeting objectives. Set the stage for a professional event
- Review budget and allocate specific amounts to separate functions
- Outline overall meeting schedule: lectures, exhibits, food functions social functions, etc.
- Determine all space requirements
- Make a site-inspection visit
- Negotiate meeting and sleeping room rates and complimentary accommodations
- Make a firm commitment to one site, sign contract, release other properties
- Choose an official service contractor for exhibits, if needed
- Write and print exhibitor guidelines for policy and control
- Post date and place of meeting on the society's web site
- Inform your "customers" of date and place of meeting
- Notify AARC of meeting dates for free inclusion on web site

1 Year to 10 Months Out

- Make a master list or calendar showing assignments and due dates for distribution to committees and volunteers
- Assign all specific tasks and all activities to committee members
- Plan and set dates for your publicity campaign
- Contact potential speakers. Once confirmed, put all details in writing
- Sell and assign exhibit space. Be precise with contract details
- Update meeting details on the society's web site
- Itemize printed matter to be produced and start designs for more complicated pieces
- Develop an on-site security system. Plan with your responsibility in mind

9 to 7 Months Out

- Finalize any outstanding speaker commitments
- Determine any shuttle bus needs and contract a supplier
- Update meeting details on the society's web site

6 to 3 Months Out

- Submit program to AARC for CRCE approval
- Select and contract entertainers, bands, etc.
- Send a "Fact Sheet" to potential attendees that includes details on the meeting's location, available transportation, recreational options and a brief outline of the program
- Update meeting details on the society's web site
- Review sleeping room block commitment with hotel
- Select menus
- Evaluate audiovisual requirements
- Order signs for use in the hotel
- Order badge holders and badge stock
- Complete meeting room layouts
- Start checking weekly with committees or those assigned specific tasks

2 to 1 Month Out

- Supply written instructions to hotel on meeting room requirements and food and beverage functions (see sample Function Sheet on page 12)
- Finalize rooming list and billing with hotel (see Rooming List Sample document)
- Update meeting details on the society's web site
- Send an updated program and "Fact Sheet" to attendees
- If applicable, release excess hotel rooms by contracted deadline
- Send speaker handout material to printer
- Make a list of phone numbers for local emergency services, nearest hospital, a 24 hour pharmacy

4 to 2 Weeks Out

- Review shuttle bus details, if necessary
- Review and, if necessary, amend hotel instructions
- Confirm with hotel the date they will accept shipped material without penalty
- Set a date and time for a pre-convention meeting with your hotel event manager
- Prepare press releases for local media

7 to 3 Days Out

- Review shuttle bus details, if necessary
- Confirm receipt of shipped material with hotel
- Print name badges
- Review ground transportation arrangements
- Contact keynote speaker to verify arrival time

On-Site

- Attend pre-convention meeting with your hotel contacts
- Hold a staff/volunteer meeting to go over last minutes instructions
- Distribute phone numbers for local emergency services
- Supply hotel event manager with copies of final program for concierge, operators, etc.

Post-Meeting

- Wrap up with a written critique
- Send thank you letters to speakers and exhibitors
- Send any AARC membership applications to the AARC within 30 days of the end of the meeting
- Send CRCE attendance logs to the AARC within 30 days of the end of the meeting
- Use your critique, registration records information and hotel room pick-up report in making decisions concerning next year's meeting details

HOTELS

Hotel Revenue Centers

<u>Department</u>	<u>% of Revenues that are Profit*</u>
Guest Rooms	76%
Beverages	68
Telephone	10
Banquet Food	8
Restaurant/Room Service Food	-8

*Note: Profit is *departmental* profit, before overhead and marketing expenses.

Six Factors Will Determine Your Leverage with Hotels

Just as planners go through the site selection process to weed out meeting facilities, good hotel marketing executives go through their own evaluation process to decide whether a planner's piece of business is worth pursuing. They examine the total number of room nights, food and beverage volume, arrival/departure pattern, season and meeting room requirements. They contact properties that the organization has used over the past three years. Only when this exhaustive process is completed do hoteliers weigh their findings against the needs of the hotels to determine whether to pursue the business. *Meeting News* magazine has identified six areas a hotel salesperson will examine when evaluating a booking. They are:

1. Total number of room nights
2. Food and beverage
3. Arrival/departure pattern
4. Season
5. Meeting space requirements
6. Your track record

How Does Your Arrival/Departure Pattern Stack Up?

