

Event Essentials & Managing Food and Beverage Expense

Event Planning Basics

Six Phases

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|---------------------|--------------------------|------------|
| 1) Initial Planning | 4) Pre-Event Preparation | 6) Wrap Up |
| 2) Promotion | | |
| 3) Collection | 5) Onsite | |

Initial Planning

- Obtain speaker name and contact information.
- Collect all pertinent info from that speaker: event description, bio, outlines, preferences and needs, day-of contact details, etc
- Venue selection and/or date confirmation
 - Calendar key dates related to your venue like the day on which menu selections or guarantees are due
 - Identify and contact sponsors to gather necessary details to promote their support

Promotion

This is the stage at which you are going to take all the information you gathered in the initial planning phase and put it into a fun and complete meeting announcement that includes all main components.

- Who (speaker and sponsor information if the council as sponsors)
- What (topic and description)
- Where (event location)
- When (time and date as well as any deadlines associated with registering)
- How (how do your members register, how much is it to register, how to get there, where to park, etc.)
- Schedule of notices

Collection

The bulk of the work in this phase will be related to collecting and monitoring RSVPs and special needs, but there may be other considerations like:

- Collecting details from the speaker to file continuing education credit requests
- Collecting details from your sponsor like their complimentary attendees, whether they will use their literature table, etc.
- Making food and beverage selections

Pre-Event Preparation

- Have and use an event preparation checklist! (Sample Provided)
- Calculate and present your final guarantees

- Final confirmation with the speaker and sponsor
- Prepare board meeting materials (if one is hosted in conjunction with the event)

Onsite

Cleanliness	Restroom care, coatroom, common spaces, tables, carpet, dishware, etc. – check any place your guests will go
Locate	Coat Room, Restrooms, Announcement Board, AED machine, emergency exits
Engage	Speak with the venue, confirming specific requests, menu choices, room set up & event schedule and timing
Assess	Safety risks, looking for trip hazards like cords and wet floors – look up, look down for safety issues
Ready	Be completely ready for your guests at least 20 minutes before their anticipated arrival time

Wrap Up

- Reconcile the financial components of the event / charge cards / deposit checks / invoice unpaid guests
- Post materials online (if necessary)
- Speaker thank you letter or gift
- Minutes to board w/in one week of meeting
- File CEs w/in one week of meeting

We recommend that every council have two policies that are standard for every meeting or event:

- Cancellation and refund, which identifies the scenarios in which attendees are entitled to a refund if they cancel and when they are not
- No-show policy that protects the council financially if someone reserves and does not attend

Venue and Facility Negotiations: Our Four Biggest Peeves

Pet Peeve #1: Nonsense Fees / Terms

- Charge for table linen or to change table linen
- Fee for tables themselves
- An extra fee if you increase your guarantee after “x” date (the late plate penalty)
- Full prepayment in advance
- Fee to bring in outside vendors, like for AV, or requiring in-house AV in certain rooms like breakout rooms
- Early check in fees (hotels only)
- Not meeting the food and beverage minimum means a room charge gets added.
- Easels

- Bartender fees (try to waive if your bar exceeds X dollars)
- Refusal to allow for a consumption bar in favor of bar packages

These types of fees should be negotiated out of the agreement.

Pet Peeve #2: Guarantees

Push back on guarantee clauses with a goal of getting them back to three days, one week maximum. You can provide them with a reasonable estimate at two weeks and contract that in, but the actual guarantee should be delayed as long as possible so that you have the best chance of getting close to your real RSVPs without having a cutoff date.

Pet Peeve #3: Unreasonable Minimums

Counter the original offer with a very low amount and meet in the middle, but under your typical spend.

Pet Peeve #4: Room Rental Charges

Always try to get these removed completely. You are likely to be successful.

Making Food & Beverage Choices and Creative Strategies with Venues

The choices you make when it comes time to pick your menu can have significant impacts on your overall spend. The basics:

- People consume more hors d'oeuvres when they are on a station vs when they are passed
- Buffets provide more flexibility than a plated meal
- If you are doing an appetizer station, make sure the plates are cocktail plates and not salad plates
- Ask the venue to tally drink sales (and make sure they do it and present you with the tally sheets at the end of the event) rather than other methods.
- Do not go with a package bar! Most guests at a professional event will consume around 1.25 drinks for a 90-minute reception.
- Ask the venue to let you know how much food is left based on your order, this will let you plan more effectively for the next event.

Smart food and beverage choices to manage your bottom line:

- Choose a combination of passed and stationed appetizers.
- Beer, wine, alcohol... what's the best choice? Limiting your bar to beer and wine is a cost-saver (and don't forget to make your wine selection carefully). If you are insistent on serving spirits, consider choosing just one specialty cocktail for the evening, rather than offering a full bar.

