IFT Section Leader Handbook

IFT

Feeding the minds that feed the world

Introduction

THANK YOU for being committed to your service as a volunteer leader with your Section! Your work in providing members with education, networking, and other opportunities is pivotal to the success of our organization.

These guidelines are meant to support you and the work of your Section. Using the latest research, known practices, and providing you with guidelines and samples, our goal is that your Section is equipped with tools and ideas on how you can create an effective volunteer-led organization.

Plan to take notes, ask questions, and seek clarification. Use this information to introduce new ideas and concepts to your board. Educate your leaders on trends and best practices that will change the landscape of the volunteer experience. And remember, IFT staff are here to partner and support the success of your section.

Thank you again for your service to your Section, to the entire IFT community, and for your commitment to creating a culture of volunteerism at your Section.

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Section 1: Volunteer Management Guidelines

Creating a Culture of Volunteerism

What is culture?

Company culture is a shared set of workplace beliefs, values, attitudes, standards, purposes, and behaviors. It reflects both the written and unwritten rules that people in an organization follow. Your organization's culture is the sum of all that you and your colleagues think, say, and do as you work together.

Consider your current culture of your Section. Is there room for improvement? Is there a style you'd like to be?

If so, let's get to work!

Identifying and sharing team values, regular communication, celebration and recognition, and professional development are key strategies that enhance culture. These same attributes make for a satisfied volunteer.

Let's consider the journey our members take to become volunteers:

- Become a member of IFT and join a Section
- Receive initial information about being a member.
- Attend events, engage in online communities, and network with fellow members.
- Decide to volunteer at the Section level.

Begin volunteering.

- What is the journey to become a volunteer leader in your Section? Consider the following:
- Is there a clear succession pipeline of volunteers to serve our Section?
- Do your volunteers serve longer terms because there are no volunteers ready to lead?
- How do your members perceive the roles? Does it appear to be a lot of work with little value back to the individual? Do they see the benefits of leading and growing in your career and professional development?

Are there steps within that journey that would help us build a greater volunteer experience?
Of course! Keep reading as we explore the volunteer journey.

Volunteer Roles

Sections rely on a variety of volunteers to bring value to our IFT members. Your Section should showcase the roles available to encourage members to choose a volunteer role that fits best for their goals.

There are two documents that you'll need to refer to as you work on your Section's governance: Section Bylaws and the IFT Section Affiliation Agreement. Here's a snapshot of what is covered in these governing documents.

Section Leadership

Article V of the Section IFT Bylaws describes the composition of your Section Board of Directors. This information includes your Executive Committee, Directors-at-Large, and Student Representatives. Refer to your bylaws for the eligibility, terms, meetings, removal, and vacancy processes.

Further information is included in the IFT Section Policies and Procedures Manual. This includes more detailed information on the Section Officer Terms and Eligibility, roles and responsibilities and expectations.

Committees

Article VIII of the Section IFT Bylaws states information on the Nominations and Elections, Finance and Audit committees, which are essential for your operations. The Policies and Procedures Manual defines these three committees. The bylaws provide the framework for your Section to establish other committees, workgroups, and task forces to move your strategic goals forward. Refer to your bylaws regarding the process to create these committees.

Your committees will need leadership and members to advance your goals. The Audit, Finance and Nominations and Elections Committee's composition is defined within the Policies and Procedures. For all of your other committees, the Section Board of Directors will need to establish guidelines.   It is recommended to have a Chair and Vice-Chair as well as at least three other members to serve on a committee.

Committee members do not serve on your IFT Section Board of Directors but are encouraged to attend meetings and provide regular updates to your Board of Directors. The Board of Directors has oversight of the committees and should provide goals for the committees to focus on.

Micro-volunteers

These volunteers don't have an assigned role but are imperative to the success of your events and programs. Micro-volunteering allows members to assist as their schedule allows. These may be short-term or one-time volunteer opportunities. Micro-volunteering may look like:

- Assisting with registration at an event
- Serving as a moderator for a panel discussion
- Reviewing scholarship applications
- Attending a local college career day and presenting on careers in the industry
- Writing content for social media or an article

Micro-volunteering allows members to give back and be involved as their schedule allows. Many organizations find that micro-volunteers tend to become more involved, as they can pick and choose activities of interest.

Purpose of Volunteer Roles

Having clear expectations and role definition is critical for any organizational role. A volunteer job description should define the commitment, key details of the role, prerequisite experience or training and other key information. Job descriptions should be concise and reviewed annually.

Below are two examples of volunteer job descriptions for your Section to review. Consistency is key with the use of the categories: title, contact, commitment, job description, prerequisite, and other notes.

Title: Board of Directors Member

Contact: Section Executive Director phone and email address

Commitment: Board members serve a two-year term and are eligible for a second term. The board typically meets quarterly in person for half a day in a central location (other Sections hold these meetings virtually). Board members spend an average of 1-2 hours a week on board duties. Board members may also be part of a committee, which would require additional meetings. Committee work is usually done via conference call.

Job Description: Represent region of chapter to the chapter's board of directors. Board members are expected to be present at all board meetings and review all board materials prior to the meeting. Board members are actively engaged with the chapter's advocacy efforts, strategic plan and organizational goals, committee work and may be asked to respond to media inquiries. A full description is located in our policies and procedures manual.

Prerequisite: Member of IFT and the Section. Interest in serving peers at the Section level.

Other Notes: Travel costs (hotel and mileage) for the quarterly meetings are currently budgeted.

Title: Education and Events Committee Member

Contact: Education and Events Chair phone and email address, Executive Director phone and email address

Commitment: Committee members are asked to serve at least one year on the committee. The events committee meets every other month virtually and will have additional duties on a weekly basis. The average time spent on this committee is one hour a week.

Job Description: Committee members will be assigned objectives of the committee's plan of work. This may include sourcing event locations, program speakers, program marketing and onsite assistance. During the committee meetings, members will discuss upcoming events, review the events calendar and revenue goals, and discuss any upcoming opportunities for additional programming. Committee members are expected to report analytics and successes to the chapter executive director prior to the regularly scheduled meetings. This committee works closely with the Section's Board of Directors.

Prerequisite: Member of IFT and the Section. Interest in education and events, prior experience planning events preferred, but not necessary.

Value of Volunteering

Another aspect of volunteering is the value that you are receiving. Why are you in your role? Do you find value in volunteering? Be purposeful in the value that your volunteers receive. Value is not monetary gifts, but networking, professional development, and acknowledgment of their work.

Consider the following:

What value are we providing?

What value can we add?

What is the impact on the Section?

As you identify areas of value you can provide, you must consider the impact to the Section. Is this new value costing the Section resources (money, time, more volunteers)? Is this sustainable? Is this something our volunteers need or want?

You know your members and culture best. Start with the value questions at the Section board and choose an idea that will add value to your volunteer's journey.

Recruiting Volunteers

Effective recruitment of volunteers does not happen prematurely. When the work has been done to review the volunteer culture, understand the value you bring to volunteers, and have established the types of volunteers you need, then the recruitment begins.

Resource Commitment

Your Section's budget should include line items for volunteers. Key areas are:

- Meeting Expenses
- Orientation
- Professional Development
- Marketing & Recognition
- Tools

Meeting Expenses

Most likely you are finding workplaces or venues to host your meetings for low or no cost. That doesn't mean that they are completely free. Consider the following:

- Virtual meeting subscription or technology to host hybrid meetings.
- AV costs onsite

- Food and beverage costs to host in-person meetings.
- Parking or commuting costs to the meetings if employers don't cover the costs.

Orientation

Sections will provide an annual orientation training to volunteers. This will include Section board of directors and may also include committee chairs and all volunteers. Refer to the orientation slide deck for key information to review as well as customizable slides.

The orientation can take place virtually, but it is highly recommended that you host it in-person. This allows your volunteers to network and start to build a cohesive team.

Consider the following additions for your orientation:

- Creating or reviewing your annual business plan. This could include assignment of key tasks or objectives.
- Bringing in a professional development speaker. You may have members' co-workers or IFT staff present on topics (public relations, social media, AI, technology, etc.) or identify a skill that would benefit the group and bring in a professional speaker (public speaking skills, delegation skills, building consensus, etc.). Your local Chamber of Commerce or community colleges may be a great resource for you as they may have speakers bureau/content experts or know of local resources.

Professional Development

If this is a value add for your volunteers, you should allocate resources annually. Depending on your budget, you may consider the following:

- Convene after the orientation with a professional development speaker.
- Attend a local topic of interest. Check with your colleges, Chamber of Commerce, or other like organizations.
- Allocate resources for a Section leader to attend IFT's leadership programming. Have a commitment that they will then teach your volunteers what was shared.
- Take a tour of a members' workplace. After the tour, host an emerging trends discussion and how that relates to your Section.
- There are many virtual programs you can register for that are a small investment.

Marketing and Recognition

This budget allocation should be considered for the full term of a volunteer with you – from recruitment efforts to thanking them for their service. Here are a few ideas:

- Invest in an online video editor or program to create video testimonials of current volunteers. This is a marketing AND recognition tool!
- Provide Section apparel to your leaders. This could be a polo, t-shirt, or even a lapel pin. Abide by IFT's branding to ensure compliance. It is encouraged to not create separate committee items as it is more costly. Your leaders should all have the same item.
- Online recognition is low cost. Create a "Meet Our Volunteer Members Monday" social media

campaign where you highlight your volunteers. Include member recognition in your established e-newsletters.