<u>ARRIVAL</u>	<u>CITY HOTEL</u>	<u>RESORT</u>	<u>AIRPORT HOTEL</u>
Monday	Undesirable	Undesirable	Undesirable
Tuesday	Undesirable	Terrible	Less Desirable
Wednesday	Very good	Very Good	Very good
Thursday	Good	Excellent	Good
Friday	Excellent	Good	Excellent
Saturday	Excellent	Very Good	Very Good
Sunday	Very Good	Very Good	Very Good
<u>DEPARTURE</u>	<u>CITY HOTEL</u>	<u>RESORT</u>	<u>AIRPORT HOTEL</u>
Monday	Undesirable	Terrible	Good
Tuesday	Less Desirable	Undesirable	Less Desirable
Wednesday	Very good	Very Good	Very Good
Thursday	Good	Good	Good
Friday	Good	Good	Very Good
Saturday	Very Good	Good	Excellent
Sunday	Excellent	Excellent	Very Good

Negotiating Small Meetings - Short Lead Time Translates Into Big Clout with Hotels

Negotiating for a small meeting isn't very different from negotiating for a large meeting. The same rule applies: Make your piece of business as valuable as possible to the hotel.

Although small meetings can't offer the obvious value of a large number of sleeping rooms or elaborate food functions, they do have their own form of negotiating clout. Remember, there aren't enough major conventions to keep every hotel in your state booked solid year round. Consequently, small meetings are extremely valuable to hotels during times that they need the business.

The following are some tried-and-true ways to boost your small-meeting negotiating leverage:

- Book on short lead time
- Fill the hotel's gaps
- Be flexible on location or dates
- Switch to a smaller hotel
- Estimate attendee spending
- Promise future business
- Bundle small meetings together

28 Items to Negotiate

Sleeping Rooms

1. Rate and rate structure
2. Complimentary rooms (1/50)
3. Guarantees, deposits, cut-off dates
4. Late check-out/early check-in
5. Gratuities
6. Amenities and room locations
7. Extra housekeeping services
8. Overflow housing

Food & Functions

9. Beverage services
10. Menu items
11. Executive meeting packages
12. Guarantees and cut-off dates
13. Extra labor or service charges
14. Table decor (flowers, colored linen, carving, etc.)

Wines & Liquors

15. Brands used at reception (House, Call, Premium)
16. Gratuities and bartender fees
17. Cost of bottled brand wines vs. house bulk wines
18. Price structure (per person, per drink, per bottle)
19. Room service charge

Meeting & Exhibit Rooms

20. Price structure
21. Labor for set-up
22. Audio-visuals
23. Technicians
24. Receiving and storage of supplies

Miscellaneous

25. Attendance promotion
26. Parking fees
27. Airport pickup
28. Recreational activities

10 Points to Include in Letters of Agreement

A good letter of intent ensures that both planners and property will meet their obligations. Important points to include are:

1. Major in/out dates plus any days or early arrival or stay over. It's important to mention day of the week as well as date; with long lead times, the reader could be looking at a calendar from the wrong year.
2. Block of sleeping rooms and mix of occupancy and types of rooms. Also state room rates and applicable taxes. Will the room be singles (1 person/1 bed), doubles (2 people/1 bed), twin (2 people/2 beds), double doubles (4 people/2 beds)? How many will be standard, medium, deluxe?
3. Cutoff date for reservations and release of sleeping rooms.
4. Any space commitment to your group free of charge and how it relates to your use of guest rooms and meal functions.
5. Schedule of meeting room charges (if any) for all space you will be use. If you are using meeting space free of charge based on sleeping rooms and/or meal functions, mention how an increase or decrease in room use or meal functions will affect charges.
6. Schedule of meeting-related charges, such as audiovisuals, easels, package handling, phones, etc.
7. Payment clause: what must be paid up front, what portion of bill is payable on departure and a time schedule of payment.
8. Cancellation clause. A schedule of charges and/or mutually agreed upon result, such as net profit of forecast versus actual net profit for your dates. Some hotels have no specific cancellation clauses and some legal experts believe this leaves planners in a more vulnerable position.
9. Force Majeure. A clause outlining causes whereby both parties are released from the agreement without penalty, i.e. terrorist attack. If all points are not covered in hotel's paragraph, hand write, "See Addendum" in the cancellation clause section, then attach an addendum (see next page for an example).
10. A statement identifying authorized agents for both property and client.

