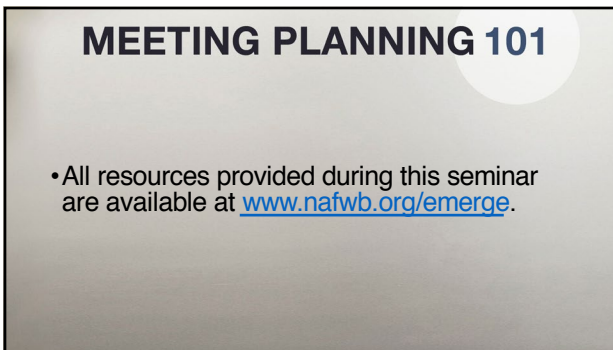




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MEETING PLANNING 101
Goal Setting

- What's the point?
- Purpose for your meeting
 - Education
 - Business
 - Worship
 - Tradeshow

4

MEETING PLANNING 101
Goal Setting

- Return on Investment (ROI)
- Clearly communicate goals

5

MEETING PLANNING 101
Goal Setting

- Things to consider
 - Locations of past meetings
 - Attendance
 - Room block pick up
 - Meeting rooms used

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MEETING PLANNING 101
Goal Setting

- Things to consider
 - F&B Requirements
 - Exhibit Space Needs
 - Special Event Needs

7

MEETING PLANNING 101
Goal Setting

- Aim High

...but be realistic

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MEETING PLANNING 101
Goal Setting

Event Profile

- Goals
- Objectives
- Who is coming? (Attendee Profile)

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MEETING PLANNING 101
Goal Setting

- Attendee Profile
 - Geographic Location
 - Age/gender of attendees
 - Will they want to bring family?
 - Interest and expectations
 - Special Needs

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MEETING PLANNING 101
Goal Setting

Event Profile

- Preferred dates
- Number & type of sleeping rooms
- Range of acceptable rates
- Meeting space required

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MEETING PLANNING 101
Goal Setting

Event Profile

- Tentative programming schedule
- Office/storage/registration needs
- F&B requirements
- A/V requirements

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MEETING PLANNING 101
Goal Setting

Event Profile

- List of wants and needs
- Historical data

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MEETING PLANNING 101
Goal Setting

Request for Proposal (RFP)

- What is my meeting worth?
- Key information about the group
- Overview of meeting (Event Profile)

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MEETING PLANNING 101
Goal Setting


Request for Proposal

- History of previous meeting(s)
- Range of dates (w/ flexibility?)
- Complete meeting specifications

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MEETING PLANNING 101

Goal Setting



2021 Free Will Request National Convention Request for Proposals

Introduction

The National Convention of the National Federation of Women Business and Professional Owners (NFWB) is an annual event that provides a unique opportunity for women business and professional owners to connect, learn, and grow. The convention is held in a beautiful location and features a variety of speakers, workshops, and networking opportunities. The convention is a must-attend event for all women business and professional owners.

Objectives

The 2021 Free Will Request National Convention will focus on the following objectives:

- To provide a platform for women business and professional owners to share their experiences and insights.
- To provide a platform for women business and professional owners to learn from experts in their field.
- To provide a platform for women business and professional owners to network and build relationships.
- To provide a platform for women business and professional owners to showcase their businesses and services.

Methods

The following methods will be used to achieve the objectives of the convention:

- Keynote speeches by industry leaders.
- Workshops and seminars on various topics.
- Panel discussions with experts in the field.
- Networking opportunities throughout the convention.
- Exhibitor booths for women business and professional owners.

Results

The 2021 Free Will Request National Convention is expected to result in the following outcomes:

- Increased awareness of the NFWB and its mission.
- Increased networking and relationship building among women business and professional owners.
- Increased knowledge and skills among women business and professional owners.
- Increased visibility for women business and professional owners.

