

## Group Planning Check-List

### Pre-planning

- Determine the size of the group
- Any special needs.
- Meeting Dates.
- Are the dates firm or flexible?
- Create an outline for each meeting session or activity (include # of attendees, seating arrangements/set-up, starting and ending times, and audiovisual and production needs)
- F&B requirements for each day (buffet vs. plated, break-outs, regular meals vs. meeting needs)
- Air transportation
- Ground transportation
- Group activities and/or team-building exercises.

### Budgeting

- Determine which expenses will be assumed by the meeting or event sponsor and by the attendees.
- Create a ledger outlining all expenses (air and ground transportation, accommodations, special food and beverage, entertainment and recreation, taxes and gratuities, decoration/service charges, audiovisual equipment)..
- Make sure funds are allocated to pay all suppliers. Establish a holding account for accrued program expenses.

### Booking

- Determine needs that might make a particular destination more preferable.
- Choose a convenient location based on where your guests are traveling from, their travel time and cost to reach a destination, and a site near air and/or ground transportation.
- Be aware of seasonal hotel occupancy rates, room taxes and recent changes in supply or demand that will affect your expenses. Schedule around big conventions or festivals that could limit Occidental's room supply and services during your meeting or event dates.
- Check flight schedules/frequency to your destination - most participants prefer direct, nonstop flights.
- Determine which Occidental property will best suit your meeting or event needs (location, meeting facilities, restaurants, etc).
- Determine the type and number of guest rooms needed (singles, doubles, suites, etc.)
- Determine the number, layout and size of meeting rooms needed.
- Keep in mind the comfort of your attendees. Consider hotel services that will enhance the stay of special guests or VIPs and advise the hotel as soon as this information becomes available to you

## Submitting Meeting or Event Specifications or a Request for Proposal (RFP)

After the preliminary research is complete, create a Request for Proposal (RFP). This allows a property to see, in writing, the information about your group. Be sure to document all site requirements, including:

- Preferred dates and optional dates (if available)
- Number and types of guest rooms
- Number, size and usage of meeting rooms and the times they are needed
- Range of acceptable rates
- Dates and types of meal functions and breaks
- Exhibits and any other special events or activities
- Any related information such as complimentary requirements

## Inspecting the Site

No facility will look the same in person as it will on paper, nor will you be able to get a sense of service without going to the site. If your budget or time does not allow you to visit the site, the following options are available to you:

- Check with other people, including other planners, to see which properties they've used and which ones they would recommend.
- Use the Internet to view sites, and/or contact the local convention and visitors' bureau for materials, including facility descriptions, city maps, transportation information, etc.

## Planning the Meals

- At events offering food and beverage service, allow enough time for guests to eat leisurely, network or socialize with colleagues or friends and family, and enjoy all presentations or ceremonies, if there are any involved.
- Generally allow 30 to 40 minutes for breakfast, 45 to 60 minutes for lunch, and 20 minutes per course for dinner. For refreshment breaks, allow a minimum of 15 minutes for up to 100 people, 30 minutes for up to 1,000 people and 30 to 45 minutes for groups larger than 1,000.
- Always plan to serve a variety of foods during cocktail receptions. The food should be healthy, appetizing and visually appealing.
- Provide one bartender for every 75-100 people.
- Offer nonalcoholic beverages in addition to beer, wine and premium liquor.

## Room Setup/Configurations

- Conference and Hollow Square:** Appropriate for interactive discussions and note-taking sessions for fewer than 25 people. Many hotels have elegant boardrooms for 10 to 20 people, equipped with full audiovisual capabilities, a writing board, cork board and a flip chart.
- E-shape, U-shape and T-shape:** Appropriate for groups of fewer than 40 people. These are best for interaction with a leader seated at the head of the setup. Audiovisual equipment is usually set up at the open end of the seating.

- **Ovals and rounds:** Generally used for meals and sessions involving small group discussions. A five-foot-round table seats eight people comfortably. A six-foot-round table seats 10 people comfortably.
- **Theater:** Appropriate for large sessions and short lectures that do not require extensive note taking. This is a convenient setup to use before breaking into discussion or role-playing groups because chairs can be moved.
- **Schoolroom or Classroom:** The most desirable setup for medium to large-size lectures. This configuration requires a relatively large room. Tables provide attendees with space for spreading out materials and taking notes.

## Negotiating

- Schedule negotiations early, ideally six months or more in advance.
- Prioritize what's truly important for your group's success before you enter into the negotiations.
- Ask about the facility's peak, off-peak and shoulder seasons, and the days of the week on which it would prefer to book business. If your meeting dates are flexible, you may be able to shift to a time slot providing greater leverage.
- Be aware that Occidental typically give one complimentary room night for every 45 rooms occupied.
- Consider upgrades and/or special amenities and services as important as negotiating dollar savings. For example, upgrading VIPs/special guests to Executive Level rooms or suites at the group rate might be more important than obtaining a greater percentage off the room rate.

## Preparing for Unexpected Situations

- Send your rooming list well in advance, at 30 days prior to arrival.
- Inform guests of the hotel's location and amenities.
- Send your meeting specifications to the hotel at least 30 days prior to arrival, best if done immediately after going to contract. List every meeting requirement, day by day, hour by hour.
- Check the Event Orders (EOs) and Banquet Event Orders (BEOs) from the hotel. Check against your specifications and advise the hotel promptly of any changes or of your approval.
- Hold a pre-convention meeting 24 to 48 hours in advance of the meeting to review event expectations, procedures and to provide an opportunity to meet staff contacts who will help you with any problems.
- Never assume that a request has been taken care of - always double check.
- Work with the hotel to resolve any last-minute changes.