INTRODUCTION

This toolkit outlines a set of industry suggested guidelines and best practices for meeting and event planning. Each event is unique, and this toolkit should be used as a general reference to help improve the quality and efficiency of your program. The content of this toolkit is not official UCOP policy.

Please reference right column for official UCOP Policies.

UCOP Policies relevant to events and meetings

http://www.ucop.edu/ucophome/policies/bfb/bfg.html

- G-28 Travel
- G-41 Non-cash awards
- G-42 Gifts
- G-43 University Membership in Organizations

http://www.ucop.edu/ucophome/policies/bfb/bfbbus.html

- BUS-34 Independent Consultants
- BUS-43 Materiel Management
- BUS-63 Insurance Requirements
- BUS-77 Independent Contractors
- BUS-79 Entertainment, Business Meetings
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PLANNING
Planning Your Event

Think about: date & time, location, number of attendees, purpose/reason, budget, atmosphere/mood, group history

- Have your objectives clear before you start planning.
- Plan ahead: In a year, what types of events or meeting does your department typically have? Develop an annual calendar.
- Use a checklist to plan your program.
- To establish a schedule for tasks, think about what you need to accomplish, then estimate the time that it will take, and work backwards from the date you have chosen for the event (*develop a reverse timeline*).
- What will be your measure of success for the event (e.g. achieved training, cost savings, positive feedback, number of participants)?
Planning Timeline

This timeline provides a checklist for your program. Adapt it to your own particular needs — establish your own “ideal” and “can’t-miss” due dates

12 months out
- Determine event goals and objectives
- Identify possible dates
- Prepare a preliminary agenda and guest list
- Prepare preliminary budget
- Prepare master schedule of all known printing requirements, including specific items, quantity, coding system, deadlines, and potential printers
- Conduct site visits as required
- Create checklists for all meeting segments and assign responsibility and completion dates
- Produce tentative exhibit floor plan
Planning Timeline

10 months out

- Select the most suitable venue and begin site negotiations
- Mail first meeting announcements, save the date cards, and promotional materials to prospective attendees
- Identify needs for outside suppliers
- Invite keynote speakers
- Determine preliminary food and beverage requirements
- Adjust exhibitor floor plan (becomes continuing task from this point on)
- Obtain audiovisual needs from speakers and presenters
- Review hotel/venue contract deadline dates
- Begin preparation of conference brochure, including copy, layout, and design
- Monitor the budget
Planning Timeline

8 months out

- Begin preparation of hotel function space diagrams for registration, general sessions, workshops, and social functions
- Negotiate transportation costs and availability
- Monitor budget
- Obtain biographies, headshots and introductions as each speaker is confirmed

4 months out

- Identify materials for registration packets; select and order conference packet
- Begin all food-and-beverage menu selections
- Order necessary on-site office furniture and equipment
- Mail second meeting promotional announcement potential attendees
- Monitor budget
- Establish risk management protocol
Planning Timeline

2 - 1 months out

- Mail attendees the agenda, suggested dress and other instructions
- Order gifts
- Confirm badge information
- Produce signage
- Review and confirm session schedule, room assignments, and function-room diagrams with facilities and appropriate outside suppliers
- Monitor budget
- Make final food and beverage schedule
- Prepare and print conference evaluation forms
# Planning Timeline

**At least 1 week before**

- Ship materials to arrive 24 hours before your arrival and confirm arrival before leaving. Verify return shipping.
- Confirm all audiovisual requirements.
- Confirm (72 hours in advance) your meal and beverage counts for the first day food functions.
- Brief staff on responsibilities.
- Arrange pre-conference meeting with the venue.
- Print roster, name tags, program, table tents and rooming list.
- Make sure you have relevant phone numbers and copies of the agenda and event information.
Planning Timeline

**On-Site**

- Personally inspect shipped materials to be sure all of your items have arrived and they are in good condition
- Review details and walk through your meeting space
- Supervise meeting on site
- Review each day's requirements, and highlight following day's requirements
- Keep track of all expenditures

