

Events 101



SouthAlabama.edu

Introduction to USA Events 101

Many years ago we fell in complete love with events management. For us, Events were a unique opportunity to explore our creativity, project management, communication, and people skills.

A career in events management has afforded us the opportunity to work alongside dedicated, generous and giving people, travel extensively, and yes even meet a few dignitaries along the way. After years in this profession, we consider ourselves still in the honeymoon phase of our relationship with Events.

In the Office of Special Events we recognize that for many of you managing an event is an ‘add on’ to an already overcommitted work load.

We have written this guide to begin to take some of the ‘pain’ out of planning. Expect that this guide will continue to grow as we hear more about what you need to be successful in your event planning endeavors. As you build your own relationship with events management, we would love to hear from you at specialevents@southalabama.edu.

Happy Planning!
USA Office of Special Events

Conduct a site visit for an external venue

USA employees are strongly encouraged to use on-campus venues to host events.

However, we recognize that on occasion offsite locations may have greater availability or amenities that are currently not available on campus. When considering an offsite venue, we encourage you to download our site visit checklist form or print the site visit checklist attachment. This site visit checklist form is a generic template that can apply to multiple types of events. If you would like a template created for your specific event, please contact the [special events team \(OSE\)](#) for further assistance.

After completing a site visit, consider these five next steps:

Develop a budget for the venues you're most interested in to verify that you have the available funds to support your venue choice. If you are not a budget owner, please speak with the financial manager within your office to receive prior approvals.

- If necessary, meet with your event planning committee to discuss and agree on a final venue choice.
- Request a contract from the venue to conduct a preliminary review before submitting it to legal.
- Inform the properties you are no longer considering. While this is not a requirement, it is our experience that following up with properties that you are not going to work with is a great way to close a professional relationship.
- Schedule planning meetings as the contract is being reviewed.

Create an event checklist

Overview

Is this you? While working on a new initiative for your department, someone brings up the idea of an event. Intuitively you know that an event makes sense but are a little concerned about the amount of work it will require for this event to be well executed. Below is one way to consider building your event checklist. Included are some guiding questions and a sample event checklist. Happy planning!

Key Considerations: Before outlining an event checklist, here are a few important questions to address with your colleagues.

What is the purpose of this event?

Events require a decent amount of effort. Therefore, before you or your division commits to hosting an event, you should have a clear understanding of why the event is important and develop a solid business case. As an example, here are a few strong reasons to host an event:

- We need to showcase new research or an initiative to community members.
- We need to cultivate new donors.
- We need to highlight an achievement of a department, person, etc.
- We desire deeper community engagement.

A less favorable response to the question about event purpose is “we hosted (x) event last year.” If this is the response to the first question, we encourage you to make sure that you are not hosting a tradition without a specific purpose.

What are the budget parameters?

Equally important to outlining the event purpose is having a clear understanding about how the event will be funded in advance. If you do not have sufficient funds to host the event, you are encouraged to delay hosting the event until the proper financial resources are made available.

Who must attend the event?

After you have a clear purpose and commitment of financial resources, it is important to identify who must attend this event and get a sense of schedule conflicts for key administrators and external guests. We encourage you to do this on the front end because you will need your event date in order to build your event checklist.

At the conclusion of the event, how will we define success?

Many people neglect this step in an effort to rush through the planning process. We encourage you to take a brief moment to decide what a successful event looks like because without this information it is difficult to evaluate whether or not you should continue this event in the future.

Who needs to be involved in the planning?

A solid event checklist will involve the owners (meaning the person(s) responsible) for components of the overall plan. You will want to make sure that all of the owners (and, if necessary, managers) understand their role and have agreed to the time commitment associated with a particular activity.

Event Checklist Sample

We recognize that there are a lot of events management/project plan software such as Microsoft Project, Basecamp, and Smartsheet; however, we suggest that you format the table below in an Excel spreadsheet. Before you look at samples, let's discuss the categories for your event checklist.

- Task** – This is the specific deliverable related to the event. You are encouraged to provide as much detail as necessary for the success of the project.
- Owner** – Refers to the individual who is directly responsible for making sure that the task is accomplished by the due date.
- Collaborator** – Refers to the individual(s) who need/should be involved with the specific deliverable.
- Due date** – Deadline for the deliverable.

Status – We recommend that you use a red, green, yellow status bar.