- National Volunteer Week is generally the third week of April. Use this to highlight your volunteer members. If you post on LinkedIn, tag them in the posts for a larger recognition.
- Do you host trainings? If so, include in your slide decks information about volunteering and update the content each training to highlight new volunteers.
- When a key volunteer completes their service, it's time to recognize them for their time and commitment. It is recommended that you create a recognition program that works within your budget and expectations. Generally, this occurs at an annual recognition meeting – presenting them with certificates (or small desk plaques).

Tools

Time is one of the most valuable resources they give to your Section. Make the most of their time by providing tools to be most effective.

- Consider the following Section needs:
- Virtual meeting platform for virtual programming and meetings
- Email communication system – internally and externally.
- Social media tools – from designing to posting.
- Technology needs – file storage, access to emails, laptops, projectors, etc.
- Registration systems for events

Succession Planning

This is one of the most important aspects of your volunteer system – preparing for new leaders.

A great leader is always looking for their replacement – to bring in new ideas, fresh perspectives, and a new way of leading. Succession planning is bringing in the next wave of leadership and sharing your historical knowledge with them so that they are prepared to make the best decisions for the organization.

Succession planning should not wait to begin until five months before you need new volunteers. It is an ongoing process. It begins with recognizing interest in members.

At your next Section event, challenge each board member to talk with three members and learn more about their interests. How do those interests relate back to the Section's goals?

If you have a Nominating Committee, share this information with them. They are a great central resource for volunteer interests and previous volunteer history.

Once you've identified your new leaders, build in transition time with them.

The current leaders should connect with the new leader 1-2 months before the new volunteer year to review essential information – job duties, how to use Section tools, expectations, etc. This is also a time to ask your replacement what questions they have so that you can provide further training. By asking now, you are identifying key topics that should be addressed in the overall orientation with all leaders.

If there are key systems that you share, host a virtual tutorial for all new leaders who will be using that system.

You will also want to start transitioning key accounts during this time. Financial institutions, for example, generally have a form you will need to sign to add a new board member to the account. This process can be lengthy depending on volunteer location proximity.

Evaluation

The most effective organizations formally evaluate their volunteer structure and processes. Evaluations are a tool and are used to gain insight into the needs of your volunteers, track progress year-to-year and provide feedback to your Section. Do not survey your volunteers if you won't use this tool to analyze your systems or make changes. There are two surveys we recommend:

Annual Volunteer Survey

Deploy the survey annually two months prior to the end of your volunteer year. It's important to track progress year-to-year, so the same survey questions should be asked. Additional questions based on the year's events can be added.

The Section Board of Directors should review the survey results together and discuss trends and insights to take action for the upcoming year.

Board and Governance Self-Assessment

This self-assessment can be given annually or every two years. This evaluation tool will provide insight into areas of board and organizational governance that need to be focused on.

It's important to note that there is no perfect score in the evaluation tools. Your goal is to use the information to educate your volunteers and continuously improve.

Section 2
Governance

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Section 2: Governance

Government Filings & Registrations

Understanding The Structure

IFT Sections are Independently incorporated legal entities of the state of registration. As such it is the board's responsibility to ensure it maintains its registration status with government agencies, and provide proof of registration as may be requested or required the IFT.

IFT Tax classification must be either 501(c)3 (charity) or 501(c)6 (business league, or professional society). It is critical for Sections to understand which tax classification it has with the federal government. Laws governing and regulating the finances and operations of the two classifications vary.

Both tax classifications require annual tax filings IRS form 990 or 990-EZ for gross receipts greater than $50,000. Sections grossing under $50K are eligible to file a 990 e-post card.

Resource: https://www.irs.gov/forms-pubs/about-form-990

Sections of IFT share members with the IFT, and consequently the IFT mission, vision and values systems.

Affiliation Agreements are in place for the mutual protection and support of the IFT mission and membership, defining the relationship rules, requirements and restrictions between legal entities.

Sections are to operate autonomously within the scope and parameters of the Affiliation Agreement. Where the Section is autonomous, it is also responsible for and accountable to IFT members within its assigned geographic territory.

Bylaws differ between sections; all are based on a standard template.

Minimum Operating Requirements

Membership Requirements

- Maintain a minimum of 25 Section members (excluding Student Members)
- Operate within IFT-authorized geographic area.
- Submit membership dues and benefits by August 31 for any proposed changes.

Leadership Requirements

- Ensure all Officers, Directors, and Committee Chairs are members in good standing.
- Conduct annual elections per Section bylaws.
- Submit updated officer/director list by April 1
- Submit committee lists by August 15
- Directors & Officers Insurance

Meeting Requirements

- Hold a minimum of two (2) Section meetings/events annually.
- Event Liability Insurance

Fiduciary duties

Fiduciary duties are the cornerstone tenants of effective and productive boards, driving behaviors and actions.

Loyalty. The duty of loyalty requires fiduciaries to put the organization's interests above their own, avoiding conflicts of interest and personal gain from their decisions or access to organizational information.

Strategic Planning and Budgeting

Planning. In advance of the upcoming fiscal or calendar year, mapping the Sections strategy and a budget to support it is critical for mission progress. The main purpose of a strategic plan is to provide a future direction and trajectory for an organization. A successful strategy:

1. Aligns with the mission and values of the IFT, reinforcing structure.
1. Builds capacity of the Section for its members in pursuit of growth, inclusion, advocacy
1. Leaves room for innovation

This increases organizational alignment where all are working towards common goals. The workplan that accompanies a strategic plan specifies how, who, what when, where and how much to achieve goals. Strategies include well thought out goals, tactics, timelines, people and financial resources and goal performance metrics – both outputs and impacts.

A work plan should be flexible enough to accommodate changes and adjustments as needed without disruption to the overall strategy. It should be regularly reviewed and updated to reflect the evolving needs and circumstances of the chapter.

Budget. A successful plan has a realistic budget that considers a variety of environmental factors like inflation, performance of past programs and member retention, to name a few.

Contingency Plan

A contingency plan is essential for an organization because it prepares the board and leadership to respond effectively to unexpected events, minimizing disruptions to operations, protecting assets, and ensuring continuity of essential services. A well-structured contingency plan anticipates potential risks—such as natural disasters, financial crises, loss of key personnel, or regulatory changes—and provides clear steps to mitigate their impact.

Key Considerations for a Board's Contingency Plan

Risk Identification and Assessment. Identify potential risks specific to the Section and assess potential impact. This involves reviewing financial, operational, reputational, and compliance risks, as well as insurance needs to prioritize contingency strategies.

Resource Allocation. Contingency planning may require setting aside financial reserves, or budgeting for losses in membership, volunteer and financial resources.

Roles and Responsibilities. Clear roles should be defined in the contingency plan, specifying who will make decisions, communicate updates, and implement specific actions during a crisis. The board must determine who will take the lead in various scenarios and empower those individuals with the authority needed to act swiftly.

- Communication Plan – protocols for timely updates, distribution channels, and messages to keep stakeholders informed.
- Compliance and Legal Considerations - Plans may be required to adhere to legal and regulatory requirements to avoid liabilities.

Flexibility and Review. As risks and priorities evolve, the board must periodically review and update the contingency plan to reflect new threats, changes in operations, or lessons learned from past incidents.

Section 3
Events

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Section 3: Events

Defining Event Goals, Objectives and Desired Outcomes

Summary

Event plans begin with a strong set of goals and desired outcomes. The first step in a successful event is outlining a clear understanding of what success looks like. A clear set of goals drives decision making, essential budget building and will assist in measuring return on investment post event.

- Begin with the end in mind—How will you know the event is a success? Is it a financial goal, attendance goal, specific satisfaction metric or all of the above?
- Spell goals out clearly and ensure all stakeholders, event team members, vendors and volunteers understand them.
- Use SMART goals—Specific, Measurable, Attainable, Relevant and Time Bound
- Strong event goals will assist in determining your event audience and their needs.
- Strong event goals will assist in building realistic event budgets.
- Strong event goals will assist in designing your event.
- Identifying event goals at the beginning of the planning process will allow for realistic success measurement.

Best Practices for Determining Event Goals and Objectives

1. Identify primary event goals—key questions to ask:
    a. Why is the event being held? For example, is it to generate revenue, brand awareness, educate, etc.?
    b. Why are people gathering? What is the purpose of the event?
    c. For example, is the purpose to provide a showcase for new technologies, educate professionals, provide a networking space, some of these, all of these, etc.?
    d. Who is the primary, secondary, etc. audiences for this event? For example, primary audiences may be senior-level buyers and suppliers of industry technology. Secondary audiences may be emerging leaders and media.
    e. What will EACH these audiences gain by attending the event? In other words, WHY should they attend?
    f. For example, the primary audience of senior-level buyers will gain networking opportunities

with other senior-level buyers and the convenience of one-stop shopping. The secondary audience of Emerging Leaders may gain networking opportunities with senior-leaders in the field and education.

1. Create SMART Goals:
   g. Breakdown the goals into Specific, Measurable, Attainable, Relevant and Time Bound statements.
   h. Under each SMART goal, outline any specific objectives (tactics, strategies) to accomplish that goal.
   i. Try not to develop a long list of event goals—stick to the three to five goals with measurable outcomes.
   j. Document and distribute these event goals to all key people involved in the success of the event.
   k. **IMPORTANT:** Refer to these SMART goals when budgeting for, designing the event and making decisions as they arise.

Examples of Event Goals and Measurable Objectives

Generate revenue

- Paid attendance through selling 500 tickets or registrations.
- Develop a basic sponsorship program to assist in underwriting event expenses.
- Create a set of demo opportunities for sale that add to revenue.

