**Organizing Retreats and Congresses**

**INTRODUCTION**

There have been many memorable meetings throughout history in the political and corporate arenas that receive wide publicity. We hear of peace talks between countries and large events to introduce new products for consumers. There are medical meetings and everyone has heard of the Olympics and other sporting events. Let’s take a moment and think of some very important meetings in the Bible.

Noah’s Ark was probably the first cruise ship meeting. It might qualify as a family reunion plus pets type of meeting, but it was a meeting nevertheless. Just be glad that your meeting doesn’t last for 40 days and 40 nights.

Moses was the champion of meeting planners. He had to plan the transportation out of Egypt, find camping sites for 40 years, keep thousands of people fed and otherwise happy, build a church, and countless other details. Fortunately for him, he learned to delegate tasks.

Who planned the Last Supper? Someone had to find appropriate space, make sure the room was set, and be sure the basins and water were ready. Who ordered the food?

I wonder if Martha knew she was a meeting planner? She had all the right ideas and was most hospitable. However, she did have a bit of a problem with volunteer recruitment.

Now think of your own experience. Have you ever had guests over for Sabbath lunch? Have you ever invited the whole extended family, all the grandparents, moms and dads, aunties and uncles, nieces and nephews, etc., to your house for a Christmas or a birthday party? Have you ever been in charge of a potluck at your church?

If you answered yes, then you have planned an event. Now all we have to do is add some programming, a couple hundred more people, audiovisual, a few hotel rooms, and presto! We have a meeting.

Meeting planning is like a puzzle. If someone hands you 500 puzzle pieces and asks you to put it together but does not give you a picture of what the puzzle should look like, it takes a while to figure out what’s going on. You don’t know if the various blue colored pieces are sky or water. You don’t know if the dark pieces are the ground or rocks on a mountain. But if they hand you 500 puzzle pieces and give you a picture of what to expect, it becomes much easier, doesn’t it?

Our purpose is to review the physical arrangements of planning your event. The programming is up to you. You know your objectives and what you want your attendees to learn. We will work through other aspects of the puzzle and what it takes to make your program work.

**PLEASE NOTE THAT IF YOU ARE NOT USING A HOTEL FOR YOUR RETREAT MUCH OF THIS MATERIAL STILL APPLIES TO THE PLANNING AND IMPLEMENTING OF RETREATS/CONGRESSES.**

Let’s get started on our puzzle.

**Definitions.** There are many different terms that can be used for meetings:

* **Retreat** – A period of time a group withdraws for prayer, meditation and study.
* **Congress** – A formal assembly, the act of coming together for a set purpose.
* **Convention** – A formal meeting of members, representatives or delegates.
* **Session** – A meeting to transact business.
* **Seminar** – A meeting for exchange of ideas.
* **Board Meeting** – A meeting of an organized body of administrators.

It doesn’t matter what we call it, the basics of organization for all meetings are the same. The difference is in the programming. To simplify our discussion, we will use the term “event” or “meeting.” For additional terms relating to event planning, see the handout “Terminology.”

**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. Are you bringing people together to pray or to play?
4. What do your want attendees to take away from their time together?
5. Who do you anticipate will attend? Teenagers, senior citizens, families, couples, or women only?
6. Are you working alone or with an organizing committee?

**Working with Committees.** Yes, you can do it all alone, but do you want to? A small active committee is much better than a huge committee that comes together once, makes a few decisions and then leaves all the work to you before, during, and after the event. Your organizing committee can give good input. Each committee member should have a specific role to fill in the planning and execution of the event. Make sure “job descriptions” are detailed so each person understands their responsibility and relationship to other committee members.

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

Now that you have determined your objectives and know who your audience is, it is time to outline your 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**

Now that we have thought through the goals and objectives for the meeting and we have an idea of whom we expect to attend, we need to begin thinking about what it will cost to meet those objectives.

While you will not know the cost of each item at this point, you must begin to make a checklist of every item that will be required to make your function a success. This will help you know what questions to ask when you start negotiating for a site and when you begin working with suppliers. For example, your list should include such items as hotel rate, cost of speakers, rooms and transportation for speakers and staff (don’t forget to include taxes), cost of decorations, audiovisual equipment, gifts to attendees and/or speakers, tips, meals, refreshment breaks, meeting room rental and set up charges, advertising, postage, staging, staff, etc.

Now begin to think about how you will finance the meeting. 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**

Now that you know your objectives and you have a feel for the program, and you have your budget checklist in hand, you are ready to find a place to hold your meeting.

If the main purpose of your event is to pray and meditate and gain a deeper understanding of God’s will for your life, than look for a facility that will enhance that experience for your group. The best fit for this group may not be a downtown hotel in a busy city.