Red task is severely off deadline and requires immediate support.

Yellow task is on track with maybe one item that needs support.

Green task is on target for completion by the due date.

Alternatively, you can use the words “On Track,” “Delayed,” and “In Progress” to communicate these same details.

- **Special notes** – This column should be used to document anything critical to the task. This may include new information, rationale for a delay, or notes from a conversation.

Negotiate a hotel contract for a conference

Important note:

The following section does not replace the contract review process from the USA Attorney's office. The formal review process from the USA Attorney's office must be followed. This section provides tips on how to review a conference contract from an event planning/logistics perspective.

In order to understand how to review a contract from a hotel venue, it is important to have a high level understanding of hotelier's financial model. Generally speaking, a hotel's financial model relies heavily on guest room revenue. As a result, the most competitive contracts are when the number of guest rooms exceeds the amount of meeting space a conference requires. Unfortunately, the ideal scenario rarely occurs. As a result, it is important for planners to approach conference contracts with the expectation of achieving baseline requirements within each individual clause. When reviewing a hotel contract, here are the most important noteworthy clauses.

Room Block:

Generally speaking a room block appears within the contract in a grid/table format that outlines the complete lodging commitment including room type, dates of stay, rate, and total guest nights. As an example, the room block might look like this:

ROOM TYPE	RATE	DAY ONE	DAY TWO	DAY THREE	DAY FOUR	TOTALS
King Room	\$159	10	10	10	Checkout will often appear as "C/O"	30
Suite	\$259	5	5	5	Checkout	15
Total guest room nights contracted						45

In this example, the grid is telling you that 10 people are staying for three nights in standard king rooms and that five people are staying in suites for three nights.

Guest Room Attrition:

This clause builds from the guest room grid above. In short, guest room attrition is the host organization's commitment of how many hotel rooms they are "guaranteeing" they will sell or occupy over the course of their event. The standard attrition clause across the country is an 80% commitment. When and if a hotel requests a higher commitment, you are encouraged to request that they use a standard clause of 80%.

As an example, if the above grid was included in a contract, the host organization would be required to have a total of 36 guest room nights.

When the host organization does not meet their room block, financial penalties will apply. Therefore, it is very important that the host organization strongly considers their event's historical data before agreeing to a room block commitment.

Cut-Off dates:

In all hotel contracts, they will suggest a "cut-off date" which specifies when your negotiated discounted rate will no longer apply. Hotels include this cut-off date because they want to resell any unused rooms from your hotel block, usually at a higher rate. Again, for hotels, guest room revenue matters significantly. Depending on the history of your conference, you are encouraged to agree to a cut-off date that is not earlier than three weeks prior to your event start date.

Food and Beverage Attrition:

Similar to guest rooms, food and beverage revenue requires a financial commitment that hotels develop based on what you tell them you are going to serve during your event as outlined in your Request for Proposal (RFP). In the example grid below, the numbers are generic estimates and should not be used as a basis for budget planning.

DATE	MEAL	PER PERSON COST
Day One	Continental Breakfast	\$10
Day Two	Continental Breakfast and Lunch	\$20
Day Three	Hot Breakfast Buffet	\$15
Total per person cost		\$45

Let's assume that the per person cost is \$45 for 200 guests. The hotel would likely propose that your food and beverage commitment be \$9-\$11K++. The (++) is used to indicate tax and gratuity.

In order to verify that food and beverage commitment is accurate, request current catering menus from the hotel to calculate your estimated catering expense using real data.

Generally speaking, when you meet your food and beverage attrition clause, you are not charged for meeting space associated with conferences. Similar to guest room attrition, when you do not meet your food and beverage attrition commitment, a financial penalty will apply.

Concessions:

On occasion, venues will offer concessions based on what they think is important to you and your group as outlined in your RFP. Traditional concessions include catering discounts, audio/visual discounts, and complimentary internet. Talk with your event planning group to identify which concessions are non-negotiables for the event.

Negotiate a hotel or venue contract for a catered only function

Important note:

The following section does not replace the contract review process from the USA Attorney's office. The formal review process from the USA Attorney's office must be followed. This section provides tips on how to review a social function contract from an event planning/logistics perspective.