**Post event review**

- Conduct a debrief with all staff involved noting things that went well, and areas for improvement
- Process all invoices and complete the final budget
SITE INSPECTION
Site Inspection Considerations

- To make a more informed decision on the suitability of a venue, a site inspection is usually required before booking.
- This is an important factor in choosing the right setting for your event.
- Conduct a physical tour of the venues you are interested in – don’t just rely on information from their website.
- Make an assessment – your needs vs. the venue’s offerings.
- Evaluate the venue’s Wi-Fi and internet bandwidth and infrastructure.
- Ask the venue if construction/renovation is planned - especially if you are planning an event 6 months out.
Site Inspection Considerations

Does it meet your requirements?

- Location & distance from airport/public transportation
- Service and quality of catering
- Appearance & accessibility (outside & inside)
- Room types, meeting spaces and capacity
- Amenities, services, special features and recreation facilities

Remember! Don’t compromise the basics:

1. Cleanliness
2. Convenience & accessibility
3. Attentive service
4. Quality catering
BUDGET
Budget – Department Approval

Prior to entering into any agreement, creating a Purchase Order or issuing a deposit – make sure you have department approval in place.

Required documentation:

- Department form or BRC ESG Template form
- FAU
- Department Code
- Signature **
- Budget (line item detail)
- Draft Agenda (if available)

** Note: Signing authority for department funds does not express the authority to enter into contracts on behalf of UC. All event contracts should be forwarded to BRC Yellow for signature coordination.
Every meeting is different, but the following guidelines can provide an idea of possible expenditures:

- **Site selection**: Travel & labor for site visits, RFP development, etc.
- **Staff & Speaker Costs**: Wages, honorariums, overtime and travel costs
- **Marketing**: Communication costs, advertisements, graphic design, registration fees, etc.
- **Printing**: Registration supplies, name badges, programs, agendas, signage, etc.
- **Venue Costs**: Food & beverage; sleeping rooms; audiovisual services; meeting room rental; decoration & exhibits; electrical; room set-up; handling fees
- **Other costs**: Office supplies, insurance, taxes, shipping, entertainment, gifts, etc.
Budget - Cost Saving Tips

- Be flexible with meeting dates – Peak season and week pattern greatly impact costs
- Choose a location that is central to the majority of attendees
- Go Green! Provide attendee materials online instead of printed handouts
- Use what’s there. Use the built-in audio system instead of renting an external setup
- Simplify. Sometimes the “wow” factor can be overrated
- Keep the total fee in mind
- Maximize speaker potential. Often a speaker can fill more than one role at a meeting
- Control travel costs. Choosing a speaker who is within driving distance of the venue will help the budget
- Opt for tried-and-true. Choosing a well-established off-site catering company for an event can be advantageous
CONTRACT NEGOTIATION
Contract Negotiation - Negotiation Techniques

The following general principles can be applied to negotiations for any site, service, or supplier.

Remember –

- Present and maintain a professional attitude
- Control stress and tension
- Avoid politics and egos
- Take time to gather all facts and requirements beforehand
- Meet with the proper hotel or site people who have the authority to make decisions

- Know the following “Do & Don’t” guidelines:
Contract Negotiations – Do’s

- Define the purpose and objectives
- Have printed copies of meeting plans available
- Make key contacts
- Follow up frequently
- Obtain peer referrals
- Communicate with clarity and outline everything in writing
- Make all agreements part of the written contract
- Possess the authority to make a decision (or sign a contract)
- Ask questions
- Listen and pay attention
- Know your budget
Contract Negotiations – Don’ts

- Sacrifice quality for cost
- Make unreasonable demands
- Be inconsiderate of a supplier’s profit margin and business needs
- Escalate and overestimate needs
- Hesitate to ask questions
- Be apprehensive about negotiating for everything required
- Promise what cannot be delivered
- Lie or misrepresent
- Jump at the first offer
- Pass up a good deal based on a personality conflict
- Be intimidated
- Hesitate to advise the facility of changes
Contract Negotiations – Useful Tips

- Waive meeting room rentals - If you choose to work with a F&B minimum or contract a block of rooms, meeting room rental can sometimes be waived.