If the group is coming together for recreational purposes, to swim, ski, or train for the next marathon, then look for a facility with those activities on site or close by. The main question you want to ask yourself is: Does this site meet the objectives and give the attendees the best experience for this event?

If you are holding the event in your own city, you probably have a good idea of what hotel or conference center can accommodate the size group you anticipate. Talk to the sales representative directly. If you are looking in another city, consider the Convention and Visitors Bureau (CVB) or other relevant organization in your country as your best partner in finding the perfect place for your event. (See the handout “10 Things You Need to Know About Convention and Visitors Bureaus.”)

**Request for Proposal.** Now is the time to begin preparing the all-important Request for Proposal (RFP). (See handout “Request for Proposal.”) Preparation of the RFP will force you to look at your plans carefully and put them in a format ready for a convention and visitor’s bureau or a hotel property to evaluate your piece of business. Make sure your RFP is clear, concise, and complete. Be as specific as possible.

**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?

**Hotel Rates**. Know the area you are considering. Schedule your meeting in off-season periods, if at all possible. Let’s talk just a moment about hotel rates. High season is when the hotel is busiest and people are willing to pay high rates. Shoulder rates are just before and after that peak high period for a hotel. The occupancy is lower because the snow isn’t as great, or whatever reason for that part of the country. Off-season is when no one wants to be there because the main attraction isn’t available, for example no snow on the mountain or too cold for the beach. Plan your meetings in those off season dates and you will find the hotels more willing to cut a deal to put heads on their beds. Flexibility in dates will give you flexibility in rates. If you know your attendees will not pay $200 a night, don’t request a proposal from a hotel that will not be able to meet your $75 a night budget.

**Reservations**. Once you have chosen the hotel for your event, determine how the guests will make their reservations. For small groups (up to 50), it is easy to prepare a rooming list. For larger groups the hotel can provide a reservation card that each individual sends directly to the hotel. If you are using multiple hotels in a city, talk to the CVB about utilizing their housing bureau to handle the hotel reservations. There may be a small charge for this service that will be incorporated into the room rate.

**Space.** Know and understand the space you need. You have outlined your program so you know how much space you will need for your plenary and breakout sessions. Outline this carefully and accurately for the hotel in your Request for Proposal. Don’t forget to request space for your registration area and if you need a staff room or office, now is the time to check on availability. Will you need exhibit space? Now is the time to request it. The hotel needs this information to be sure that your meeting will fit their space.

**Room Setups.** Did you know that the placement of tables, chairs, speakers and audiovisual can enhance or ruin the objectives of your meeting? Attendees should be as close to the presenter as possible. What else should you consider?

1. What is the focal point of the room? Is it the speaker or the projection screen? Be sure to provide clear sight lines to that focal point.
	1. Make sure your attendees are comfortable. Would you be comfortable if you had to twist around in your seat to see the speaker?
	2. Match the room setup to the message. Is the program interactive or lecture?

Let’s look at some typical room sets:

**Theater or Auditorium Seating:** For reasons of space and cost, theater seats are appropriate in many cases and maximize the seating in the room. It is good for lectures where extensive note taking is not required. In a chevron-style theater, rows are angled toward the stage or front of the room.

**Schoolroom:** Preferred for longer sessions and where a writing surface is needed. It requires more space than theater seating. A chevron-style classroom allows participants to see and connect with one another.

**Rounds:** Typical seating for meals. Usually set for 8-10 people.

**Crescents:** Round tables set with four or five chairs. It is space-intensive but appropriate where writing surface is required and participants need to interact in discussion periods.

**U or Hollow Square:** This is an excellent setup for small groups where everyone needs to see each other but it is very space consuming. Our overhead shows the U-shape. By placing tables at the open side it becomes a hollow square.

**Board or Conference Room:** An excellent setup for a small group. Allows everyone to be seen and heard and provides excellent interchange between participants.

To compare the seating capacity in these various styles of room sets, let’s look at this overhead. If we have a 2,000 square foot (186 square meters) room, you would be able to seat approximately the following depending on staging and audiovisual requirements:

 Theater seating 200

 Rounds 160

 School Room 130

 Crescents 80

 Hollow Square 50

Now that you have put your needs into writing in the form of a Request for Proposal (RFP), send it to the hotel(s) that you believe can handle your program. Or, send it to the Convention and Visitor’s Bureau in the city you are interested in. They will send it to facilities appropriate for your event.

When the proposals come in, evaluate them and determine which ones best fit the objectives of your event. You should have enough information to arrange for a personal site inspection to finalize your site.

