

Honor Society of Nursing, Sigma Theta Tau International

# Leadership Forum

20 - 22 September 2012 • Indianapolis, Indiana, USA



## Basic Event Planning

It's more than just planning a party!



Sigma Theta Tau International  
Honor Society of Nursing®

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## V. Scott Kerr, CMP

- Ten years of experience in association and university meeting planning
- Bachelors of Science in Tourism, Conventions and Event Management
  - Indiana University, August 2003
- Certified Meeting Professional
  - Convention Industry Council, September 2007

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## V. Scott Kerr, CMP

- Former Meeting and Convention Planner with the Honor Society of Nursing, Sigma Theta Tau International
  - Lead the Operational/Logical Planning for:
    - Biennial Convention
    - International Nursing Research Congress
    - Leadership Summit(s) & Leadership Forum
    - International Leadership Institute Events

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## V. Scott Kerr, CMP

- Deployment Engineer with ACTIVE Network | StarCite
- Indiana University, School of Physical Education and Tourism Management
  - Adjunct Faculty
    - TCEM 271 – Mechanics of Meeting Management
    - TCEM 377 – Exhibition Management
    - TCEM 471 – International Meeting Management



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## Overview

- Needs Assessment
- Meeting Objectives
- Planning
- Implementation
- Post-Event Assessment
- Resources

# What my family thinks I do...





What colleagues and friends  
think I do...



# What clients think I do...





# What it sounds like I'm doing...



# What I feel like I do...





# What I really do...



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## *Needs Assessment:* Review Mission and Vision

### **Organizational Mission**

The mission of STTI is to support the learning, knowledge and professional development of nurses committed to making a difference in health worldwide.

### **Society Vision**

The vision of STTI is to create a global community of nurses who lead in using knowledge, scholarship, service and learning to improve the health of the world's people.



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## *Needs Assessment:* Why & When

- Why meet?
  - Clearly establish why you want to meet
    - Education
    - Networking
    - Celebration/Awards
  - Each chapter required to have two programs per calendar year
- When to meet?
  - Keep university breaks and holidays in mind
  - Check dates with other nursing organizations, local and national

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## *Needs Assessment:* Who's Coming to Dinner?

- What are the reasons you would attend an event? Have those reasons changed as you have progressed as a professional?
- Target Audience
  - Nurse Researcher/Academic
  - Clinical Nurse
  - Nursing Students
  - ...or all of the above
- Generational Differences...Delivery of the Message



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## *Needs Assessment:* Event History

- New Events
  - Does this event already exist
  - Has your organization done something similar in the past?
  - Use your network
- Repeat Events
  - Attendance Figures
  - Attendee, sponsor and exhibitor demographics (if applicable)
  - Actual expenses and revenues from previous event
  - Content, messages and program design
  - Evaluation data

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## *Event Objectives:* What's in it for me?

Think about the last time you went to an event  
and it was NOT what you expected it to be...



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## *Event Objectives:* What's in it for me?

- Provide direction and guidance for all aspects of planning the event, including programming and operational/logistical elements
- Provide the basis for measuring and evaluating the success of the meeting
- Serve as the key marketing messages and a contract between you and your attendee
- Essential to your speakers, facilitators, and others responsible for programming

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## *Event Objectives:* Return on Investment

- Measured in many ways...
  - Monetary
  - Sustained Active Membership
  - Convert Student Memberships to Lifelong Members
  - New Membership Interest

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## *Planning:*

### Timeline...Working Backwards

- **Components to consider:**

- Budget
- Marketing
- Registration/Tickets (design, sales, mailing)
- Reservation of Space (site selection & contracting)
- Food & Beverage (permits)
- Decorations (themes, materials)
- Entertainment (contracts, equipment, facilities)
- Committee business (meetings, communication, administrative)
- Program (sequence, materials)
- Evaluation



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## *Planning:*

### Event Marketing Timeline

- 9 Months: Save the Date
- 6 Months: First Invitation
- 3 Months: Early Bird Registration Expires!
- 2 Months: One Day Sale!
- 1 Month: Reminder to those who have not registered
- 3 weeks: Event Reminder
- 1 week: See you soon and final information
- 1 week AFTER: Recap and Thank You...Next years' date

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## *Planning:* Event Marketing Tips

- Personalize your message...Never start with Dear Sir or Madam...
  - Can't afford an email system? Do e-mail merges in MS Word
- Send different emails and messages
  - Don't blast the same flier over and over
- Send emails and messages to appropriate contacts
  - Once they register remove them from the promotions list
- Learn about spam filters
- Make it easy to register or RSVP



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## *Planning:* Budgeting Basics

- Things to Include:
  - Venue (room rental)
  - Catering or Food & Beverage
  - Accommodation (speakers)
  - Transportation (speakers or tours)
  - Audio & Visuals (projector, laptop, speakers, and/or video)
  - Hand outs, promotional gifts
  - Speaker, entertainer fees
  - Publicity materials, brochures, flyers
  - Staff (management company, registration)

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## *Planning:* Budgeting Basics

- Break-Even, or Profit?
  - Are you not interested in a profit, rather a way to increase/sustain membership?
  - Sample of Budgets Online
- Tax Exempt?



