

# Meeting and Conference Planning Tips (Hotel)

## I. Pre-Planning

- Determine the purpose of the meeting
- Consider group size, gender mix and ages, international component and languages spoken
- Determine when the meeting should be held. Rule out dates that coincide with other company events or other industry events or holidays.
- Plan the meeting as far in advance as possible

## II. Budgeting

- Determine which expenses will be assumed by the meeting sponsor and by the attendees
- Create a balance sheet listing expenses for all functional areas of your meeting
- Check budgets from similar meetings to gauge spending
- Consult with your company's accounting office or financial officer on formatting the budget so it's compatible with internal accounting systems
- Secure the signature of a financial officer for any expenditures above what you have budgeted
- Make sure funds are allocated to pay all suppliers. Establish a holding account for accrued program expenses

## III. Booking Your Meeting

### Selecting a Destination

- Choose a convenient location based on where your guests are coming from, their travel time and cost to reach a destination, and a site near air and/or ground transportation
- Adhere to your organization's travel program and current arrangements with preferred hotels and airlines
- Be aware of seasonal hotel occupancy rates, room taxes and recent changes in supply or demand that will affect your expenses
- Consider factors such as weather, security, political/social climate and labor considerations that may affect participation and/or costs of the event

### Finding the Right Hotel

- Determine the type of hotel that will best suite your meeting needs
- Determine the type and number of guest rooms needed (e.g. singles, doubles, suites)
- Determine the number and size of meeting rooms needed
- Choose a hotel with facilities that meet your needs, such as sleeping and meeting rooms, restaurants, sightseeing and recreation options

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

Preparing the specifications is a valuable process because it requires the planner to think about all the needs of the group. Document all site requirements, including:

- Preferred dates and optional dates
- 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**

- Check with planners in other departments of your organization to see which properties they have used and which ones they would recommend
- Use the Internet to view sites

### **IV. Negotiating with Hotels**

- Schedule negotiations early, ideally six months or more in advance
- 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
- Typically, hotels will give one complimentary room night for every 50 rooms occupied
- Consider upgrades and/or special amenities and services as important as negotiating dollar savings. For example, upgrading VIP's/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

### **V. Contracts**

- Share all contracts with your organization's travel manager. Even if you do not sign a contract, you raise your level of liability simply by being involved
- Ask to see a facility's standard contract, noting deposit, payment, attrition, and termination and cancellation policies. Negotiate a final agreement that incorporates their standard language and your organizations
- Make sure you have a binding contract. To be enforceable, a contract must specify definite terms, be accepted by both sides and be signed by people with delegated authority to enter into the agreement
- Check in to any additional costs that may occur due to attrition or shortfall in revenue. Attrition, sometimes referred to as "slippage," can be applied to sleeping rooms and to food and beverage events. A conference facility, having protected space for your meeting, may well be due financial remuneration if your group does not perform as expected
- Look for termination clauses, often referred to as "Acts of God" clauses, that apply when a meeting is stopped because of forces beyond the control of the group of the facility. Generally, there are no penalties assessed to either party in these circumstances

### **VI. Post-Meeting Follow-Up**

- Hold a post-convention meeting with the same people who attended the pre-convention meeting. Evaluate what worked and what did not, review the bills and solicit feedback immediately from the facility
- Ask your attendees to provide feedback about the program content and format, meeting facility, speakers, meal functions and other special activities
- Write thank-you letters to staff, speakers, hotel staff and other vendors

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