**Site Inspection**. Many facilities have virtual site inspections on their web sites. Even a well-designed web site is no substitute for an in-person site inspection. Photographs do not tell the whole story inside the facility or the surroundings around the hotel. Prepare a check sheet of what you are looking for and don’t want to forget after your visit. (See handout, “Hotel/Site Inspection Check Sheet.”) On your walk through the facilities remember that no question is unimportant. Ask the following:

1. What other groups will be using the facility during our meetings? (This will help you know if there will be a rock band practicing next door to your prayer breakfast.)
2. What plans does the hotel (or facility) have for renovation? (You might not want to use this particular hotel if they are in the middle of major renovations during your event.)
3. What services are exclusive to the hotel? (Food and beverage is almost always an exclusive service. Audiovisual may or may not be.)

# Negotiation. Negotiation is not “You win, I lose.” Nor is it “My way or no way.” Real negotiation should be a win-win situation for both sides. It may take a while to do it, to lay your cards out on the table. Identify what you want as an outcome. You may find that your requests are received without further conversation.

# The basic rule of negotiation is: If you don’t ask, you won’t know if you can get it. Do you want a suite for your top-ranking officer? Ask. Do you need an extra complimentary room or two for your staff? Ask. Do you want a fruit basket in that suite when the occupant arrives? Ask. If you don’t ask, they probably won’t tell. If you don’t like the deal, walk away. There are other facilities that will want your business. Remember that sales people are trained to answer only what you ask. They won’t volunteer additional information, especially if it’s going to cost them something.

Let your salesperson know that you are inspecting several sites and will be making a recommendation to your organizing committee. Be open about when your committee will meet so that the hotel can pencil in your dates. But remember that you must make a decision when you say you will. You don’t have a signed contract, so the hotel may sell that space to another group while you go back and forth with your committee for the next six months

# Contracts. Review your contract carefully. Read every word. Understand what it says and what it means. After the contract is signed, you have to live with it. Make sure it accurately reflects what you want and need for your event. Get everything you negotiated in writing.

# Who will sign the contract? Are you authorized to sign contracts for your church or conference? If you sign as the principal, you are personally liable for performance. If you sign as an agent your acts are the responsibility of the principal as long as you were authorized to sign. If you signed as an agent but weren’t authorized, you become the principal. Very possibly the contract must be signed by someone who represents the legal corporation. If your organization does not stand behind a contract you sign, you will be personally liable when things go wrong.

**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 what 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.

Last-minute changes and requests can drive meeting planners crazy and raise stress levels. Do everything possible to avoid last-minute surprises. If your speakers do not return speaker information and audiovisual requirements, talk to them personally. Last-minute requests for unplanned audiovisual equipment can ruin your carefully planned budget.

Let’s take a look at some of the other little pieces of our puzzle.

**Food and Beverage**. The more you eat the happier the hotel is. The better you eat the happier your attendees are. Is it possible to keep both groups happy? Probably not 100%, but let’s look at some tips that might help.

Food at meetings needs to meet three requirements:

1. Satisfy attendees’ hunger

2. Provide the right nutrients that people need to stay alert.

3. Fulfill the hospitality role of effectively serving your guests.

In the area of food and beverage (F&B), it is extremely important to “know your group.” If you have an international group, keep in mind that over half the world prefers rice to potatoes. A teen-age group will prefer a different menu than you might serve to a group of ladies.

Before you start insisting on your favorite home menu, talk to the food and beverage manager. At some point, insist on talking to the chef to be sure he/she understands your needs. You may be surprised that he/she is quite knowledgeable about vegetarian cooking. They may come up with something that you never heard of but it sounds exciting, has a great presentation, and tastes wonderful. Doesn’t grilled vegetable strudel in phyllo dough nestled on a bed of rice with a base of tomato sauce sound better than those peanut butter and jelly sandwiches you were going to ask for! You may still have to explain the difference between lacto-ovo (eggs, milk and cheese are acceptable) and vegan (plant foods only), but there is much more acceptance of a vegetarian diet than there was several years ago. (See handout “20 Questions for Catering Managers.”)

What type of meal service fits your program needs?

**Plated meal**. If you have only a short lunch break, serve a plated meal. The salad, dessert course and beverage can already be on the table when you dismiss the morning meeting. Waiters need only serve the hot plate. Another advantage of the plated meal is you have total control over the menu and consumption.

**Buffet.** Do you want to provide choices and have time in the schedule? Serve buffet. Don’t expect a buffet to be less expensive than a plated meal. Remember the chef has to prepare approximately one-half more than the anticipated attendance because of waste. People have a tendency to try everything on the buffet table. You can control the cost by limiting the number of dishes you serve.

**Food -station buffet.** Food station buffets work well when you are trying to get the attendees to mingle and network. Limit the number of tables and chairs so that everyone can’t sit down at the same time. Cooked-to-order stations are a fun way to meet, greet, and eat. This type of food service may call for additional staff to keep the lines moving at popular stations. The idea of getting your stir-fried veggies made to order is appealing and lots of fun. This type of food service will require additional time in your schedule.