Free Will Request National Convention

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MEETING PLANNING 101

Goal Setting



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Free Will Request National Convention

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MEETING PLANNING 101

Goal Setting



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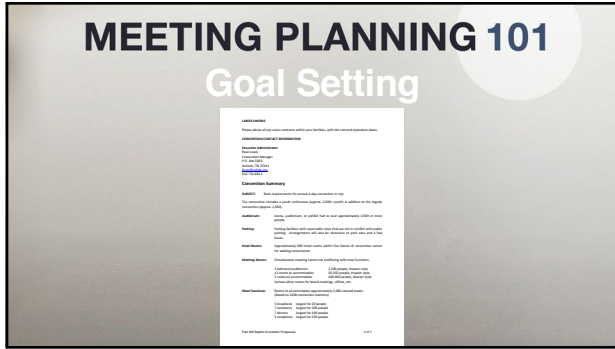
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Free Will Request National Convention

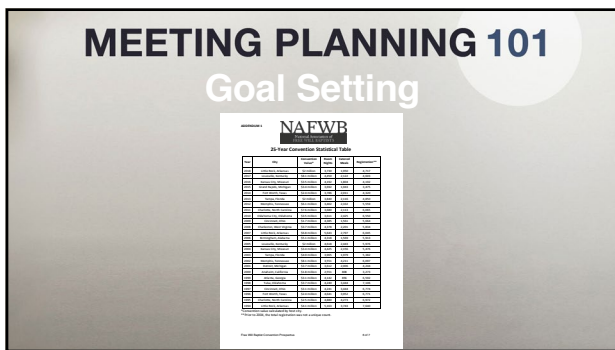
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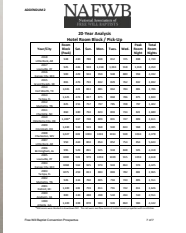


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MEETING PLANNING 101
Goal Setting



The image shows a budget worksheet for NAFWR. The title is 'NAFWR 2019-2020 Budget Worksheet'. It features a grid with columns for 'Account', 'Budgeted', 'Actual', and 'Variance'. The rows are organized into sections: 'Operating Expenses', 'Capital Expenses', and 'Total'. The 'Operating Expenses' section includes categories like 'Advertising', 'Travel', 'Printing', 'Postage', 'Telephone', 'Utilities', 'Repairs', 'Insurance', 'Professional Fees', 'Miscellaneous', and 'Total Operating Expenses'. The 'Capital Expenses' section includes 'Equipment', 'Furniture', and 'Total Capital Expenses'. The 'Total' section includes 'Total Budgeted', 'Total Actual', and 'Total Variance'.

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MEETING PLANNING 101
Site Selection

- Where to begin?
 - Local CVB
 - Trade Publications
 - National Sales
 - Peer Referrals
 - Web

23

MEETING PLANNING 101
Site Selection

- Types/locations of venues
 - Metro area
 - Suburb
 - Airport area
 - Resort/Conference Center
 - Hotel
 - Convention Center

24

MEETING PLANNING 101
Site Selection

- Plan a site visit
 - Consider all aspects
 - Customize your visit
 - See what can't be shown on paper

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MEETING PLANNING 101
Site Selection

- During site visit – have a check list
 - Easy access via flight? Drive?
 - Local Transportation
 - Parking options
 - Meeting space

26

MEETING PLANNING 101
Site Selection

- During site visit
 - Equipment included in set up
 - Labor union regulations
 - Overlapping meetings/events

27

MEETING PLANNING 101
Site Selection

- During site visit
 - See *all* hotel room types
 - Catering options
 - Upcoming renovation/remodeling
 - Ask **lots** of questions

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MEETING PLANNING 101
Site Selection

- Final selection
 - Eliminate proposals that do not work
 - Be logical, not emotional
 - Site comparisons with checklist
 - First right of refusal / tentative hold

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MEETING PLANNING 101
Contract

- Build a relationship
- Communicate
 - Needs, wants, expectations
 - Must have, would like, can do without

30

MEETING PLANNING 101
Contract

- Negotiable
 - Guest room rates
 - Complimentary rooms
 - Parking
 - Commissions or rebates
 - Reservation procedures/policies

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MEETING PLANNING 101
Contract

- Negotiable
 - Meeting room rental and set up fees
 - F&B prices
 - AV options
 - Attrition
 - Indemnification

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MEETING PLANNING 101
Contract

