**ORGANIZING RETREATS AND CONGRESSES**

**1. DETERMINE YOUR OBJECTIVES, AUDIENCE, AND ORGANIZERS**

The first step in putting the meeting puzzle together is to determine the objectives and audience for the event. This is the framework. You cannot plan a budget until you know what your objectives are. You cannot find a site until you know what your purpose is. You should not proceed with your plans until you have answered these questions:

1. What is the purpose of the event? Are you bringing people together to pray or to play?
2. What is the goal and final outcome you anticipate? What do you want attendees to take away from their time together?
3. Who do you anticipate will attend? Teenagers, senior citizens, families, couples, or women only?
4. Are you working alone or with an organizing committee?

**2. OUTLINE THE PROGRAM IN BROAD STROKES**

Before you go any further, you will need to have the answers for these questions:

1. What time of year will best meet the objectives?
2. What day should the program begin and end? Tuesday to Thursday or Thursday to Sunday?
3. Will there be plenary sessions, if so, how many and what time?
4. Will there be breakout groups or seminars? How many?
5. What time will the program begin on the first day and end on the last day?
6. Will you have exhibits?

**3. OUTLINE THE BUDGET**

Ask yourself these questions:

1. Are there any start-up funds?

2. Will there be a registration fee?

3. Is registration expected to cover all costs of the event?

4. What is included in the registration fee?

5. What fees will the target audience be willing to pay?

6. How much audiovisual and high tech items will be required?

7. Will there be any meals included in the registration fee?

8. Can sponsors be obtained for some aspects of the program?

**4. CHOOSE A SITE**

What is important to consider?

1. What hotel rates will your target audience be willing to pay?

2. How many sleeping rooms do you need? On what days?

3. How will reservations be made?

4. What kind and how much meeting space will be required?

5. Will you be serving meals?

6. What are your anticipated audiovisual needs?

7. How will services be paid?

**5. FINALIZE THE PROGRAM**

Now it’s time to start finalizing the program and the multitude of details. Set the daily schedule. Choose the speakers for the plenary and devotional sessions. Determine seminar topics and who will present them. Make sure speakers know what audiovisual equipment will be provided. Ask if they require anything additional. Give them a deadline to return this information to you. You need this information to finalize your budget.

With this information in place, you can fill in the speaker expense and details of the audiovisual portions of your budget checklist.

**6. FINE-TUNE THE BUDGET**

Now that you know what the hotel expenses and program expenses, including audiovisual will actually be, you can finalize your budget.

Do your homework before you start advertising. Make sure you cover your budget with registration fees and/or subsidies and sponsorships. There is probably no generous uncle ready to bail you out if you don’t have enough money to pay the bills at the end of your event.

After you think you have included every last item on your budget checklist, add 10-15% contingency. Invariably something is left out. As you make additional requests to the staff at the facility during the event they will no doubt respond with “no problem.” Remember, the “no problem” response to your request does not mean “no charge” to you.

**7. MARKET YOUR MEETING**

Plan your advertising. You have the objectives, you have planned the program, and you know where it will meet and what it will cost. Now it’s time to invite the people to attend your event. Make sure that your advertising piece is attractive and gives all the information needed for the attendee to make a decision. Be sure that the deadline and the refund information is clear. Look at the layout of your brochure carefully. Take care that important information is not on the back of the portion that will be returned to you.

**8. PLACE THE LITTLE PIECES**

Details, details. Now is the time to place all the little puzzle pieces together for your event. Work with the hotel or facility on menus. Determine what seminars will be held in the various rooms available to you. Plan the minute-by-minute details of each daily program. Determine what system you will use to control seminar attendance in the space available. Train your helpers in their responsibilities. Make sure they know the whole program so they can answer questions intelligently.

**9. IT’S OPENING DAY**

You’re ready! Your helpers are in place and your guests are arriving. Make plans to meet with your facility coordinator daily. Be alert to last-minute decisions or changes that may need to be made on site.

Talk to the controller or accountant in charge of your account on a daily basis to control charges to the master account.