ADDENDUM

To the agreement with the _____ Hotel
Re: March 26 - 27, 2006 Meeting

FORCE MAJEURE - Neither party shall be liable for failure in performing any of its obligations under this Agreement if such failure or delay is due to causes beyond the reasonable control of either party, including, but not limited to, acts of God, fire, explosion, unusually severe weather, war in the United States, invasion, riot or other civil unrest; governmental laws, orders, restrictions, actions, embargoes or blockages; national or regional emergency; acts or threats of terrorism, injunctions, strikes, lock-outs, labor trouble or other industrial disturbances (except those involving the employees or agents of the party seeking the protection of this clause), civil disorder or curtailment of transportation facilities - to the extent that such circumstances make it illegal or impossible to use the hotel facilities or for a majority of the prospective attendees to attend. Pursuant to this paragraph, the Agreement may be terminated without liability of any nature, based on such circumstance, upon written notice from client to property or from property to client, and all deposits paid under this agreement will be returned to client in a timely manner.

xxxxx
(Society's Meeting Planner)

xxxxxx
Sales Manager
_____ Hotel

Date

EXHIBITS

Exhibits are a pivotal part of many conventions and should be considered as important as any other convention responsibility, such as registration, food functions, and meetings. Further, the exhibit program should be regarded as a complement to the convention, rather than as competition.

Whether you are in charge of the exhibit area yourself, or are supervising someone assigned the responsibility, the success of your overall event requires that you assume an active role in closely coordinating your meetings and exhibits to provide attendees the maximum benefits of both. The major areas for you to understand in planning your exhibit program are:

- market analysis
- budgeting
- facility planning
- exhibitor promotion
- attendance promotion
- the role of the official service contractor
- on-site operations
- exhibitor follow-up

You must be specific with your rules and regulations controlling exhibit displays. All exhibitors are equal regardless of booth sizes, and should be given an equal opportunity, within reason, to present their products and services to the audience in the most effective manner.

For examples of an exhibitor prospectus, go to:

www.aarc.org/education/meetings/ and click on AARC Congress Exhibitor Prospectus

www.aarc.org/education/affiliates.html and click on "Region II Annual Meeting"

SPEAKERS

Good speakers are more than an asset, they are a necessity. Nothing kills a meeting faster than dull, dry speeches. Proper selection and handling of speakers is a key to convention success.

Before you can select any speakers for your program, you must have a clear idea of your meeting objectives. Get together with members of the planning group and clearly define your objectives. With your objectives in hand, you will know exactly what topics you want speakers to cover. This will narrow your search to those speakers with expertise in areas to be covered by your objectives.

Where to Look

A good place to begin looking for speakers is with fellow convention planners in other societies. Speakers who have done a good job for them could do a good job for you. Your fellow meeting planners can evaluate a speaker professionally because they are aware of your problems.

1. Get the names of any other groups your prospective speaker has addressed recently. Contact them for references.
2. Get acquainted with the speaker's background.

AARC officials and staff members are also available to present lectures.

How to Screen Potential Speakers

When considering the list of speakers who might fit into your program, there are some specific steps you should follow:

1. Talk to them on the phone and listen carefully. It can give you clues to their personality and vibrancy.
2. Give them a good description of your group.
3. State how long their presentation should be and whether it will be a morning or afternoon presentation.
4. Tell him/her frankly what honorarium you are offering and exactly what expenses you will pay. Specify arrival and departure dates.

Now they can tell you whether they are interested and available. As yet, neither of you is locked into anything.