Create brand awareness

- Achieve a score of 85% awareness responses on event survey.

Increase audience engagement with the brand/organization

- 350 number of attendee interactions at event activations
- Tracking social media engagement—X, Instagram and LinkedIn

Your goals and objectives sheet should sit side-by-side next to the budget. Once the budget is set, clarity and add specific metrics to the goals.

When to Schedule Your Event

Summary

Knowing when (month, day of the week and time of day) to schedule a live event can often mean the difference between low attendance and high attendance.

People's busy lives often force a tough decision—attend your event OR attend my family function? Attend your event OR participate in my hobbies and interests? The goal is to schedule events that avoids your desired audience having to choose between business and personal events, because most often, personal events will win.

Using the goals and objectives, the type of event and desired event audiences should be clearly identified. Use these to guide you through the set of key questions below.

From there, a set of best practices will assist in determining the best possible dates and time for your event, which you will need in order to secure the venue or location.

Best Practices to Schedule a Live Event and Maximize Attendance

1. Avoid scheduling events during all major holidays and religious observances. Conduct a Google search to determine when these will take place in future years.
2. Avoid scheduling events during popular family time periods including Mother's Day, Father's Day and event Winter and Spring Breaks for students.
3. Avoid unnecessary competition. Research an industry calendar to determine if any other competitive events are taking place.
4. Refer to IFT's event calendar before selecting a short list of dates to determine any conflicts.
5. Always create a short list of three to five sets of dates for your event, in order of preference. Your perfect event venue may not have your preferred date available, but may have your second and third dates available.
6. List and share your top three to five sets of potential dates with key event stakeholders and ensure everyone is in alignment.

For one day business events:	Schedule during weekdays Tuesday-Thursday are best options
For multi-day business events:	Schedule during weekdays, but if the audience is traveling from far distances to the event, Saturday or Sunday evening start through mid-week is acceptable
For evening business or social events:	Schedule Tuesday- Thursday beginning early evenings (Avoid Friday-Sunday)

Key Questions to Ask When Scheduling Your Event on the Calendar

- Are your desired attendees within driving or commuting distance from the event? If so, a one day business event is appropriate for this audience.
- Are your attendees traveling regionally or internationally?
- For example, if your attendees need to fly to your event with a morning start time, be aware that they will most likely need to arrive the day before. Will you include an organized evening event the day before for these attendees? If so, your one day event, may now technically become a two-day event.
- Are other important or similar events already taking place around (within 30 days) of my desired event dates? If so, strongly consider new dates positioned a minimum of 60 days away from similar or competitive events.

Designing Your Event:

Creating Your Agenda and Participant Experience

Summary

Once the event purpose and goals have been established, it is time to craft the event agenda and design the participant experience. In effect, the careful consideration of the event's agenda outlines the entire experience for the attendee and what value they will receive for their attendance.

Creating your event agenda is necessary to:

1. Develop a strong and detailed budget
1. Source and contract appropriate venue for your event
1. Market your event experience to attendees

<u>We will use the following example, goal and background information to explain the event agenda creation process:</u>

- My event goals are to raise revenue
- Increase brand awareness
- Increase membership
- My prospective attendee base is regional and within driving distance

Best Practices in Creating An Event Agenda

(Step 1): Consider Event Modalities

Your event purpose and goals will determine which type of event modality to choose from. These are the most common event types:

- **Exposition or Expo**—a space where companies are stationed to display and educate potential buyers about their products or services. Expos can feature exhibit and vendor booths of various sizes including full standard exposition booths of 10'x10' or larger; smaller 6' table top size exhibits and even small pop up signs with tall high tables and stools offer a space to exhibit a product or service.
- **Conference**—designed for discussion; proceedings may be published. One to two days.
- **Workshop**—very interactive and relatively short, ½ day or full day. Requires experienced facilitator or subject matter experts.
- **Social events**—usually a few hours in duration. Often the major focus is business networking, product launches and/or charitable fundraising

Looking at your event goals and objectives—determine what type of event will meet your audience's needs.

For example, we will use these goals to explain the process:

- My event goals are to raise revenue, increase brand awareness and increase membership.
- We will do this be offering attendees significant value in terms of taking home new ideas, new professional contacts and new tools.
- My prospective attendee base is regional and within driving distance

Although there are a few options that will work to meet these goals, the best option may be: **Half-day conference**. Why?

- A half-day event is overall less expensive to keep registration fees reasonable, yet the timing is long enough to create attendee experiences that provide value to them and meet your overall goals
- A half-day conference offers the ability to showcase the organization's brand through educational sessions such as Keynotes
- Keynotes, coffee breaks or other sessions can be sponsored, increasing revenue potential
- The half-day conference offers the ability to gather attendees for networking breaks within the event to demonstrate the power of membership

(Step 2): Determine Your Program's Components

Within the event's selected modality, program components will need to be considered for your target audiences such as:

- Keynote sessions
- Concurrent or breakout sessions on specific topics
- Networking breaks
- Expo floor and ancillary show floor activities
- Fun Run/Wellness elements
- Social events and fundraisers

Continuing on with our half-day conference example, we will identify these program components:

- Our event will be one half-day from 8:00am to 1:00pm
- We hope to attract 500-800 attendees
- We want to showcase our organization's thought leadership and brand so we will offer our attendees a valuable not-to-be-missed Keynote session which will be sponsored for an additional revenue opportunity
- We want offer attendees value by providing 3 different topical forums for industry discussion. This will also provide a networking opportunity.
- We will sell VIP tables during the closing luncheon for an additional revenue opportunity

(Step 3): Create an Effective Event Timeline (also known as your EVENT AGENDA)

To build an effective event agenda—you must "walk in your participant's shoes". The timing of the event or program, from start to end time and everything in between, must be carefully considered with attendees and event goals in mind.

Agenda pacing must include:

- Proper amount of break times and “white space” where no programming is taking place. Too much on an event agenda overwhelms attendees and they begin to lose value in your event.
- Every programmatic element of your event must have a start and end time

Above all, the entire event experience should provide VALUE for the attendee. The event agenda becomes the event’s primary communication and marketing tool. It’s the very first thing prospective participants will review to determine whether or not it’s worth their time and money to attend. Your event.

(Step 4): Design Appropriate Event Environments

The event environment is the venue or where the event takes place. Tone and energy levels will vary with event venues. Furthermore, you must decide how the selected event venue will be organized and structured in order to meet your needs for the event.

Once the basics of the event environment have been determined, the event experience can be enhanced based on budget, sponsorship, etc. For example, add lounge furniture or enhanced food and beverage.

Key Points

1. Always refer back to your original goals and objectives when selecting a certain type of event modality
2. List all the possible/desired event activities and assign time lengths to each one
3. Each program element MUST have a start and end time
4. Keynotes should not last more than 60 minutes; breakout or standard concurrent sessions should be 45 minutes. Longer workshop sessions can be 2-3 hours in length with breaks.
5. For structured agendas, fifteen-minute breaks should be scheduled every 90 minutes, maximum.
6. Put yourself in the shoes of your audience. Are the activities and program elements bringing value to the attendees?
7. Take care not to overschedule your event—participants need time to take care of personal/professional needs, refresh and refocus. Too many elements within an event can cause overwhelm in participants.

Budgeting for Your Event and Event Insurance

Summary

Budgeting for events is the process of planning and preparing estimated revenues and expenses in order to achieve the event’s financial goal. Every event has a financial goal: and every successful event has a budget—a detailed plan on revenue and expenses. The event budget becomes your roadmap for planning—ensuring your meet your event’s financial goals.

Steps In Developing Event Budgets

(Step1): Review your event's financial goals, which will be one of these:

Profit— (net income): Revenue exceeds expenses

Break-Even: Revenue equals expenses

Deficit—(subsidized) goal: Expenses exceed revenue so a host or other organization provides funding to meet the expenses

(Step 2): Begin with a Zero-Based Budget

For purposes of these meeting management tools, and assuming your event is new with no previous history, begin with a zero-based budget. <u>This zero-based budget will involve detailed notes on projections with rationale and justification for each revenue and expense.</u>

(Step 3): List and Forecast REVENUE Buckets

Most events will have revenue in the following areas:

Registration fees or ticket sales—the participant's cost of entry.

Depending on your event's registration goals, registration fees can ***vary*** and your pricing strategy will dictate your per person registration or ticket fee.

An example registration pricing strategy:

- Your event's financial goal is to make a profit.
- You begin with a baseline fee, in this example, you've determined that $195 for your event is a reasonable fee and will cover an attendee's event expenses.
- You want to incentivize early registration (and early cash flow) so you will give your attendees who register early a $20 discount for $175 for the first 4 weeks of open registration.
- You will close advanced registration 1 week before the start of the event.
- You will offer on-site registration at a higher cost of $275

Sponsorship

Sponsorships for events fall into two categories:

1. **Direct financial support** in exchange for recognition or other opportunity with your audience

2. **In-Kind donation** of something the event needs and would otherwise have to pay for—in exchange for recognition or other opportunity with your audience.

   Important note: An in-kind sponsorship reduces one of your expense line items. For example, a company pays for the registration bags and badge holders for your attendees and are branded with their company logo. You would still include the expense in your budget, but it will off-set with the in-kind value in your revenue budget, so there is not actual cash expense.

In both of these instances, your revenue budget would reflect the cash amount the event is receiving for the sponsorship (what you are charging the sponsor) or the VALUE of the in-kind donation. We do this in order to gain a full and accurate understanding of event elements and the overall value of the event.