**10. HOLD THE APPLAUSE**

The meeting may be over; the last person has checked out of the hotel. You have settled your account. You have checked out of your room and are on your way home. You think it’s over? Well, the adrenalin that kept you going during the preparation and actual event may be gone, but you’re not through yet.

**Post Con-Meeting.** You started your event with a pre-con (pre-conference) meeting. Now it’s time to wrap up your event with a post-con (post-conference) meeting. The post-con is an excellent way to make your future programs even more successful than the one you just finished.

**Note: Not all the following handouts may apply to your area of the world. Use those that do apply or that can be used as examples.**

**TERMINOLOGY**

* **Comp rooms.** Complimentary room. The hotel gives you a free room night for X number of rooms occupied each night. High season standard is 1:50; ask for 1:40 or 1:35 during shoulder and low seasons.
* **Upgrades.** Agreed upon with hotel to give a suite or upgraded room from a standard room. It is usually reserved for your guest speaker or the meeting planner. The number of these negotiated will depend on the number of rooms in your block.
* **Peak Night.**  The highest occupancy you will have on any one night.
* **Room Pick up.** The actual number of rooms you used as opposed to what you contracted.
* **Attrition Clause.** It is your duty to meet room block requirements. The attrition clause requires that you pay for rooms blocked but not used because your attendance was lower than anticipated.
* **Cancellation Clause.** The cancellation clause outlines the penalty that will be incurred if you cancel an event after signing a contract. The lack of a cancellation clause in your contract does not necessarily mean that you can cancel without penalty. Be sure to meet deadlines outlined in the contract. Some contracts let either the facility or the meeting sponsor out of the agreement upon the payment of a set amount of money. Others allow cancellation under set circumstances.
* **Hot Dates.** Open dates usually available on short notice. Perhaps another group cancelled and the hotel is willing to make a good deal with you to fill the space. Here is where you can get a good deal if your dates are flexible.
* **Hold Harmless.** Both parties agree to indemnify and hold harmless one another in the event of any claim registered by a third party. For instance, if an attendee falls at the property and sues both the hotel and the planner, this says there will be no finger pointing.

**10 THINGS YOU NEED TO KNOW ABOUT CONVENTION AND VISITORS BUREAUS:**

1. Convention and Visitor’s Bureaus (CVB) are generally non-profit. They represent local and regional travel related businesses. CVB’s actively solicit business for their city; they are the super salesmen for the area they represent.
2. The CVB provides official, unbiased information about services and facilities. They will not recommend a supplier, but will give you all the information you need to choose a provider.
3. When you call a CVB, ask to speak to the staff member that specializes in the religious market.
4. The CVB can provide information about hotels and meeting space before you contact the hotel directly. You may need to contact 10 hotels to find the one that has the type of space and number of sleeping rooms you require. The CVB knows what is available and can save you search time.
5. In addition to hotel and meeting information, the CVB can provide you with maps, information on the city, housing bureau assistance, and other services.
6. Each bureau has variations on their services.
7. The CVB can counsel you on when the most economical time of year is to visit their destination.
8. The CVB works for you. Their fees are paid by membership dues, hotel taxes, city taxes or a combination of the above. They work together with local government and the Chamber of Commerce.
9. Size of your event is not important. The CVB is just as interested in your group of 10 as in 10,000.
10. The CVB can put you in touch with all the facilities in their city. But it is still up to you to work out the meeting plans, deal with contracts and negotiate rates, and manage the meeting.