At the end of your interview you can state that the program content is not set at that time. This always gives you an out if they prove unsatisfactory.

What to Tell Your Speakers

As soon as you have made your final choice, contact the speaker and let them know. If you use the telephone, follow up with a letter. Include these nine items in your letter:

1. Date and site
3. Purpose of meeting
4. General profile of your group, including any special interests
2. Size, general age level and gender of their audience
5. Lecture title and the topic speaker is to cover
6. Specific start and end time allotted for speech
7. Honorarium, if any, you will pay, plus exact details on expenses you will pay
8. Detailed travel information, if you are supplying it

Keep Speakers Informed

Ask, ask and ask: Can you arrange for a hotel room? Are they making their own flight reservations? Can you have someone meet them at the airport?

Send the speaker any advance material you have on the meeting itself and put their name on the mailing list for all promotion materials to be mailed prior to the convention. It will help the speaker get a better feel for your group.

Ask the speaker for a list of audiovisual requirements. You may want to specify the standard equipment you will be ordering for each lecture room, i.e., LCD projector, screen, laser pointer and podium with microphone. Be sure speaker does not specify equipment which would be wrong for your group. For example, flip charts are hard to see past the fifth or sixth row; showing videotapes is expensive.

If you plan to tape the speech, get written permission in advance. Some professional speakers object to taping.

Ask for a picture and biographical material for advance publicity and program notes.

A week before the meeting, send your speaker a reminder and include any information they might find valuable or changes which might affect them. If you have made room reservations, let the speaker know and give details of any travel arrangements you have made. Supply them with your present telephone number and the number of the hotel where you can be reached once you are in the convention city. If the speaker is to be seated at a head table, supply the names of other guests and some information about each.

MISCELLANEOUS TIPS

1. The local Convention & Visitors Bureau may have free promotional material, maps and discount coupons. They will also have a list of member companies who provide shuttle service, entertainment, etc.
2. Before visiting potential hotels prepare a list of your meeting's "needs" and "wants" for your own use during negotiating .
3. Prior to signing a contract, confirm that the hotel is not planning major remodeling during your meeting dates.
4. Utilize the on-line post card mailing system and the addresses received monthly from the AARC to advertise your meeting via a cost-effective method. See the USPS NetPost handout for assistance.
5. Ordering your signs early may save you money.
6. Use budgets and financial tools. Your event is a business operation.
7. Establish a reporting system for pre- and on-site registration.
8. Design your on-site printed program for convenience and use.
9. Set up a command center or office on-site.
10. Hold a short on-site staff/volunteer meeting each morning to highlight the day's events, announce updates, determine if you are short-staffed that day and make adjustments.
11. Plan ahead in order to carefully pack and address any return shipments.

AMERICAN ASSOCIATION FOR RESPIRATORY CARE

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FUNCTION SHEET

MEETING SITE: Hilton DFW Lakes Executive Conference Center
ROOM ASSIGNED: International IV
FUNCTION: AARC State Leadership Workshop
DATES/TIMES: Sunday, March 26, 2006 8:30 am - 11:45 am
12:45 pm - 1:45 pm
Monday, March 27 8:30 am - 11:15 am

ROOM SET UP: -Classroom for 65 (2 chairs/6' table)
-Standing lectern
-8" head table with 3 chairs
-Power strip run to the LCD table
-1 8' table inside the back door for materials
-1 large trash can
-1 easel outside the door

AUDIO-VISUALS: [We will bring our own LCD projector]
-1 projection screen -1 lavalier mic with long cord

FOOD/BEVERAGES: Please place the breaks inside the meeting room

Sunday, March 26

AM Master Coffee Break @ \$9++ per person

GUARANTEE: TBD

Monday, March 27

AM Master Coffee Break @ \$9++ per person

GUARANTEE: TBD

Additional Information: On Sunday, a shuttle bus will pick up the attendees at 2:00 pm to bring them to the AARC office for a tour

Contact: Agency Limousine & Coach
Kay Woodward
214-742-9200 or 817-284-7575

BILLING: AARC
ON-SITE AARC REP.: Sherry Milligan
DATE SUBMITTED: March 17, 2006