**Reception.** Instead of an evening sit-down meal, try a reception. If the reception replaces dinner, you will need 15-20 appetizers per person, but it’s a great way to get people to mingle since there are limited small tables and chairs.

Ask for proposals not menus. Be open with the catering director or your food service provider. Tell them what your budget is. Ask for three proposals in that budget range. Once you see what is proposed you can ask, “How can I fit this meal into my budget?” The chef will give you valuable input.

**Guarantees.** No one wants to run out of food. As the meeting planner you will be embarrassed if everyone is not served. Food service providers will generally prepare food for 5% more people than you guarantee. Your guarantee can be 5% under the actual anticipated meal count. If the meal or meals are included in the price of your registration, your guarantees are simple.

If you are meeting in an isolated location and there is no place to go, you can probably be pretty sure that 99% of your attendees are going to eat at the only food service around—yours. If you are meeting in an area where there are other restaurants, food courts, and other dining options, many of your attendees will want to try other food options after the first day. If the lunch break is very short, they may not have time to go to other eateries. Think about local attendance when you calculate meal guarantees. Will they eat breakfast with the group or at home? Will they stay for the evening function or go home to eat? What other events are going on during the meal break? How will they affect your meal counts?

If you need an accurate guarantee for a meal event such as a formal banquet, use a ticket exchange. The guests exchange their invitation for an actual ticket at registration. The deadline for ticket exchange can be set prior to the deadline for your banquet guarantee for the facility.

**Pre-Con Meeting.** Several days before the event begins, plan for a pre-con (pre-convention) meeting with the facility staff. Your convention services manager will call together the heads of various departments in the facility to go over your plans with you. This is an excellent opportunity to work out any last-minute concerns regarding your event before your attendees arrive. You should develop an agenda of things you want to be sure that the various departments know about your event. The facility will probably also come with their own agenda of questions for you to answer. (See handout, “Pre-Con Meeting Agenda.”)

**Meeting Resume.** How can you guarantee that your Convention Services Manager has understood everything you talked about leading up to your meeting? Try a detailed meeting resume. A day-by-day, hour-by-hour written detail of what you want when and where. You need to put into writing clear, concise instructions about one month before your event (depending on the size of the meeting). The hotel or facility will put your instructions into their format for their staff. One month gives them time to instruct their staff as to your event, what additional equipment may be needed, and finalize on which staff members will be assigned to your event. (See handout, “Event Summary — Meeting Resume Sample.”)

# Insurance. Be sure that your group and attendees are covered by insurance. Talk to your church treasurer and/or conference treasurer to find out what coverage is required. Do not assume anything.

**Registration**. Keep it simple, hassle free, fast, and easy. Ideally, your attendees will have pre-registered so that you know who is coming. Depending on the size of your group, set up several registration desks divided alphabetically to handle the crowd efficiently, don’t try to register 500 people at 3 p.m. at one table. Have packets made up and ready to go. Plan for one desk for on-site registrants, if needed, and problems such as badge corrections.

**Child Care.**  Are you providing childcare for the attendees? Know and understand the laws of your state regarding child care providers. How will you identify children? Will you charge for this service? What insurance coverage will be required? Do you have appropriate space for this activity?

**Websites.** Don’t forget about the internet as you plan your event. There are a multitude of sites that you can research for questions that you may have. (See handout “Helpful Websites for Meeting Planners.”)

**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.

This meeting can help you, as the planner, maximize the return on your investment by assessing whether a meeting reaches its goals and objectives. The post-con meeting will help you make informed decisions for your next event. There are several ways to do post-cons. Some planners use interviews; others utilize questionnaires. A combination of both is often the most successful.

There are several aspects to your post-con meeting. You will want to sit down with all your facility suppliers (hotel, convention center, etc.) to get their evaluation of the event. In the case of hotels or housing bureaus, be sure to get statistics of just how many rooms, room nights, and other business you did at that facility.

Get post-con information from your attendees. Develop a written evaluation form (see handouts, “Seminar Evaluation” and “Evaluation Form XYZ Conference”) that attendees can leave with you as the event ends. Don’t fall into the trap of thinking you can never improve your event. Weigh the information you receive carefully. Don’t change something just because two people didn’t like it—unless, of course, the criticism is valid.

Have a debriefing with your organizing committee. Review evaluation sheets filled out by attendees for the overall program and for individual seminars. List what went right and congratulate yourselves. List what went wrong and learn from your mistakes. Every meeting and venue is different. What works for one event may not work for the next one that you schedule in a different venue. But at least you have a background of what you don’t want to happen the next time around.

# CONCLUSION

We have touched only the highlights of what will help make your event successful. Every meeting you plan will get easier. Keep your planning files to aid you in successive events. Did you make mistakes? Probably. Most of us do. Did the people out front know about them? If not, then consider your event a success. Now it’s time to applaud your successful event!

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