NOTE: It's important to understand the TRUE NET cost of any sponsorship, and the best practice is to include the expense to provide the benefits into the sponsorship price, so that the event is making money, not losing money.

Exhibits/Vendor Booths

Exhibits or any kind or size will have a value and expense tied to them. Ensure you are accounting for all exhibit or vendor table top booth in your expense line items. Price your exhibits/vendor table top booths appropriately in order to generate revenue.

Merchandise

Your event may choose to sell merchandise to your attendees anything from books to printed items and clothing can generate additional revenue. Everything has some kind of cost that should be included in your budget.

(Step 4): List Event EXPENSE Areas

Create your event's anticipated expense areas. Many of these expense areas can be further broken down into subcategories. The more detail you can accumulate on your event expenses, the better. Common event expenses include:

- Registration system
- Venue rental
- Food and Beverage
- Audio Visual
- Décor
- Signage
- Programming and Speaker Fees
- Shipping/Freight
- Transportation
- Marketing
- Event Insurance
- Gifts and gratuities
- Event Supplies and Merchandise (name badges, office supplies, giveaways)
- Temporary Staffing
- Security
- Entertainment
- Contingency

(Step 5): Identify Which Event Expenses are Variable vs. Fixed Expenses

A variable cost will depend on numerous factors, but generally based on number of attendees. You should have a target event participation goal in order to project variable expenses.

(Step 6): Conduct Research and Forecast Expenses

Once you've identified all of your expenses, conduct research and obtain written estimates and quotes for all anticipated expenses, both variable and fixed.

When obtaining expense quotes, be as specific as possible and use multiple scenarios to project expenses, such as a range of attendees, a range of menu prices. The more information you have to create a detailed expense budget, the better your event budget will be.

(Step 7): Enter Revenues and Expenses into a Budget Spreadsheet to Calculate Total Expenses vs. Total Revenue

When entering revenues and expenses into your event budget spreadsheet, be sure to link or attach or include within, as much detail as possible to explain your logic. There is no such thing as too much detail in an event budget. Details will assist you in your planning process, such as knowing what the attendee marketing goals are, how many hats to order, how many exhibit booths to plan for in terms of space needed, etc.

(Step 8): Adjust the Budget to Meet Your Event Financial Goal

Once you have entered all initial expenses and revenues into your budget spreadsheet, you can clearly see if your event will net a profit.

Revenues – Expenses = Net Profit

1. If the net profit is less than what you anticipated, you generally have three options:
2. Raise your registration fees
3. Increase your projected attendance numbers—NOTE THIS WILL THEN IMPACT YOUR VARIABLE EXPENSES, SO DON'T FORGET TO MAKE THOSE ADJUSTMENTS AS WELL.
4. Reduce expenses
5. A combination of all of these

(Step 9): Review and approve with stakeholders/Assign tasks/responsibilities

- Review your budget thoroughly. Are your revenue goals realistic? Are you confident with your price quotes for expenses?
- Discuss with all event stakeholders—make adjustments as necessary until consensus is reached.
- Distribute the event budget to all appropriate parties and assign responsibilities to team members. For example, sponsorship and exhibit sales may be identified as one team and they clearly understand their goals. Another team may be responsible for expense management, etc.

(Step 10): Monitor Continuously

Once your event budget has been approved and distributed, meet regularly to monitor progress on all goals and expenses.

It’s important to be aware of everything happening with your budget throughout the event planning process. For example, registration pacing—are you on track to meet your registration revenue goal? If not, what kind of enhanced marketing do you need and is there a cost associated? Where can you cut back on an anticipated expense to find the additional funds? Are you doing better than projected in exhibit sales? Do you have enough space to increase the exhibits area?

To avoid surprises when calculating the success of your event financial goal, stay on top of the budget by doing monthly budget checks at a minimum.

Event Insurance

General Liability Insurance—most event venues and contractors require the event host to a hold a certain amount of Comprehensive General Liability Insurance, which is usually $1M to $2M, enough to support the defense and judgement of a claim.

General liability insurance is necessary to protect the host from unforeseen property damage or injury caused during your event. You may also ask your vendors to name your organization as an additional insured in case of injury or property damage due to the vendor’s negligence.

Costs for general liability insurance are typically related to number of attendees—the smaller the gathering, the lower the premium. Most major U.S. insurance companies can provide general liability insurance for your event.

Cancellation/Interruption Insurance—this type of insurance is often purchased for one event at a time, usually one year at a time, but that varies. Cancellation insurance protects the event in case of unforeseen circumstances (out of the control of the event host) that either prevent the event from occurring or interferes with the event.

Cancellation insurance protects the event financially and premiums are typically based on a percentage of total anticipated revenues.

There are many insurance companies who will provide cancellation insurance for events, but ensure you are aware of policy exclusions such as pandemics or terrorism.

Always include your event insurance premiums in your expense budgets.

Best Practices in Event Budgeting

- Be realistic in your event revenue goal projections. A best practice is to create different revenue scenarios based on conservative, average and above average numbers. Selecting the most conservative revenue goals is a best practice.
- Conduct good vendor research and send out request for proposals to obtain costs for various aspects of your event. Compare not only cost, but reputation, reliability and quality. Select the best vendors with the best reputation that you can afford.
- Analyze your attendee experience and see if what you are spending money on is worth it. Where are you going to get the biggest bang for the buck in order to meet your goals? You may find you will need to move some expenses around.
- Get event stakeholder buy in for the budget and ensure that everyone understands what the event will look like based on the budget. Ensure all team members are clear on their

responsibilities with regards to the event budget.

- Be as detailed as possible when forecasting your budget. Include all notes outlining logic for forecasting.

Securing Your Event Venue: Negotiations and Contracting

Summary

Events have a variety of venues to choose from and your event goals and objectives should be the driving force in venue selection.

Event organizers need to develop a Request for Proposal (RFP) to source an event venue (and other services for the event such as audiovisual, décor, etc. Your event design and attendee profile should sit alongside your RFP development. A strong RFP can save time because a facility can provide a complete proposal that will allow you to make a decision without a lot of back and forth. Once a venue is selected, understanding how venue contracts are negotiated can assist in you securing the best deal for the event and a strong contract can protect your organization and event.

Steps in Venue Sourcing

(Step 1): Gather and review the following:

a. Event goals and objectives
b. Three sets of desirable event dates in order of preference
a. Your event design and agenda flow
b. Number of anticipated attendees and where are your attendees coming from?

(Step 2): Understand your venue options and create your target list of venues

a. Convention Center—for very large events and expos
b. Conference Center—for smaller events where the focus is education and training
c. Convention Hotel—large hotel usually connected to or very near a convention center. This type of venue usually has a large amount of hotel sleeping rooms as well as ample and varied event space.
d. Airport Hotel—some airport hotels are full-service, similar to a convention center hotel and some are limited service that are essentially just sleeping rooms for airport travelers.
e. Resorts—normally outside the main city centers, these are typically upscale with varied event space and amenities. Typically, the most expensive event venue.
f. Alternative event rental venues such as universities, restaurants, etc.

In order to help secure the right event venue, you should strive to understand your attendees' preferences as much as possible. Do you they want to be near the action in the city center or do they prefer the amenities of a resort?

Create a target list of venues and reach out to the venue's sales/catering departments for the correct contact's name, title and email to send your RFP.

In order to get the most availability, you should send your event RFP out to selected venues 12-18 months out from the desired date of the event. For large events, RFPs to venues should go out a minimum of 2 years out.

(Step 3): Develop the venue Request for Proposal (RFP)

Your detailed RFP allows the venue to understand your group and respond with a proposal if they have your desired dates, appropriate space and other requirements for the event. Therefore, your RFP should follow this format:

- Key information about the group or organization holding the event
- Purpose of the event
- Information about the meetings' attendees and your anticipated attendance
- 3 sets of preferred dates for the event, if possible
- Number and type of hotel guest rooms, if required and range of acceptable rates
- Your event agenda
- Number, size and usage of meeting rooms along with estimated times they are needed
- Number and types of food and beverage events along with estimated number of people
- Food and beverage expenditure, if available
- Exhibits, or other special events
- Needs for complimentary items or services, such as number of complimentary valet parking passes or complimentary room upgrades
- History of past events, if it is available, if not, specific that it is a new event
- Provide a timeline of the decision process, i.e., when proposals are due and in what format, when the decision will be made.
  From: Professional Meeting Management, Sixth Edition

(Step 4): Send your RFP to your list of venues

- Send your RFP to your sales contact list in an email and ask the contact to confirm receipt so you know which venues are interested.
- Follow up as necessary

(Step 5): Receive and analyze proposals

Create a spreadsheet or a simple scoring system to analyze the venue proposals that come in.

NOTE: Remember, these are just proposals, and in most instances, all have room for negotiation!

Once you have your list narrowed down to two or three viable options, respond to all venues with the status—short list, not accepted, etc.

(Step 6): Conduct Site Visit and Make Final Decision

- Schedule a site visit with venues on your short list and take photos and notes on your walkthrough so you can refer to them later.
- As you visit the venues, picture your event design and attendees in the space. Can you see your event there? What are the drawbacks and make notes.
- Make your final decision on the event and notify all venues

Best Practices in Negotiations

Now that you've selected your event venue, or any other vendor, you can enter into the negotiation phase.

Generally speaking, most items in your proposal are negotiable, and most venues expect you to negotiate. Do not skip this process.