- Get a walk clause - make sure the hotel is responsible for the costs of moving you and your attendees to another location if the hotel overbooks or sells your space to a larger client.

- Beware of the cancellation clause - work with the hotel to minimize penalties.

- Figure out the food and beverage minimums - these do not include gratuity or sales tax. If you do not meet your contracted minimum, you will owe the difference.

- Know the A/V options – If you choose to use the hotel A/V, be aware that gratuity and tax are charged on equipment rentals. Negotiate the ability to use outside AV without penalty.

- Lower your attrition rate – the difference between the actual used sleeping rooms and/or Food & Beverage and the “agreed to” in terms of the venue’s contract. Attrition is always negotiable.

- Leverage Hotel Sales managers – Hotel managers have monthly sales goals to meet; planners can try and leverage this fact.

- Get a construction clause – this will protect your event against construction or renovation delays.

BRC Event Services Group
FOOD AND BEVERAGE
Food & Beverage - Catering Checklist

The following checklist can be helpful to work out your catering requirements:

- What is the estimated attendance?
- Do any of your attendees have dietary requirements?
- What are the table linen color choices?
- Are centerpieces and decorations needed?
- Is a microphone needed? If so, what type and where?
- How much time is needed for set up?
- When will the room be accessible?
- Is a coat check room needed?
- Is entertainment/music planned?
- Is a rehearsal planned?
- Where are the restrooms?
EVENT MATERIALS
Event Materials - what you might need

- Invitations
- Programs
- Handouts
- A registration list
- Name badges/Tent Cards
- Promotional materials
- Website
- Signage
- Tickets
- Agenda
- Brochures
- Presentations
- Speaker Bios/Photos
- Seating diagrams
Green Meetings and Events

UC Commitment
The University of California is committed to minimizing its impact on the environment and reducing its dependence on non-renewable energy. Additionally, the University has set a goal of procuring 20% sustainable food products by the year 2020 for Campus Foodservice Operations.

It’s not just about being environmentally responsible - many of the minimum recommended guidelines can actually save money for the organizer.

Resources:
http://www.bluegreenmeetings.org/HostsAndPlanners/index.htm
http://www.calodging.com/energy_efficiency/
http://www.calrecycle.ca.gov/epp/greenlodging/
Green Events - Sustainable food and beverage

- Use pitchers of water; having guests pour the water when they want it
- Do not serve bottled water. Serve tap water at your events
- Use vendors who supply locally grown and purchased meat and produce
- Use fresh and seasonal produce, order organic food when possible
- Offer fair trade, shade grown, organic coffee
- Use washable or reusable serving utensils, beverage pitchers and serving dishes
- Use bulk dispensers for sugar, salt, pepper, cream, and other condiments
Green Event Guidelines

Destination & venue selection, transportation

- Select a venue closest to all meeting participants
- Chose a venue near an airport, a public transportation hub, or walking distance between multiple venues
- Have participants share cabs or commute together
- Choose a hotel that offers a linen reuse program and bulk dispensers for shampoos and soaps in guest suites
- Find out how green the city is
Green Guidelines

Practice the 3Rs: Reduction, Reuse and Recycling

- Ensure food and beverage packaging is recyclable, and that it will be recycled
- Create signage that can be reused in future events
- Consider eco-friendly design elements when designing your printed materials
- Print on recycled paper containing a minimum of 30% post-consumer waste
- Go paperless - provide jump drives with all pertinent information and create website for documents to be reviewed
- Communicate about and organize your event via electronic means to minimize paper wastage
- Look for caterers who supply organic and locally grown food
- Used potted plants instead of "cut flower" arrangements on tables
- Incorporate a volunteer or eco-logical activity into a meeting and offset the "carbon footprint" of the function
Contact Us

- Need to request event support? Just submit the online request form:
  http://www.ucop.edu/brc/documents/events_requestfrm.pdf

The BRC Event Services Group will respond to your request within two (2) business days to further discuss details and planning needs for your group.

- Check out the BRC ESG website for more information:
  http://www.ucop.edu/brc/planning.html