- Ask the venue what else they have going on... sometimes you can get a reduction in the price if you duplicate the menu from another group because there is a savings related to labor cost.
- You don't necessarily have to choose from the menu.
- Ask the venue to modify it to reduce some of the items within large buffets or multi-appetizer stations and reduce the cost
- For longer events, ask the venue to holdover the leftover breakfast pastries to the morning break, or don't serve the dessert with lunch and ask them to use that as the afternoon break.
- For a plated meal (especially at lunch), ask about eliminating a course like the salad or dessert or modifying a course (change the plated cheesecake to family style cookies).
- Look at the price of what you're ordering. No one will know if you've ordered the least expensive menu options.
- Choose heartier options for appetizers
- If you are doing an add-on, like eggs to a continental breakfast, you do not need to order for your full estimated account, $\frac{3}{4}$ or less should do it.

Managing Guarantees

A guarantee is a commitment to the hosting venue that lets them know how many you anticipate having and may include piece counts for hors d'oeuvres. Once the guarantee has been provided, that number cannot be reduced.

- Most venues are prepared to provide for a certain percent over the guarantee, 3 - 5%.
- Your guarantee does not automatically mean the number of places that will be set for seated functions. You CAN ask the venue to guarantee 30, but set for 35 people, which is easily explainable by saying "some folks won't like to sit together."
- Never provide a guarantee that matches your number of registered guests. You will ALWAYS have no shows; your goal is to get as close to possible for plated functions and for non-plated events, to get as close as actual consumption as possible.
- You must know your history of no shows and walk ins to be effective.

Plated functions

Case study:

- You have 40 registered and you have regular attrition of 12% which takes your expected attendees down to 34-35
- You also have 3% walk in attendance so that's another person, but the venue plans on a 3% overage so that extra person is wash with the hotel's overage
- Your reasonable estimate here is 35-36 attendees / guarantee would be 33 or 34.

We also know that tables will fill up, but certain folks may not want to sit next to others, or two people may want to sit together so you ask the venue to set 6 tables of 6 with a guarantee of 33 attendees plus one table of 6 for overflow.

Some venues will say great and that's that. Others may push back and say that they can't set an extra table because of the pre-set salad and dessert or they simply don't want to do the extra work. What are your options here?

- First, push back. It is reasonable to expect one seat left open at a table or two, creating a need for the extra table.
- The next option is to place a reserved sign on the overflow table and use it only when you have to. In this scenario, the venue would have to move the preset items from another table to the overflow table if it gets used.
- Ask the venue to set that overflow table with only a salad and dessert, rather than increasing your guarantee to the full number of seats.

Non-Plated functions

Basics:

- Know where your guests are coming from and where they are going - are they going to be using the reception as a meal or are they headed home to dinner?
- Know your guests... are they going to stop chatting long enough to eat?
- Factor in the length of the event... you'll need more food for a 90 minute reception than you do for a 60-minute reception
- Not everyone will eat

Choices:

- Always order at least one vegan option plus a stationed choice can accommodate a vegan (or go with two vegan options).
- Chicken is always most popular (and less expensive) with beef coming in second
- Steer clear of pork (dietary needs and preferences) and shrimp cocktail (too expensive and people tend to load up because it's not something they get often at home)
- Seafood is a tossup.

Managing Dietary Needs & Restrictions

Our goal is to provide every attendee with an inclusive, seamless, and tasty event experience that accommodates their dietary needs and reasonable food preferences. Examples of dietary needs:

Actual Disease
Example: Celiac Disease

Food Allergies
Example: Peanut Allergies

Food Intolerance
Example: Non-Allergic Sensitivity to Dairy

Religious Restrictions, Beyond Just Food Choices
Example: Kosher Meal

Lifestyle, Nutrition, and Dietary Choices
Examples: Vegetarian, Pescetarian, No Alcohol

Approach each situation assuming you are dealing with a dietary NEED, not a preference.

You MUST BE TRACKING DIETARY NEEDS and reviewing them before each event.

Common diets:

DASH Diet

This eating plan emphasizes nutrient-rich foods that positively impact blood pressure levels and overall cardiovascular wellness. A cornerstone of the DASH diet is the consumption of fruits, vegetables, whole grains, lean proteins, and low-fat dairy products. - Low sodium

Flexitarian Diet

The flexitarian diet offers a flexible approach to eating that combines the benefits of plant-based foods with the occasional inclusion of animal-derived products. Flexitarians prioritize plant-derived foods like fruits, vegetables, whole grains, legumes, nuts, and seeds. Including occasional animal products, such as dairy, eggs, and lean meats, provides additional protein and nutrients.

Gluten-Free Diet

A gluten-free diet is necessary for individuals with celiac disease, an autoimmune disorder triggered by gluten, a protein found in wheat, rye, and barley, and popular among others for various reasons. To mitigate this, individuals can opt for naturally gluten-free whole grains like quinoa, brown rice, and oats while incorporating nutrient-rich fruits, vegetables, lean proteins, and dairy alternatives.