Negotiating a hotel or venue contract for a catered function has fewer clauses and areas for the host organization to incur multiple penalties. However, it is not uncommon for those working on social functions to experience "sticker shock" at the completion of the event because they did not ask critical questions in advance.

When negotiating a social function event contract, the following approach can help the host organization or department gain a comprehensive understanding of a venue's potential ancillary expenses.

Here are the five important questions to ask during the preliminary contract review process:

1. What are all of the venue fees, including, but not limited to: labor, décor, and rentals?
2. What, if any, charges apply for event set up or tear down time? As a general rule venues will allow two hours for set up and two hours for tear down time without penalty.
3. What, if any, charges apply for events that occur during non-traditional hours?
4. For venues that do not have in-house caterers, what are the charges associated with using one of their preferred caterers?
5. For venues that do not have in-house production, what are the charges associated for production?

Let's look at a few examples of potential contract scenarios:

For a venue that does not have an in-house caterer or production company, you will want to:

- Verify all event set up and tear down times.
- Verify that they have a list of preferred caterers and that you are not required to get an additional special event license to host the event. Before committing to a contract, request a preliminary quote to verify that your budget can support this cost.
- Verify if there are any additional fees for "their staff" to be at the event despite the fact that you will need to hire your own staff.

For a venue that does have an in-house caterer and/or production company, you will want to:

- Understand your food and beverage commitment. Before committing to a contract, request a preliminary quote to verify that your budget can support this cost.
- Attempt to get the event space complimentary or at a reduced rate. Specifically, ask the question, "What is the published rate for this space?"
- Verify event set up and tear down times. This is important because many venues will overbook their rooms forcing your event to feel rushed.
- Verify the actual cost for production. Before committing to a contract, request a preliminary quote to verify that your budget can support this cost.

Venue Request for Proposal (RFP)

The Office of Special Events encourages you to thoroughly check all on-campus options before pursuing an external venue.

When sourcing venues you can use a similar method as the programmatic session review process known as the Request for Proposal (RFP). RFP's are often used to source conferences or venues with a high number of guests.

On the rare occasion that you need an offsite venue, here is a sample RFP for you to work from. If you need assistance building a custom RFP, please [contact us](#).

Once your RFP is completed, the best way to begin your search is to use the services of a Convention and Visitors Bureau (CVB.) Here are some links to nearby CVB's.

[Atlanta](#)

[Mobile](#)

[New Orleans](#)

How to create an event budget

Event budgets are a critical tool to hold departments and individuals accountable for expenditures.

The following table outlines all of the categories to consider when building an event budget, as well as a few cost estimates to get you started. As you build your budget, you may delete some of these categories but at least you will know that you have thought through everything.

POTENTIAL BUDGET LINE ITEMS – IN ALPHABETICAL ORDER	WHAT YOU CAN EXPECT – ESTIMATES ONLY
Audio/visual/technology/production – projection, staging, lights, labor, cyber café, tent	This will be one of your highest line items, especially when using an offsite or outdoor venue. Expect to spend thousands.
Assessment – evaluator, copies of survey, labor to analyze survey, etc.	
Catering – breakfast, lunch, dinner, snacks, coffee breaks, receptions, labor, and offsite meals	Continental breakfast average: \$7 to \$9++ per person Hot breakfast average: \$10 to \$12++ per person Lunch average: \$12 - \$15++ per person <i>Note: These prices reflect current Aramark pricing. If using an offsite venue, please expect to budget for a higher per person expense.</i>
Entertainment	Consider using some of our great internal talent if they are available before outsourcing.
Gifts – thank you to speakers, donors, participants, and others	
Gratuity/service charges	Generally 21-24%, in addition to the overall bill. Tax exemption does not exempt you from paying a gratuity
Hotel rooms – nightly rate	Per Statista, the average lodging rate in Mobile, AL as of 2015 is \$120. However, depending on the needs of your program, you will find lodging can be both cheaper and more expensive. Find USA discounted rates by visiting, southalabama.edu/departments/studentaffairs/employeediscounts/motelrates.html

POTENTIAL BUDGET LINE ITEMS – IN ALPHABETICAL ORDER	WHAT YOU CAN EXPECT – ESTIMATES ONLY
Onsite event marketing – signage, banners, programs, place cards, tent cards, menu tickets, name badges, handouts, etc.	This can be a great opportunity to save money if your marketing strategy will allow for a robust virtual program.
Post-event marketing – postcards, mailings, thank you notes, etc.	
Pre-event marketing – postcards, mailings, poster, design support, video	
Reimbursement – mileage per the IRS rates, contractual stipulations with a presenter	
Revenue – ticket sales, concert fees, ad donations, individual contributions, etc.	This should appear at the top of your budget. Any expenses should be subtracted from your revenue. The ideal scenario is for your revenue to cover your expenses fully.