**REQUEST FOR PROPOSAL**

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| Meeting Planner: Ima Planner, CMP\*Organization: Seventh-day Adventist World HeadquartersAddress: 12501 Old Columbia Pike Silver Spring, MD 20904Phone: 301 680 6204Fax: 301 680 6290E-Mail: Iplanner@whatever.com |
| Event | Women’s Ministries Convention |
| Event Coordinator On-Site | Ima Planner, CMP |
| Location | Central Florida |
| Dates (Flexible in April but require Thursday-Sun) | April 11-14, 200X |
| Estimated Sleeping Rooms by Night Require approximately 50% one bedded rooms; 50% two bedded rooms.  | Tue. April 9 | 3 |
| Wed. April 10 | 200 |
| Thur. April 11, 12, 13, 14 | 700 |
| Mon. April 15 | 3 |
| Total Room Nights | 3,006 |
| Reservations | By Individuals to Hotel Reservation Desk |
| Meeting Space Requirements | April 9 | Office for 3 |
| April 10 | Office for 3 |
| April 11 | Plenary for 700 |
| April 12, 13 | Plenary for 700; 7 breakouts for 100 each |
| April 14 | Plenary for 700 |
| Meal Functions (All meals are lacto-ovo vegetarian; eggs, milk, and cheese are acceptable). | April 11, 12 – dinner 700April 13 – lunch 700, dinner 700April 14 – lunch 700 |
| AV Requirements | To be determined |
| Payment | Individuals are responsible for room and incidentals. Master account for AV and meals. |
| Response Required | By October 31, 200x |
| Decision | December 200x |
| History | 2000 – Orlando, FL Adams Mark Hotel2001 – Bangkok, Thailand |

\*Organization Meeting Planner. Rates are non-commissionable.

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| **HOTEL/SITE INSPECTION CHECK SHEET**(Change Line Items To Fit Your Needs) |
| **HOTEL** |  |  |  |
| Total Rooms |  |  |  |
| Committable Rooms |  |  |  |
| Rack Rate |  |  |  |
| Non-Smoking Rooms |  |  |  |
| Hair Dryer |  |  |  |
| Fridge |  |  |  |
| Iron & Ironing Board |  |  |  |
| Shower/Tub |  |  |  |
| Breakfast (Full/Cont)  |  |  |  |
| Data Port |  |  |  |
| Desk/2nd Plug |  |  |  |
| Airport Shuttle |  |  |  |
| Fire Sprinklers |  |  |  |
| Smoke Alarms |  |  |  |
| Swimming Pool |  |  |  |
| Handicapped Rooms |  |  |  |
| Health Club |  |  |  |
| In-Room Safe |  |  |  |
| Renovation Plans |  |  |  |
| Comp Room Policy |  |  |  |
| In-House Restaurants |  |  |  |
| Offsite Restaurants  |  |  |  |
| Notes |  |  |  |

**20 QUESTIONS FOR CATERING MANAGERS**

What are the chef’s specialties? What is indigenous to the area? What seasonal foods can be served?

Can we meet with the chef to discuss our concepts?

Can special menus be created within our budget?

Is there a discount if we order a menu similar to another group in-house at the same time?

Do you use fresh, canned, or frozen produce? Do you have an in-house bakery?

What other functions will take place during our function? (i.e. Is there a rock band practicing in the next room during our prayer breakfast?)

What table decorations can the facility provide?

Do you have any pre-packaged theme decorations in house?

Is the room handicap accessible?

What time do we need to vacate the room? Are there any overtime charges?

What time will the tables be set up? What time can we decorate the tables?

How is leftover food disposed of? Can it be donated to a food bank?

Is there a minimum guarantee to use the facility? Is there a room-rental charge?

Are you a union facility? Is so, when is the contract up for renewal?

1. Is the cost of the meal inclusive of all service charges, gratuities, etc? Are the service charge and/or gratuity taxable? What other charges can I anticipate?
2. How many buffet tables will you set up? (Request one double-sided buffet for each 100 guests.)
3. Is salad dressing placed on the table or served by the wait staff?
4. What provision can be made for special meals? (vegan) How much advance notice is required?
5. What is the over-set policy? (The percentage of places set over the guarantee.)
6. What items can be made available on short notice if attendance increases unexpectedly?

**PRE-CON MEETING AGENDA**

Schedule a pre-con (pre-conference) meeting with the facility several days before your event. Your hotel contact will call together all the staff members that will be involved in supporting your event. Any special events or needs that you can discuss now will help your program go more smoothly. The facility will also have an agenda of questions for you. A typical agenda could include:

1. Introduction to the event:

 a. Who is sponsoring the event?

 b. Who will attend?

 c. Where will people come from?

 d. Why are they coming? What is the purpose of the event?

