



Meeting Logistics – Part 1 Steps for Successful Event Planning

**Thursday, August 25, 2011
2:00 p.m. – 3:30 p.m. Central Time**

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Principles & Practices for ANY Size Program

Before, During and After:
Working with the property

Before:
Budgeting, Site Selection and Contracting

During:
Food and Beverage, Audio Visual and Room-Set-Ups

After:
Paying Bills and Saying Thanks

Before, During and After *Working with the Property*

The Players:
Before: *Sales Manager*
During: *Convention Services Manager*
After: *Billing Manager*

BEFORE:

***Budgeting, Site Selection &
Contracting***

BUDGETING

Building The Budget

You may categorize your expenses by their different functions:

*Direct Costs
Fixed Costs
Variable Costs*

With these definitions in mind, you can use a break-even formula to determine your meeting budget...

The Formula

BEU = Break Even Units = Number of Attendees

VC = Variable Costs

TFC = Total Fixed Costs

CF= Contribution Margin (Registration Fee - VC)

$$\text{BEU} = \frac{\text{TFC}}{\text{CF}}$$

***To make a profit, add the desired profit dollar amount to the TFC in the above equation.*



Formula Example

BEU = X Attendees

VC = \$100 per attendee

TFC = \$5000.00

CF= Contribution Margin: Registration Fee (300.00) – VC (\$100.00)

$$X = \frac{5000}{300-100} = X \text{ is 25 attendees!}$$



Income Items (*Just a few examples*):

Registration Fees

Sponsorships

Exhibit Booth Sales

Guest Tour Fees



Expense Items (*Just a few examples*):

Space/Facility Rental
Speakers
Food and Beverage
AV Services
Gratuities
Print Material Production
Postage
Advertising Costs
Shipping
Bank Charges
Registration Booths
Photography
Legal Fees
Signs



SITE SELECTION



The Eight Steps of Site Selection:

- Identify Meeting Objectives*
- Gather Historical Data*
- Determine Physical Requirements*
- Consider Attendee Interests*
- Select an Area and Type of Facility*
- Prepare Meeting Specs and an RFP*
- Review and Evaluate Options*
- Select the Site*



Identify Meeting Objectives:

The meetings objectives will help determine the proper setting.

Gather Historical Data:

Dates, size and location of past events, Food and beverage spending, Financial performance, Sleeping room pick-up

Determine Physical Requirements:

Preferred dates, Attendance, Meeting Space, Food and Beverage, Exhibits, Registration, Site Inspection Requirements, Sleeping Rooms

Consider Attendee Interests:

What are the ages of the participants? Are nearby shopping/restaurants expected? Will there be social/networking opportunities?



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Select an Area and Type of Facility:

Consider travel convenience, cost, accessibility, etc. when narrowing down your selection

Prepare Meeting Specs and an RFP:

Contact Information, Purpose of the event, Information about the attendees, Preferred dates, Number, size & use of meeting rooms, Range of acceptable rates, Number/Types of food functions, Complimentary requirements, Next steps (who, how, when), Number/type of guest rooms required

Review and Evaluate Options:

Review, Compare, Assess, Inspect

Select the Site:

Decide, Communicate, Contract!



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CONTRACTING

What makes a contract legal?

Offer
Acceptance
Consideration
In Writing
Legally Competent Parties

A contract should include:

Meeting Space
Concessions
Payment Procedure/Credit
Catering Requirements
Contact Information
Sleeping Rooms
Room Block Control and Liability
Contract Management Issues
Closing

Clauses

Attrition
Acts of God
Cancellation
Force Majeure
Indemnification

DURING

***Room Sets, Food & Beverage
and Audio Visual***

ROOM SETS

Function Types

General Session

Break Outs

Registration

Exhibits

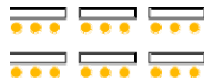
Storage

Miscellaneous

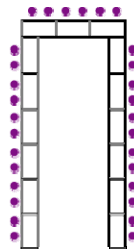
Facility Equipment

Tables
Chairs
Podiums, Lecterns and Head Tables
Miscellaneous Equipment

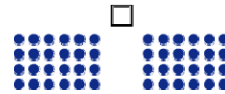
Meeting Room Set-Ups



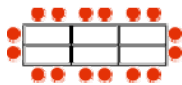
Classroom



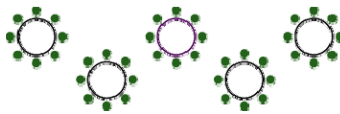
U-Shape



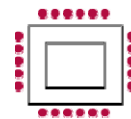
Theatre



Conference



Banquet



Hollow Square



FOOD AND BEVERAGE



Planning the Menu

Considerations

Nutrition

Allergies and Food Restrictions

Politics of Food

Other Considerations

Service

Types of Service
Standard Service Ratios
Supervision
Set Over Guarantee
Cocktail Servers

Determining Costs

Built-In Costs
Guaranteed Pricing
Plus-Plus
Surcharges on smaller meetings

Cost Saving Ideas

Use Local Foods
Ganging Menus
Substitutions
Small Servings of high-end items
Limit Portion Size
Pass the Food