How to create an event survey

Does this sound familiar?

You recently had a fabulous event. Everything started on time and, in your opinion, the food and programming was great. Attendance was down, but you believe that things will eventually pick up. Besides, you have been doing this event for 10 years so there is no need to overthink and reinvent the wheel, right?

Actually, this is not the best way to approach your event. While your long-standing or recent event may be great, you really won't know if it's relevant or innovative if you do not create an event survey. As you build your event survey, here are some things to consider.

- Develop a concise but meaningful survey. It has been our experience that long surveys simply do not get answered. Strive to keep your survey 10 questions or less.
- Connect the survey to the event's purpose. Even if your event has been going on for years without a survey now is a great time to ask yourself and/or your event planning group, "Why are we doing this event"? What is the purpose? Once you ask these questions, your survey can be designed in such a way to see if the purpose is being met.
- Write a personal survey invitation. When you invite people to complete your survey, inform them of the benefits of completing the survey. Also, it is great to highlight if the survey is brief and the answers confidential.
- Only ask questions where participant feedback matters. For example if you know the event date for whatever reason cannot change, then do not ask participants about their preferred event date. Instead, you may want to focus your questions on the event length or quality of speakers.
- Discuss and reflect on the feedback. As soon as you know you are doing a survey, schedule a meeting with your event planning group to go over the survey results to make decisions about next year's program.

Currently, OSE uses [surveymonkey](#) as our evaluation tool. Here are some of our recent surveys. We applaud you for being open to improvement with your department or division's events.

How to reduce event cost

Events can be beautiful, inspiring, and meaningful without “breaking the bank.”

Below are a few simple tips to help your department and division save funds with your events. If you have a tip that has helped you, email us so we can include your advice on this page.

- Don't host events that are not currently included in your budget.
- When possible, host events on campus – it has been our experience that going offsite can result in some expenses doubling. As an example, on campus lunch can range from \$10-15 per person, as opposed to lunch at downtown Mobile hotels which start at \$28++ per person.
- Have an event decorating day – rather than outsourcing florals, perhaps you and your team can get together and create centerpieces one day over lunch or in the afternoon.
- Use USA Publications for design service – Publications charges departments \$48 per hour for design. Established external designers can charge \$75 per hour for design.
- Conservatively order catering – many events have food left over after the function. Use your past history as a true gauge of how much food you actually need to order. Also, if budget isn't a concern, keep in mind that any unused food is thrown in the trash; consider ordering conservatively to avoid waste.
- Use internal musical talent when availability permits.
- When possible, try to get products donated.
- When possible create a small revenue stream to offset cost; for instance, when designing a conference, can you charge local businesses a small fee to put an advertisement in your program book?
- Conservatively print – if you need to reduce cost, stay away from requesting custom sizes, color prints, or other high end finishes.
- Invest in items that you use frequently – if your event uses centerpieces, uniforms, t-shirts, technology, etc., buy in bulk so you will have them for years to come versus paying a per use cost.

How to create an event production schedule

An event production schedule is an account of all of the activities associated with an event.

We recommend that you use this template for complex events to encourage shared accountability for the project's success. Below is our suggestion of information to include. Keep in mind that your production schedule will likely be used to complete any Banquet Event Orders (BEOs). Your event is not finalized until your BEOs are reviewed and signed.



DATE



TIME



ACTIVITY



SPACE

Catering – Within this column feel free to be as detailed as necessary. Over communication is better than operating with assumptions. Our example outlines the menus.

Audio/Visual – Over the course of an event audio/visual can change. Attention to detail is critical within this document but especially here to avoid events marred by bad sound quality, microphone issues, etc.

Additionally, you could add:

Special Notes:

If you have a VIP guest, special dietary note, or other things you want the entire group to know, feel free to use this column.

Owners:

Our example uses the activity column for names but some people prefer to include a separate column and include the name of the person responsible so that this information is highly visible.