- Know your key priorities and rank them in importance before you begin negotiation. For example, you may be willing to forgo complimentary parking if you receive a 15% discount on your menus.
- Know your venue's priorities—in what areas does the venue make money and may be less willing to negotiate and in what areas does the venue have soft costs that they can send on to you?
- Know your market and your event's financial worth.
- Organize your requests for the contract into "must have, nice to have, don't need".
- Are you willing to sign a multi-event deal? Let the venue know that, as it may have an impact.
- "Rates, dates and space" are key words to remember. Most of the time, you can have two, but not all three. Which two are most important to you? The rate of rental, the available dates or the space available?

Best Practices in Contracting

Your venue or other vendor will most likely bring your agreed upon terms to you in their own contracts—which almost always will benefit the venue or vendor. ALWAYS ASK LEGAL COUNSEL TO REVIEW YOUR CONTRACTS BEFORE SIGNING.

Understand these clauses:

- **Actual damages:** compensate for actual loss
- **Liquidated damages:** reasonable estimation of actual damages to be recovered by one party if the other party breaches the contract
- **Attrition:** the difference in between the actual number of sleeping rooms, or food and beverage covers or revenue projections and what was agreed to in the contract. (APEX Industry Glossary 2011). If a group doesn't meet its food and beverage commitments, the clause details the compensation due to the venue. Typically, 80% of the agreed upon number or amount expected is the attrition threshold.
- **Cancellation clause:** Outlines the damages to be paid by the group to the facility in the event of cancellation. Ask for a tiered-structure and related damage percentage cancellation clause. For example:

Between date of signature and 12 months	50% cancellation fee due
Between 12 months and 6 months	75% cancellation fee due
Between 6 months and date of event	100% cancellation fee due

- **Force Majeure—aka “Act of God”:** Clause that protects both parties in case of very specific unexpected occurrences such as terrorism, extreme weather, labor dispute, war. Since the pandemic of 2020, Force Majeure has been debated and contested. Seek legal counsel to determine if the force majeure clause is sufficient and acceptable.
- **Indemnification: aka “Hold Harmless Clause”,** one party agrees to pay damages or claims that the other party may be required to pay to another. (Professional Meeting Management, Sixth Edition). Always ask the venue or vendor to include mutual indemnification in the contract—many venues will not do this and the event organizer must ask for it.

Creating an Event Operations Timeline

Summary

An event operations timeline is the “playbook” of the entire event and is critical to keeping all stakeholders and team members on track. It is a chronological list of the tasks that need to be completed for your event.

Event operations timelines allow you to set deadlines and assign tasks. It is a master “to-do” list for your event. Once you create your timeline, share it and meet on a regular basis to ensure each item is completed on time.

Best Practices in Event Timelines

This sample timeline provides best practices in developing key milestone dates and more detail is necessary to add for your individual event.

It is important to:

1. Include actual dates for your event in the timeline
2. Assign all tasks to an individual/s
3. Share the timeline with team members meet regularly to discuss progress, checking off items as they are completed.
4. This is an important document—keep it updated and sharable

Developing Event Policies and Procedures

Summary

A well-organized event has policies and procedures in place for all attendees. Event policies address the "duty of care" that all event organizers have to their attendees and guests. In addition, clear policies eliminate confusion on what is not tolerated at the event to protect attendees and the organization.

Not all policies are right or needed for every event or host organization. It is recommended to think through the event's target audience and their experience to identify any potential places to install policies.

It is important to garner stakeholder support on all policies and communicate them clearly to attendees when registering as well as any information on site.

Standard Event Policies for Consideration

- ☐ Code of Conduct
- ☐ Media
- ☐ Payment methods
- ☐ Photographs/Video
- ☐ Policies for giveaways/contests
- ☐ Registration Cancellation (covered in Event Registration section)
- ☐ Registration Substitution (covered in Event Registration section)
- ☐ Health and Safety policies
- ☐ Alcoholic Beverage policies

Event Rules and Regulations

You are free to establish any reasonable and legal set of rules for your event if they impact the attendee experience or the overall spirit of the event or the mission of the organization. Your venue may also have specific policies that may need to be communicated to your exhibitors or vendors, such as drones, balloons, fire hazards, etc.

The key in both event policies and regulations is to be as clear, specific and detailed as possible and to request your participant/attendee acknowledges the policies and regulations in order to attend.

- **Best practice:** Once all event policies and regulations have been drafted, it is best to ask legal counsel to review them in order to protect the organization.

Event Registration

Summary

One of the most important aspect of event planning is the registration process—signing up for and paying (if applicable) for the event. Registration, however, is much more in that it becomes a data collection mechanism which is critical for your event. Your registration reports will tell you WHO is coming, WHAT they are participating in and HOW MANY people to expect for food and beverage, event supplies and other requirements.

Registration is the main mechanism that you will use to understand financial standing and whether your goals are being met. Throughout your event, you will continuously monitor registration once it's open and a successful event will encompass a smooth and easy flow from sign up to badge pick up.

Event registration can be thought of in three phases:

- Pre-Event
- On-Site
- Post-Event

All three phases must have equal attention and a dedicated team member is recommended to focus on the registration process.

Best Practices in Pre-Event Registration Set Up

The primary goal is to create a positive experience for the attendee through registration. This means ensuring a well-thought out and easy to follow system to collect the necessary information.

Event registration should be set up using an **online event registration system** which we will breakdown further in this section.

(Step 1): Determine what information needs to be collected in the registration process and why. Please be mindful of privacy regulations and responsible use of data.

- Only include questions that you will need the answers to—too many questions in a registration form incumbers the process
- Think about post-event, what will be the most important things you want to know about the attendees who came to your event? For example, were they first timers? Or, how many years in the field?

(Step 2): Answer the following questions about your PRICING STRATEGY—this should be easy to answer, refer to your event revenue budget.

a. What are the PRIMARY registration categories depending on the AUDIENCES we want to attract? For example, one event may have three registration primary categories: Researcher, Supplier, Student.

b. Will we offer different fees for members or non-members?

c. Will we offer discounts for early registration?

d. Will we offer registration on site?

e. What is our fee structure? **PICK THIS UP DIRECTLY FROM YOUR REVENUE BUDGET**

f. Do these fees along with our registration goals meet our registration revenue budget?

Based on these answers you might have a grid that looks like this:

Registration Primary Category	Member Early Fee	Member Regular Fee	Member On-Site Fee
Researcher	$195	$295	$395
Supplier	$295	$395	$495
Student	$55	$95	$195
Guests (no food functions)	$0	$0	S0

Of course, your event pricing strategy may be more or less complex than this example, but—pro tip, once you complete and approve the above grid, this can be used in all marketing and promotion to understand the incentives to joining and the incentives to registering early!

(Step 3): Choose a Registration System

There are many registration options available for events, depending on size and complexity. For example, an event of over 2,000 attendees may choose to hire a full-serve registration company (third-party) who can set up the system, monitor the registrations and financials, handle badge pickup and registration on site and provide post-event reporting. A smaller event of 200-1000 may choose to use an online system to create their own registration site and use volunteers on-site to handle badge and material distribution. The answer depends on your level of resources and should be budgeted for in event expenses appropriately.

Questions to ask:

- How large is my event? How many attendees am I expecting?
- Are they all to arrive around the same time?
- Do we have the resources to set up the registration system, monitor reporting and financials and conduct the post-event analysis?
- Do we have the resources to manage questions from attendees, pre-event?
- Do we have the resources to manage on-site badge and material distribution on site as well as handle any new on-site registrations?

Registration vendor services differ depending on the niche events they serve—talk through your needs in detail to determine if the system or service is right for your event. Questions to consider:

- ☐ Is the system or service the fit my event?
- ☐ What is the system or service's pricing model? What will my event be charged for this service?
- ☐ How does the system collect our registration fees? This should be directly to an established host bank account—never to the service or company.
- ☐ Have a good reputation?
- ☐ Does the system come with support for questions?

- ☐ Is the system self-serve? Can we run our own reports?
- ☐ Does the system integrate with other apps or software?
- ☐ What kind of reports are standard? Can we customize reports?

(Step 4): Develop Registration Policies

All event registration process MUST include a set of policies by which decisions are made. Work with your registration service provider to gain an understanding of what other event organizers include in their registration policies.

Clear registration policies are necessary and can avoid issues during and after the event.

Ask these questions to help determine your event's registration policies:

1. What is our cancellation policy? Best practice is to allow cancellations before a certain date. Be specific, see example below:

   Cancellations will be allowed and refunded 100% if cancelled before November 30, 2024 at 11:59pm EST.

   Between December 1 and December 30, 2024 at 11:59pm EST—50% refund of fees

   After December 30, 2024—No refunds will be given

*Align these dates with key milestones in your event planning, such as when you must order quantities of supplies or share food and beverage final numbers.

2. Will we allow registration replacements or transfers?
3. Will we charge an administration fee for transfer?
4. Will we require registrants to present a valid picture ID to pick up badges?
5. Can registrants bring guests? Is there a fee? Include that as a registration category.
6. Are children under 18 allowed at the event?
7. Will we allow only credit cards for purchases?

All policies should be communicated under a POLICIES section in the registration process and the registrant should be asked to check an acknowledgement box.

Data Privacy Policy and Registration

The collection of personal information in the registration process is often necessary, but as event organizers, we are obligated to protect that data. Compliance with the General Data Protection Regulation (GDPR) in the European Union requires a host organization to request and document consent to store personal information. Even if your organization is not based in the EU, following GDPR guidelines is a best practice with regards to personal information collected during the event registration process.

Note: This document is simply a starting point for understanding registration processes and policies. Please consult legal counsel for final approval of any data collection policies and privacy notifications.