- Non-negotiable
 - Gratuities
 - Service Charge
 - Tax
 - Insurance

33

MEETING PLANNING 101
Contract

- Terms & Conditions
 - Event Details
 - Sleeping Rooms
 - Meeting space
 - F&B Functions

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MEETING PLANNING 101
Contract

- Terms & Conditions
 - Concessions
 - Vendors – exclusive or options
 - Billing/payment methods
 - Cancellation clauses

35

MEETING PLANNING 101
Contract

- Terms & Conditions
 - Indemnification
 - Insurance
 - Dispute resolution

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MEETING PLANNING 101
Contract

- Best Practices
 - Honest, up-front approach
 - Trust/relationship building
 - GET IT IN WRITING
 - If you aren't sure—ASK!
 - Read what you sign—ALL OF IT!

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MEETING PLANNING 101
Budgeting

- Most challenging aspect
- Most important planning factor

38

MEETING PLANNING 101
Budgeting

- Goals/Objectives
 - Profit-oriented
 - Break-even
 - Charitable
 - Lose money

39

MEETING PLANNING 101
Budgeting

- Budget Categories
 - Indirect Costs
 - Fixed Costs
 - Variable Costs

40

MEETING PLANNING 101
Budgeting

- Budget Challenges
 - Who writes it?
 - Who determines priorities?
 - What is missing?
 - When is it prepared & approved?
 - Who has authorization to change it?

41

MEETING PLANNING 101
Budgeting

- Budget Tips
 - Good projections
 - Inflate it
 - Find easy reductions/savings
 - Ask the venue

42

MEETING PLANNING 101
Budgeting

- Budget Items - Income
 - Registrations
 - Guest tours
 - Ticketed events
 - Exhibit booths

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MEETING PLANNING 101
Budgeting

- Budget Items - Income
 - Sponsorships
 - Grants
 - Ad sales
 - Program proceedings

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MEETING PLANNING 101
Budgeting

- Budget Items - Expenses
 - Staffing costs
 - Overhead
 - Legal Fees
 - Insurance

45

MEETING PLANNING 101
Budgeting

- Budget Items - Expenses
 - Site selection costs
 - Meeting space rental
 - AV Services
 - Speakers

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MEETING PLANNING 101
Budgeting

- Budget Items - Expenses
 - F&B costs
 - Board, other VIPs
 - Printing/publications
 - Promotion

47

MEETING PLANNING 101
Budgeting

- Budget Items - Expenses
 - Equipment rental
 - Registration
 - Production
 - Photography/Videography

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MEETING PLANNING 101
Budgeting

- Budget Items - Expenses
 - Special Events
 - Awards
 - Transportation
 - And...
 - MISCELLANEOUS

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MEETING PLANNING 101
Staffing

- Paid Office Staff
 - Organizational chart
 - Manage specific areas

50

MEETING PLANNING 101
Staffing

- Volunteers
 - Set forth guidelines
 - Recruit for Plan A

51

MEETING PLANNING 101
Staffing

- Learning/Internship Component
 - Incorporate college students
 - Not just grunt workers
 - Provide meaningful outcomes

52

MEETING PLANNING 101
Staffing

- Understand roles
- Provide measures of thanks

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MEETING PLANNING 101
Logistics

- Clear communication process
- Set a timeline with the facility
- Information overload
- PUT IT IN WRITING

54

MEETING PLANNING 101
Logistics

- Set Up Sheet
 - Name of Event
 - Day/Date
 - Start/end time
 - Location

55

MEETING PLANNING 101
Logistics

- Set Up Sheet
 - Set up of the room
 - Any F&B involved
 - AV Needs
 - Any other pertinent information

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MEETING PLANNING 101
Logistics



57

MEETING PLANNING 101
Logistics

- Submit set up sheets *well* in advance
- Venue will formulate **BEOs**
- Create **Event Specifications Guide**

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MEETING PLANNING 101
Logistics

- Final pre-con meetings
 - Patterns
 - Review BEOs
 - Communication Process
 - Authorized decision makers

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MEETING PLANNING 101

Questions?

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**MEETING
PLANNING 101**

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