2. Daily program schedule

3. Shuttle buses: schedules, pickup and drop-off points.

4. Dietary preferences

5. Principal languages spoken by the group

6. Unusual demand for non-smoking rooms

7. Distribution of material. Are you authorizing anyone to distribute material to attendees’ rooms? If not, let the facility know that you do not approve.

8. What is charged to the master account?

9. Who is authorized to charge items to the master account?

10. Questions and answers

**XYZ Conference of Seventh-day Adventists**

**Event Summary: June 24-July 12, 2000**

Room: 122

Begin: 24 June 00 Time: 1400

End: 24 June 00 Time: 1600

Event: Seminar – Disciplining Teens

Setup: Theater 100; head table and lectern

AV: Microphone on head table

Phone: None

Keys: None

Notes: Ice water on head table

(This is a sample Event Summary or Meeting Resume. Prepare a page for each meeting room you are utilizing. If you plan to have different events in the same room during the same day, make a new page for each different function in the room. Include any and all information that will help the facility understand your needs for that space.)

**HELPFUL WEBSITES FOR MEETING PLANNERS**

*www.rcmaweb.com*

Official web page for the Religious Conference Management Association

*www.corbinball.com*

Comprehensive site on meeting planning and events technology with links to other helpful sites.

*www.meetingnews.com*

Meeting news magazine home page

*www.babelfish.altavista.com*

Translation assistance

*www.mapquest.com*

It provides your attendees with a map to their destination.

*www.oanda.com*

It is a good site for currency conversion if you are doing an international meeting.

*www.pcma.org*

Official web site of Professional Convention Management Association

*www.timeanddate.com*

Time in any part of the world

*www.iacvb.org*

Links you to hundreds of Convention and Visitor Bureaus

**SAMPLE** – Be sure to adapt this seminar evaluation to your meeting. Ask the questions that will be of use to you as you evaluate your event and make plans for the next one.

Make sure that everyone entering the room receives an evaluation blank to fill out and return at the end of the seminar.

**SEMINAR EVALUATION FORM**

Name of Seminar \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Excellent Good Fair Poor

1. Was the speaker’s presentation logical? 1 2 3 4

2. Was the material relevant? 1 2 3 4

3. Was the speaker articulate? 1 2 3 4

4. Did the material meet your needs? 1 2 3 4

Thank you for helping us to provide the best speakers and topics possible. If you have suggestions for other topics that you would like to hear, please indicate below:

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**EVALUATION FORM - XYZ CONFERENCE**

 Excellent Very Good Good Fair Poor

1. Overall 2002 Conference & Exhibition rating 5 4 3 2 1

2. Transportation from airport 5 4 3 2 1

3. Conference registration 5 4 3 2 1

4. Sightseeing Tour 5 4 3 2 1

5. Grand Reception 5 4 3 2 1

6. Opening general session 5 4 3 2 1

7. Expo ‘02 5 4 3 2 1

8. Wed. luncheon general session 5 4 3 2 1

9. Wed. evening dinner & entertainment 5 4 3 2 1

10. Thurs. breakfast general session 5 4 3 2 1

11. Thurs. luncheon general session 5 4 3 2 1

12. Thurs. evening reception & banquet 5 4 3 2 1

13. Friday breakfast & general session 5 4 3 2 1

14. Convention Center as a facility 5 4 3 2 1

15. Hotel (circle one): Marriott, Wyndham, Hyatt 5 4 3 2 1

16. Registration at hotel 5 4 3 2 1

17. Bus shuttles 5 4 3 2 1

18. Meals 5 4 3 2 1

19. Food service 5 4 3 2 1

20. City where conference held 5 4 3 2 1

21. How much time did you spend in the exhibit hall?

4-5 hours, 3-4 hours, 2-3 hours, 1-2 hours, 1 hour, none

22. How many seminars did you attend?

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23. Suggest topics for a tutorial at a future conference.

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24. Additional comments

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**Thank you for taking time to fill out this survey. We value your insight!**

Please drop survey in the boxes provided at the Registration Desk at the closing session.