(Step 5): Test System and Launch registration

Important! Test your registration system and ask others not familiar with the set up process to register for the event to test for user friendliness, typos or other components. DO NOT LAUNCH YOUR REGISTRATION TO THE AUDIENCE WITHOUT TESTING.

Be sure to clear all data from your registration system prior to launching.

Refer to your marketing plan and launch registration to your prospective audiences.

(Step 6): Monitor Event Registrations through a Weekly Pace Report and Communicate to Stakeholders

1. Create a weekly pace report for registrations by category. Pick one day of the week to run the registration total pick up and share the report to key stakeholders.
2. Run registration report for all categories
3. Ensure financial totals match up with categories
4. Determine if pacing per category is tracking along your budgeted revenue per category
5. If registration is not pacing to your budgeted goals, revisit the event marketing plan to determine where you can create more promotion, incentives, etc.
6. Provide stakeholders with weekly report at same time every week and highlight key points in the data so everyone is aware.
7. Review cash handling to ensure financials are in order.

Best Practices in On-Site Registration

Important goals for on-site registration is ease, convenience and quality customer service. This is the first in-person interaction with the event. In order to make a good impression, strive to minimize lines, encourage a welcoming atmosphere and ensure attendees have what they need for a good experience.

(Step 1): During your venue site visit, work with your event manager to determine the best location for your on-site badge pick up and registration. Ensure you discuss the following;

1. Counters/tables needed—ensure at least one counter is an accessible counter
2. Electrical for printers
3. Internet lines to connect to system
4. Chairs/stools
5. Rope/stanchion if needed to create que
6. Signage—pre-registered / on-site registration / Customer Service

(Step 2): No more than 30 days out, order badge holders, lanyard, ribbons, etc. Refer to your registration list to determine quantities.

(Step 3): Determine any other items to distribute to registrants—bags, giveaways, etc.? How will you give these items out?

(Step 4): Determine staffing needs for on-site registration.

1. You should anticipate needing 1 staff person for every 50 attendees. These staff should be well versed in the event and the registration process.
2. Draft a brief job description for registration, what should the staff do, when should they report and where, how should they dress and how should they handle challenges? Who is their main point of contact?
3. Ensure one staff at a minimum is dedicated just to attendee questions/customer service.

(Step 5): Close online pre-registration. The day before the event, ensure your event registration system is closed to pre-event registrations and directs attendees to visit the on-site registration desk to register for the event.

Best Practices in Post-Event Registration Processes

Once the event is over, the attention returns back to the financial and data aspects of the registration process.

(Step 1): Run final registration reports to include on-site registrations and no shows. Break it down by category and share with key stakeholders. Track the final results to the initial event goal.

(Step 2): Include financial reporting for each registration category—track the final results to the initial BUDGETED goal. Ensure all payments have been properly processed.

(Step 3): Reconcile any cancellation refunds, administration fees, etc. according to your policies to arrive at a final financial record of the registration revenue. Share with key stakeholders.

(Step 4): Run any reports to determine useful data for the next event.

(Step 5): Analyze and assess pre-event registration process. What went well? What could be improved? Document these notes for next event.

(Step 6): Analyze and assess on-site registration process. What went well? What could be improved? Document these notes for next event.

(Step 7): Deactivate registration system/close event and save all final reports for future use.

Marketing and Promoting Your Event—An Essential Overview

Summary

Attendee, exhibitor and sponsor acquisition for your event requires a realistic and detailed marketing plan.

You will need three primary resources to develop your event marketing plan:

- Your event goals and objectives—this should include your desired audiences
- Your event agenda and attendee experience
- Your budget IF you already have a defined amount to spend on marketing. In a perfect world, your marketing plan should be completed before your final budget is completed.

Key Questions to Develop Your Event Marketing Plan

1. What is my event's VALUE PROPOSITION? In other words, why should my target audiences attend? There might be different reasons for each audience.
2. What do I know about my target audience/s that will help me speak directly to them?
3. What are the primary communication vehicles to get my event's value proposition to my audience?
4. What is the proper marketing cadence and sequence of messaging for my audience? For example, does your event offer an early registration discount? A special incentive to register by a certain date?
5. Can you obtain testimonials about past events or various aspects of your programming?
6. How can IFT Help?
    a. Use the resources on the Amplify page: https://info.ift.org/amplify-ift
    b. Submit your event to the IFT Calendar: https://www.ift.org/events/submit-an-event
    c. Submit a request for IFT to promote your event via email and in Food News Now

Best Practices in Developing a Simple Event Marketing Plan

(Step 1): Begin with the event profile and overall goals/success metrics

(Step 2): Define the target audience/s. List everything you know about them and create a target "persona". This persona will help you personalize and tailor everything from the tone of the message to the communication vehicle.

(Step 3): Define the value proposition of the event for each of your target audiences. Very simply, ask WHY should they participate in the event? What is in it for them? What specific elements of your event would attract them to attend? What can't they get anywhere else?

(Step 4): Craft messaging and use testimonials, videos, if available. Highlight all the most unique and valuable elements of the event and the "what's in it for me?" for EACH of your target audiences.

(Step 5): Outline the communication and distribution channels for your target audiences. For example, social media channels, email, cross promotion, web site, industry event calendar. Ask your biggest supporters to help you promote your event to their colleagues via their social media channels. Don't forget to create an official hashtag for your event.

(Step 6): If not already provided to you, create an eye-catching yet professional, graphic look and feel—be consistent or follow host organization branding and style guides; You should have an event logo for any digital marketing and on-site signage. Distribute your official logos/graphics to vendors as necessary along with how to use the logos.

(Step 7): Create a timeline of marketing activities with responsibilities. Do not bombard your total desired audience with the same message repeatedly always focus they message on the new, interesting, unique and valuable experience they will receive.

(Step 8): Measure and evaluate your tactics post event. Were you successful in meeting your attendance and exhibitor goals? Evaluate and note any marketing opportunities you did not think of that could be incorporated next time.

Event Operations and Logistics

Summary

Planning event operations is where you will spend the majority of your time planning your event. The purpose, size and scope of your event will dictate how deeply you plan each of these major event operational elements:

- Food and Beverage
- Audio visual
- Room set up
- Speaker and presenter management
- Signage and Décor
- Security
- Temporary labor or volunteers

All of the above information will be included in the Event Specifications Guide, described below.

Organization during this phase of the event planning will assist in a smooth flowing event on-site. The goal during this portion of event planning is to **document with detail** (requirements, service expectations, designs) and **communicate clearly** (to venue, vendors, staff and stakeholders).

Group Resume and Event Specifications Guide (ESG)

This is the "Playbook" for your event, where all of your event's information lives and shared with all appropriate vendors to communicate your event requirements. <u>All event venues and vendors will expect this document prior to your event.</u>

The best practice in Group Resumes and ESGs is to organize and complete them in this order:

(Step 1) Group Resume

Overview of host organization—WHO is hosting this event and why?

Attendee profile—WHO is attending? How many are expected? Where are they coming from? Will they require a lot of parking availability? Do you expect them to eat in the hotel restaurants? Being as specific as you can allows the venue to provide the best service for your guests.

a. Exhibitor or Sponsor Overview
b. Key contacts
c. Billing instructions—who are the invoices sent to?
d. Specific policies and initiatives of the host organization
e. Any shipments or deliveries that will occur to the venue
f. Any hotel guest housing lists if applicable
g. A copy of the full final program/event agenda

While all questions might not be relevant to your event, this document will provide you with insight on what information venues need to know:

(Step 2) Event Specifications Guide (ESG)

a. Function sheets—a thorough explanation of everything happening in an any element of your event—date, time, food and beverage order and amounts, rooms sets, audio visual, internet needs, signage, etc. These are what you will use to double check everything is ready to go per your specifications before the event starts. Each event element/activity/session within your overall event should have a function sheet including move-in and move-out and badge pickup/ registration area.
b. Banquet Event Orders (BEOs)—catering orders from the hotel or venue
c. AV orders
d. Electrical orders
e. Room sets
f. Utility orders—electrical, telecommunications
g. Furniture or décor orders
h. Signage list and locations of signage
i. Security schedule
j. Emergency plan
k. Production schedules for move-in and move out

Events Industry Council Accepted Practices Exchange

Example of an Event Specifications Guide

Food and Beverage Best Practices

Work closely with your Catering Manager for all of your event's food and beverage requirements. It is their job to ensure you have all the options for your event and that all is managed successfully on site.

(Step 1) Review your event program budget for food and beverage

(Step 2) Determine requirements for your program or session, such as timing of the function, and if you require coffee service, breakfast buffet, sit down luncheon or dinner buffet, for example. Include numbers of guests and any other requirements such as a speaker/s or entertainment.

(Step 3) Provide information gathered in steps 1 and 2 to the venue's catering manager who will then provide you with room set up diagrams and menu suggestions within your budget.

(Step 4) Confirm room sizes and set ups are accurate—a site visit at this stage to confirm is appropriate.

(Step 5) Confirm minimum service requirements with the catering manager—see table below.

(Step 6) Review menus and expected guests and room set ups to ensure they are what you require.

(Step 7) The catering manager will provide all of the final information back to you in a Banquet Event Order (BEO) for signature.

(Step 8) Check with the catering manager on the policies to provide final food function guarantee numbers—this is what you will ultimately pay for, so make sure you are comfortable with your final guarantee numbers. The average "no-show" number is 3%, but varies by group and event. This is usually required by the caterer a minimum of 72 hours before the event. The caterer will also provide a guaranteed overset in case of unexpected additions.