Beverage

Alcohol
Purchasing Options
Liquor Liability Safeguards

AUDIO-VISUAL

Equipment

Microphones
Speaker Systems
Computer Equipment/Presentation Software
Video Projection
Projection Screens
Recording Equipment
Display Devices

Planning the Show

Capacities
Ceiling Heights and Hang Points
Access Times
Plan for Back Up
Crew Rules

AFTER
Paying the Bills and Giving Thanks

Gratuities

Tipping – Who and Why
General Guidelines
Distribution

Paying The Bills

Review
Back-Up
Timely Payment



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FORMULAS



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Appendix A: Function Room Set-Up Formulas

Reception: 9-10 sq. ft. Per person (standard bar/hors d'oeuvres)

Theatre: Less Than 60 People = 12-13 sq. ft. per person; 60-300 People = 11-12 sq. ft. per person; 300+ People = 10-11 sq. ft. per person; Allow at least 24 inches of space between rows; If room is rectangular, set presenter to the long side; First row no closer than 2X screen height (2x8Rule); Center Section of seating no more than 14 chairs; 2 Side aisles should be at least feet wide

Schoolroom: General = 17-22 sq. ft. per person (18" tables. Add 1 sq. ft. pp for 30"); Less than 60 People = 22-23 sq. ft. per person; 60-300 People = 20-21 sq. ft. per person; 300+ People = 17-18 sq. ft. per person

Appendix A: Function Room Set-Up Formulas

- Conference:** 2-3 Feet of table length per person
- Banquet:** 60 Inch = 8-9 Ppl. (12.5-13.5 sq. ft. per person); 66 Inch = 9-10 Ppl. (12.5-13.5 sq. ft. per person); 72 Inch = 10-11 Ppl. (12.5-13.5 sq. ft. per person)
- Platforms:** Can be 6, 12, 16, 24 or 32 inches high. Usually 4x8 or 6x8 dimensions.
- General:** All schoolroom and banquet tables are 30" high; Rectangular tables that are 6 or 8 feet long by 30" wide are used for U-Shape, Conference, etc.; Rectangular tables that are 6 or 8 feet long by 18" wide are used for schoolroom set-ups.

Appendix C: Budgeting Formulas

- BEU = Break Even Units = Number of Attendees
 BEP = Break Even Price = Cost Per Attendee
 VC = Variable Costs
 TFC = Total Fixed Costs
 CF = Contribution Margin (Registration Fee - VC)

Formula One: $BEU = \frac{TFC}{CF}$

Formula Two $BEP = \frac{TFC}{\# \text{ of People (+)VC Per Person}}$

***To Make a profit, add the desired profit dollar amount to the TFC in the above equation*



Appendix D: Audio Visual Formulas

Formula One: First Row of Seats and Last Row Of Seats (2x8 Rule):
*No one should be seated closer that 2x screen height;
No one should be seated farther that 8x screen Height*

Formula Two: Minimum Ceiling Height:
Screen height + 4 or 5 feet (min. distance floor to screen bottom)

Formula Three: Screen Width (Refer to Ratios below)
*Overhead = 1:1 (8x8; 10x10)
Multi Image = 1:3 (6x18; 8x24; 10x30)
Slide = 2:3 (6x9; 8x12; 10x15)
Video = 3:4 (6x8; 9x12; 10.5x14)*



Appendix F: Food and Beverage Formulas

Continental Breakfast: One attendant and separate buffet table per 100 attendees;
Breakpoint for 2nd Buffet = 120 attendees; Usually run 30 minutes to one hour

Full Breakfast Buffet: Usually runs about one hour

Refreshment Breaks: 30 minutes = minimum amount of time; One attendant per 100 attendees; Morning = 65% Hot/35% Cold; Afternoon = 35% Hot/65% Cold; 50-75%; Regular Soft Drinks; 25% Diet Soft Drinks; Coffee = 20 Cups per Gallon; Coffee = 60% Regular/20% Decaf

Appendix F: Food and Beverage Formulas

- Luncheons:** Typical time = 1 hr. 15 minutes to serve. Schedule 90 minutes.
- Banquets:** Two Hours per dinner service; Three bottles of wine per table of 8 (2 white and 1 red); ½ bottle per person + 10% buffer; Every 10 bottles white = two red (opposite for red meat); Servers = 1 per 20 people (optimal) 1 per 32 (standard) 1 per 16 for upscale or with wine service
- Receptions:** One attendant per 50 guests; One bartender per 100 people if arriving in intervals; One bartender per 50 people if arriving as a group; Immediately Following Meeting -- Food Consumption is less; Less food/more drinks if reception is prior to dinner

Questions/Answers

**Please type your question into the Q&A pod
for us to read aloud to everyone**

HFMA Resources on the Web

Chapter Leaders

<http://www.hfma.org/Chapter-Leaders>

Program Chair Toolkit

<http://www.hfma.org/Chapter-Leaders/Program-Chair>

Additional HFMA Resources

Angela Orlando

aorlando@hfma.org

Chapter Relations Department

chapter@hfma.org or call (800) 252-4362

Thank You!

For:

- Giving your time to better the profession
- Sharing your talents that keep HFMA current and relevant
- Helping improve the effectiveness of your colleagues and their organizations

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Believe to Achieve