Ketogenic Diet

The ketogenic diet, often referred to as being "keto", is characterized by a significant reduction in carbohydrate intake and higher consumption of fats.

Mediterranean Diet

It encourages the consumption of whole, unprocessed foods, such as fruits, vegetables, whole grains, legumes, nuts, and seeds. Lean protein sources like fish and poultry dominate red meat, while sugary treats and heavily processed foods are minimized.

Pescetarian

Someone who chooses to eat a vegetarian diet, but who also eats fish and other seafood.

Vegan Diet / Plant Based

Individuals embrace a diet rich in plant-based foods by eliminating all animal-derived products, including meat, dairy, eggs, and honey. Plant-based is vegan, non-processed.

Tips for Working with Hosting Venues:

- Don't be shy about asking for special accommodations or something that's off-menu
- Trust your chef / culinary team, but stay on top of them
- Communicate known needs pre-event needs in writing, including the name of the guest with the specific need
- Label all food, all the time (include dietary accommodations)
- Ask the venue to alert you of needs that you did not communicate in advance

Making Smart Choices: Breakfast

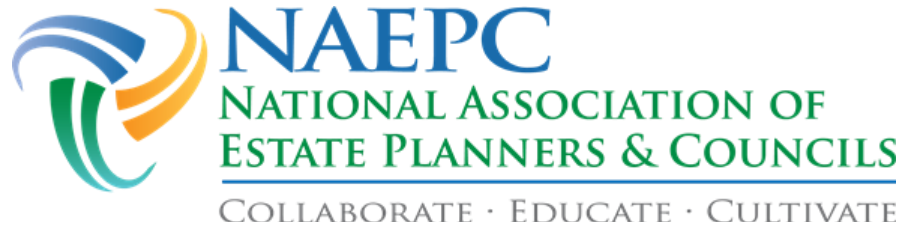
- Try to avoid the continental, it's unhealthy and boring
- Ensure there is protein - scrambled eggs, hard boiled eggs, etc
- Provide gluten free breads for toasting or sandwiches with a gluten free starch
- Make sure some of the yogurt is unflavored, non-fat greek
- If scrambled eggs are offered, ask for a small quantity to be scrambled tofu
- Get creative with choices - make your own breakfast bowl with proteins, toppings, etc
- Oatmeal solves many problems, but you may need to add a protein like nuts or chia seeds

Making Smart Choices: Breaks

- Balance healthy with not healthy - some people want an excuse to indulge
- Provide whole, fresh fruit at every break

Making Smart Choices: Buffet & Plated Luncheons and Dinners

- Always assess what can vegans, vegetarians, and gluten free can eat
- Make creative choices, modify menu options if necessary
- Ask for dressings and all non-vegan salad toppings on side ("build your own") or serve them family style at each table
- Non-dairy salad dressing option



- Rather than a vegan and a vegetarian option, choose just one - and make it vegan

Making Smart Choices: Receptions

- Always assess what can vegans, vegetarians, and gluten free can eat
- Make creative choices, modify menu options if necessary
- Utilize food stations with multiple included options
- Grilled and marinated veggie stations are a better choice than a raw veggie crudite
- Be sensitive to non-drinkers

Final Notes:

- If your attendee's needs are severe, very detailed, or life-threatening, arrange for them speak to the culinary team directly and participate in that meeting.
- Try to push through your own personal food preferences and biases when making selections.
- Not everyone is an adventurous eater

SAMPLE DAY-OF EVENT CHECKLIST

My guarantee is ____ and my guest count is ____.
 We have asked them to set for ____, including ____ reserved tables.

OFFICE/GENERAL ·

- _____ Printed Name Tags
- _____ Extra Name Tags
- _____ Pens, Pencils, Sharpies, Felt Tips
- _____ Scissors, Tacks, Stapler, Pins
- _____ Paper Clips, Binder Clips & Rubber Bands
- _____ Charge Vouchers
- _____ Attendee Lists
- _____ Copy of Announcements
- _____ Membership Applications
- _____ Additional Handout Material & Upcoming Event Information
- _____ Speaker Presentation
- _____ Tax Update
- _____ Signage
- _____ Camera
- _____ USB microphone
- _____ Reserved signs
- _____ Sponsor signage
- _____ Complimentary registrants from sponsoring organization(s)
- _____ Sponsor PowerPoint slide
- _____ Welcome PowerPoint presentation
- _____ Speaker presentation on flash drive
- _____ Prep post-meeting surveys and program sending for 1:30 pm day-of
- _____ Ribbons: Speaker, AEP & Board
- _____ Cash bank

CE SUPPLIES ·

- _____ Pens _____ Sign in Sheets & Certificates of Completion

EXTRAS ·

- _____ Speaker Gift

BOARD MEETING ·

- _____ Agenda _____ Board List & Attendee Information