IMPORTANT: BEST PRACTICES IN DIETARY RESTRICTION MANAGEMENT FOR FOOD FUNCTIONS

1. On your registration or sign up form, ask for the individual's dietary restrictions or food allergies. This will give you an indication of your group's needs for your caterer.
2. For all menus, ask the caterer to be as detailed as possible as to the food's ingredients
3. For all buffets, clearly label all food on the buffet
4. Indicate whether something on a menu and all buffet items is VEGAN, VEGETARIAN, GLUTEN FREE, TREE NUT FREE, DAIRY FREE, SOY FREE
5. Strive to meet your guests' dietary restrictions in the most discrete way possible, for example, if you plan a seated dinner, offer your gluten free guest a small card that says GLUTEN FREE when they pick up their name badge to offer the server at sit down. In this way, the server will deliver the appropriate meal to the guest along with the other meals.
6. Ask your catering manager's assistance in managing dietary restrictions for your group.

Food and Beverage Service Standards

Beverage and Bar

- Cash bar—attendees pay for selections that the host is offering directly to the bartender. The host still pays for the bartenders, set up, service fee. The cost per drink to the attendee can be negotiated in advance and may or may not include gratuities. Consumption for a cash bar averages 1 ½ drinks per person per hour. (Professional Meeting Management Sixth Edition 2015)
- Hosted or "Open" bar—host pays for the beverages at a cost negotiated with the catering manager at the end of the event based on consumption or how many drinks were ordered. Average consumption at hosted bar events is about 2 to 2 ½ drinks per person per hour.
- Hosted per person bar package—an all-inclusive price per person per hour—this may or may not include gratuities or bartender/service fees.
- Don't forget service charges and sales tax for beverage bars. Venues will typically charge $100-$150 per bartender for a two-hour event.
- Best practice—schedule 1 bartender for every 75 people for better service, yet reduce overall consumption. 1 bartender for every 100 guests is an industry standard but typically results in slower service and longer lines which leads to dissatisfaction.

Alcohol Liability Exposure

- Understand the state liquor laws and discuss with your catering manager
- The catering contract should include language for responsible liquor service including:
  - No service to intoxicated guests
  - Proof of age via valid ID
  - Indemnification and hold harmless clause releasing the host organization from any liability that results because of alcohol consumption
- Request caterer use pour-control methods of one ounce of liquor per mixed drink and request that caterer uses trained bartenders and servers.

Audio Visual Best Practices

Audio visual (along with food and beverage) for events is one of the more expensive requirements, but can truly elevate the look and experience of the overall event.

At its core, audio visual or AV, is any or a combination of the following:

- Lighting—spotlights, up lights, special effect lighting
- Audio—sound, speakers, microphones
- Visual—video projection of graphics, slideshows and video playback, screens of all sizes

Each of the above categories has equipment that is required for different outcomes. Your event goals and objectives will dictate your AV budget and AV plan.

Your selected event venue will most likely have a preferred list of audio visual vendors who have worked in the venue and understand the space well. Take advantage of this experience and work closely with your AV vendor to explain your desired outcomes and budget.

(Step 1): Review your AV budget

(Step 2): Outline each session or component of your event where you will require:

a. Sound to be amplified (presenters or music, DJ, etc.)

b. Visuals to be projected

c. Anything to be lit

(Step 3): Include how many speakers/presenters you will have at each session and the overall timing of the session.

(Step 4): Do you require a riser or stage for your event? A lectern on the riser? Describe your vision to your AV vendor.

(Step 5): Provide information in steps 1 through 4 to your AV vendor and request room diagrams of seating, staging, where screens will be located in the room, etc. Inform your AV vendor of the rehearsal/walk through times, so that this can be included in set up schedule and labor rate. Ask your vendor to clearly outline AV labor vs. AV equipment and denote labor times. Straight time, overtime and double time will depend upon your program timing and the labor jurisdictions in your area. Rely on your AV vendor to explain and detail all of this information.

(Step 6): Your AV vendor will provide suggestions, diagrams and a quote.

(Step 7): A site visit to verify and confirm all is appropriate at this time.

(Step 8): Accept and sign your AV quote

(Step 9): Request a PRODUCTION SCHEDULE for your event AV so you are aware of move in, move out, etc.

(Step 10): A minimum of one week out of your event, provide your AV vendor with all event PowerPoint slides, video file links, rehearsal schedules, walk in music files, teleprompter scripts and all other assets.

Best Practices in Room Sets

The room set is the environment for your event and should be included on your function sheet. Careful consideration should be given to room sets. Ask the following questions:

- What are the goals? Learning? Networking? Brainstorming?
- What size room/s are available?
- Do you require AV in the room?
- Are you having food and beverage in the room?

Facilities, hotels and other venues will provide tables and chairs as part of the rental fee. There are myriad options of how to configure those tables and chairs in order to meet your event needs.

- Each function or session or activity in your event should have a physical room set up indicated on your function sheet. This is how your venue will know how to set up your room.
- Take into consideration windows and natural daylight—are there shades or blackout curtains to avoid glare with any visuals?

- Work with your AV vendor and venue/catering manager to design the best space for your event goals

Best Practices in Presenter and Panel Management

Your event goals and program agenda will dictate the types and number of presenters you have in your event. Regardless of the topic or number of presenters or panels in an event, there are basic best practices in managing these important aspects of your event to ensure success.

(Step 1): Identify the speakers and panelists per session and create a Master Presenter Spreadsheet to keep track of all necessary details.

(Step 2): List all presenters and panelists by session with all contact details.

(Step 3): Develop and request to sign a standard presenter agreement that includes:

a. Date and time of engagement
b. Duration of presentation
c. Topic and title of presentation
d. Format of session
e. Level of audience
f. Preferred room set
g. Compensation if any
h. Dates for submitting marketing information such as bio and photo and key dates for planning and briefing calls
i. AV requirements (or, list what you will provide standard in the room, such as projector, screen and microphone).
j. Copyright and intellectual property provisions
k. Recording release

(Step 4): Collect all information from presenters as dates dictate and keep organized by session

(Step 5): Assign a subject matter expert as an ambassador to each presenter and hold briefing calls in advance as necessary

(Step 6): Communicate to all presenters and panelists the relevant day of event details one week before session

(Step 7): Assign a volunteer, subject matter expert or other stakeholder to the session to meet and greet the presenters and panelists, and present them to the audiovisual team for microphones and content check. Presenters and panels should be asked to arrive one hour to 30 minutes prior to the session starting depending on the number of the presenters and the complexity of the session.

(Step 8): Post event, send all presenters a thank you letter along with any evaluation/survey feedback.

Steps to Managing Event Volunteers

Volunteers may perform the same functions as temporary labor, but should be obviously given more care and consideration.

(Step 1): Work with your event stakeholders to determine their needs and review the needs of the event.

(Step 2): Write job descriptions for each volunteer area along with the time commitment.

(Step 3): Create a form and recruit your volunteers well in advance. Think about offering some sort of incentive such as a registration discount and make sure you have a deadline for volunteer sign up.

(Step 4): Reconfirm with your volunteers a minimum of six to four weeks out, their commitment and volunteer description.

(Step 5): One week prior to the event, send final volunteer details such as when and where to check in, what to wear and who to contact in case of emergency.

(Step 6): Dedicate a room on-site at your event for Volunteer Check In. Provide beverages or snacks as a courtesy. Use this room as a base to distribute information, communicate key points or just relax.

(Step 7): Assign a team member to oversee volunteers to ensure they are doing what is required.

(Step 8): Post-event be sure to thank your volunteers profusely.

Event Emergency Plans

Summary

Creating an event emergency plan is a necessary part of your event planning process as it outlines steps to take in the event of emergencies. Analyzing risks and preparing action steps in response to various types of emergencies and stressful situations helps protects your attendees and you as the host organization.

Note: This primer is not an exhaustive how-to instruction. There are several variables to developing emergency plans for events and there is a not a "one-size fits all" approach.

Best Practices for Event Emergency Plans

Event emergency plans include:

An event overview—purpose of event, dates and location, number of attendees, attendee profile

- Key contact information
- Risk Assessment—natural, accidental, intentional
- Incident protocols—for each
- Communication tree

- Event agenda
- Floor plans
- Maps
- Venue emergency plan
- Incident report and instructions

(Step 1): Risk Assessment

Start by understanding the potential risks for your event and work to either accept, reduce, mitigate/manage or avoid the risk altogether.

Below are three main areas where risks live for events and examples of each (not exhaustive):

Natural Risks	Accidental/Unintentional Risks	Intentional Risks
Earthquake/Volcano	Human accident or sudden illness	Active shooter
Flood	Hazardous spill	Terrorism
Wildfire	Explosion/fire	Labor disruption
Hurricane	Power outage	Data breach/system hack
Snow storm	Transportation accident	Violence/riots
Tornado	Equipment loss	
Pandemic or disease affecting humans	Computer crash/data loss	

(Step 2): Identify the key risks to your event and rank from most likely to least likely and develop protocols for each.

For example, a 3,000 person, three-day international event held in January in Boston is likely to have weather risks such as snow and ice storms. What are the protocols to monitor the weather, postpone, delay or cancel all or portions of the event, assist attendees with travel or other needs? Will a snow storm cause power outages? Does the venue have a backup generator?

As another example, what is the protocol if an attendee suffers a cardiac episode at the event? Does the venue have portable defibrillators? What is the emergency number for the venue to call 911?

(Step 3): Create a communication tree with the main contact for the organization at the top and who communicates to who. Also include a media spokesperson.

(Step 4): Include your venue's emergency event plan with your overall plan

(Step 5): Include maps and floor plans of your event indicating evacuation points and emergency exits

(Step 6): Train your events team on how to respond in case of emergency, have a copy of the emergency plan at registration and all main spaces of your event. Review the emergency plan with your events team.

Once your emergency plan template is complete, be sure to distribute it to all stakeholders, the event team and include it in your Event Specification Guide.

On-Site at the Event: Best Practices in Execution

Summary

Your successful pre-planning will yield a successful event. On-site management is simply moving through the plans you have made and troubleshooting when necessary.

Successful on-site management can be broken down into five areas:

1. **Documents**—guides, instructions and event details communicated thoroughly
2. **Team meetings schedule and communication**—pre-event and on-site to keep the information flowing and assist in troubleshooting
3. **Event set up**—ensuring all is set up according to your Event Specification Guide
4. **Monitor and correct**—monitor the event and correct situations when necessary
5. **Capture and document feedback** while at the event

(Step 1): Event Documentation—Prepared and Ready

Before you event set foot at your event venue, your documentation must be organized and ready. Best practices for event documentation involve gathering all plans in place which is easily accessed at any point during set up and the event. Whether this means you have all of your event documentation in PDF format and on a mobile tablet, or you prefer to carry it all with you in a paper format, you should have all information at your fingertips.

Follow these procedures to ensure you have everything you need WHEN you need it.

(Step 2): Team Meetings and Communication

Keeping the communication channels flowing is essential to a well-executed event. It is strongly recommended that the following meetings take place regarding the event:

1. Pre-Event Team Meeting—this is where you gather the stakeholders and those who will be working the event.
    a. Hold this meeting no earlier than one week prior to the event to catch last minute changes or instructions.
    b. This meeting should be an orientation, informational and an opportunity to ask questions.
    c. You should provide your Team Staffing Guide a minimum of one week prior to your team meeting in order to give the team an opportunity to read, review and be ready with questions.

2. Venue Meeting (or “Pre-Convention/Pre-Con)—this is the opportunity to introduce your vendors to the venue and meet venue representatives who will help execute your event.
    a. Include your key vendor contacts and ask them to intro themselves and their role in the event
    b. Include your key team members/stakeholders
    c. Your venue representative is typically responsible for creating the agenda and running the meeting, but ensure you can speak to the host, the purpose of the event, who the attendees are and your main points of concern.
3. Daily Meetings—if applicable for multi-day events.
    a. Include key team members and vendor reps only
    b. Keep to 30 minutes maximum and discuss any issues/feedback
    c. Use information at these meetings to make event corrections as needed

(Step 3): Event Set Up

Based on your move-in / move-out schedule, your Event Specification Guide and your event floor plans, allow your schedule enough time to monitor the event set up. Many corrections can be made at this stage rather than waiting until the event is completely set up.

Set-up checklist:

- ☐ Is our set-up on schedule? If not, why and what can be done to get back on schedule?
- ☐ Looking at my floor plans and drawings, is everything where it needs to be?
- ☐ Are my room tables and chairs in the correct quantities and in the right places?
- ☐ Are my signs and banners in the correct places?
- ☐ Do my areas have everything they need for supplies? Registration, Staff Office, etc.
- ☐ Has my shipment arrived and are all packages accounted for?
- ☐ Is the venue clean and ready to welcome guests?

(Step 4): Monitor and Correct

All of your detailed pre-planning and set up checks have been complete and now it’s event time. At this point of the event, continuous monitoring is essential and you may have to course correct.

During the event, check for:

- ☐ Long lines—what’s holding up the process and what can be done to speed it up?
- ☐ Check the food and beverage for correct order quality, quantity and cleanliness
- ☐ How’s the temperature? Too hot? Too cold?
- ☐ How’s the lighting? Does it need to be adjusted?
- ☐ Room refreshes—cleaning off of tables
- ☐ Trash cans—are they full and need to be emptied?
- ☐ How’s the sound? Does it need adjusting?

The goal is to deliver what you promised attendees and ensure they are safe and enjoying themselves.

Paying attention to the small details while the event is occurring will assist you when it is time to pay the invoices. For example, did you receive everything you ordered in your lunch buffet? You would not pay for missing items.

(Step 5): Capture and Document Feedback

Before the event, ensure there is a process in place for all team members to take notes on issues, and what can be improved next time as well as big wins and great experiences. Also pay attention to vendors or fellow team members who went above and beyond at the event. This type of feedback is extremely helpful for designing the next event.

Designing Post-Event Surveys

Summary

In order to determine whether or not the event's objectives were met, it's necessary to design, distribute, collect and analyze event feedback.

Designing a post-event survey should be done with actionable data in mind. In other words, what will you do with the feedback you are asking for?

The post-event survey can provide a wealth of information to:

1. Challenge assumptions
2. Make an event more efficient—operationally and financially
3. Make future improvements

Event surveys do not need to be complex or complicated be effective and actionable. It's about asking the right questions to the right people, and of course using the information you collect to improve your events.

Your event goals and objectives should drive the design of your post-event survey to two primary groups:

1. Attendees
2. Exhibitors and sponsors

In addition, be sure to gain the feedback of your stakeholders and the team who helped to execute the event.

Reconciling Event Invoices

Summary

An important aspect of event close out is reconciling your event invoices and event financials. The event is not closed until the host pays all invoices and receives paid receipts, as late in-coming bills from vendors can cause the financial bottom line of the event to be reduced.

In addition, careful reconciliation of event invoices will allow you to catch any unintentional billing errors, saving the organization money.

Reconciling invoices should be done in a timely manner and it should take no more than 30 days to close an event from a financial perspective. All stakeholders are eager to know the outcome of the event and that can't be communicated until all revenue has been collected and all invoices have been paid.

Best Practices in Reconciling Your Event Invoices

(Step 1): PRE-EVENT, request all vendor invoices are to be received no later than 10 business days post-event. Clear communication of this request to your vendors from the beginning (in fact, put it in your event vendor contracts!) will assist in timely payment for them and timely financial event reconciliation for you.

(Step 2): Gather your necessary documents:

1. **Your event budget**—create a column for actual expenses. This is where you will enter the final amount paid vs. what was budgeted, providing a positive or neutral or negative variance. Ensure your budget reflects any paid deposits.
2. **Your list of expected event vendor invoices**—most of your expected event invoices will be reflected in your budget, however there may be unbudgeted expenses that were incurred. You want this event vendor invoice list to be inclusive of every single expected invoice or report of incurred expenses.
3. **Your event vendor contracts**
4. **Your vendor invoices**
5. **Your Event Specification Guide**—this contains your original orders.

(Step 3): Review each invoice and indicate questions for vendors, if any

- Compare your invoices to your orders in your Event Specification Guide line by line and note any questions or errors. This is where your on-site monitoring of the event will be helpful.
- Review your vendor contracts, if necessary to understand a particular charge, for example, a 22% service charge on catering would be in your contract.
- Send any questions to your vendors or schedule a meeting to review the invoice.
- Do not hesitate to ask your vendors to explain a charge or provide more detail.
- Ensure the sales taxes are appropriate, if tax-exempt, be sure to notify your vendor.
- If invoice require corrections, ask the vendor to reissue correct invoices.
- Cross check your event vendor invoice list to make sure all event invoices have been received.

(Step 4): Pay all final invoices and record payments in budget

Measuring and Communicating Event Success

Summary

Truly understanding whether your event was successful and reporting results to stakeholders is often a forgotten task. It's important to verify where event goals and objectives were met or not met in order to improve.

Measuring event success can take many forms and success metrics should be established at the beginning of the event planning process, in the Setting Goals and Objectives phase.

Key Questions to Measuring Success

In addition to post-event survey results, taking a step back to look at the overall success of the event can help communicate to stakeholders the event's worth—in terms of time, effort and money.

Ask the following questions and document the answers for the next event planning phase:

1. What did success look like at the beginning of the event planning process? For example:
   a. A financial goal? What was the goal?
   a. An attendance number? What was the successful attendance number and what did that number mean to the event?
   a. Was it an overall satisfaction rating? What was the rating and why?
   a. Number of exhibitors

An easy way to communicate an event's success metrics is with a simple chart.

Success Metric	Result	Success?	Dig Deeper
Net $50,000 from the event	$40,000	No	Are we charging too little? Or do we just need more attendees?
300 attendees	226 attendees	No but we're close	Have we done all the marketing we can? Was it the event timing? Have we tapped out the market?
85% very satisfied or satisfied	30% very satisfied	Yes!	We are providing value, but should not take that for granted, can we move the needle next year to 40% very satisfied?
100 table top exhibits	62% satisfied	No, but we're close	Did we do enough marketing? Was the marketing message resonating? Was the price too high?

2. In what other ways do we know if an event was successful? Often, an event's successes are less tangible and more nebulous, such as the following criteria:
    - Was the vibe of the event positive, energetic and welcoming?
    - Did we effectively manage and avoid risks?
    - Did we create positive relationships with vendors and other business partners?
    - Were we able to reduce our carbon footprint by recycling our event materials?

Communicate the Results to Stakeholders

In the spirit of transparency, it's important to document and communicate all aspects of where the event succeeded and where it did not meet expectations. This keeps all stakeholders engaged and supportive, as well as assists with future strategic planning.

While it may seem like one more item to complete in the process, the importance of communicating successes and areas in need of improvement can't be understated.

Send to the event stakeholders the following information post-event:

1. Financial results
2. Key Success Metrics grid
3. Copy of survey results and actionable items resulting from the survey