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## *Planning:* Where are we going?

- Eight site selection steps
  - Meeting objectives
  - Historical data
  - Physical requirements
  - Attendee interest and expectations
  - Destination and venue selection
  - Meeting specification and RFP
  - Site review and evaluation
  - Site selection and contracting

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## *Planning:* Where are we going?

- Sources to help you find sites...
  - Convention and Visitors Bureaus
  - Internet
  - Trade publications
  - National/regional hotel chains

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## *Planning:* Contracting Terms

- Food and Beverage Minimum
- Room Rental
- Guarantees
  - Number you will serve
  - Usually due to a caterer 48-72 hours in advance of an event



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## *Planning:* Contracting Terms

- Attrition
  - Difference between contracted number & actual number
  - Slippage = number or percent you can decrease without penalty
  - Overset = amount the caterer will prepare without penalty
  - Tips to minimize attrition
    - History
    - Registration Deadlines
    - Penalties for Walk-in/On-site Registrations

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## *Planning:*

## Contracting Terms

- Force Majeure
  - Events or acts that make a meeting impossible or improbable for either part to conduct the event
  - Greater Force/Acts of God, Strike, Disease or Terrorism
  - Example from International Nursing Research Congress
- Cancellation
  - What is the penalty if you cancel the event?
  - Is there a penalty if the venue or caterer cancels the event?



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## *Planning:* Contracting Terms

- Liability & Insurance Requirements
- Indemnification/Hold Harmless Clause
  - Is the chapter/STTI responsible if someone trashes a guestroom?
  - Unless negligence on the chapter or STTI can be proven



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## *Planning:* Contracting Terms

- Payment Terms & Schedule
  - Credit Card Authorization
  - Deposits
  - Net 30
- Taxes and Service Charges



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## *Planning:* Contracting Terms

- Governing Law
- Construction Clauses
- Assignment of Meeting Space

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## *Planning:* Contract Negotiation

- What to negotiate
  - Food & Beverage Prices
  - Food & Beverage Minimum versus a Room Rental Charge
  - Slippage Charges (attrition)
  - Audio/Visual Prices
  - Guestroom Rates
- What NOT to negotiate
  - Licensee/Lease Agreements (convention centers)
  - Rules and Regulations
  - Taxes
  - Permits with city or state agencies



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## *Planning:*

### Registration: Taming the Beast

- Is registration required?
- Paper, Phone, Fax or Online?
- Online Providers:
  - RegOnline, great for small events. \$4.50 per registration, NOT including credit card processing fees. Event promotional tools included with processing fee...

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## *Planning:*

# Working with Speakers

- Volunteer vs. Professional Speakers
- Speakers Bureaus
- Steps of Booking a Speaker
  - Offer Letter (Affirm)
  - Contract (Confirm)
  - Conference Call to Review Content
  - Final Details (Reaffirm)
  - Thank You
- Audio/Visual Requests
- Copyright Waiver/Conflict of Interest
- Recording/Webcasting



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## *Planning:*

## Food & Beverage

- Why is event being held? Business, networking or social
- Theme?
- Demographics of attendees?
- Formal or casual?
- Type of service?
  - buffet, table service
  - passed Hors d'oeuvres or action stations
  - passed wine/beer or bar service
- Entertainment or presentations?
- Other scheduled activities preceding or following the event?
- BUDGET





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## *Planning:*

### Food & Beverage

- How do we cut costs?
  - “Ganging” menus
  - Small servings for special items
  - Limit overall portion sizes
  - Pass the Hors d’oeuvres
  - Be upfront with your budget, rely on professional advice

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## *Planning:* DRAM Shop Laws

- Did you know???
  - Your chapter and STTI can be held liable if any of your guest become intoxicated and causes injury to themselves, or damage property, or if liquor is served to a minor
- Ways to limit your liability
  - Well written contract
  - Cash bar
  - Drink tickets
  - Serve food
  - DO NOT purchase/serve alcohol without a licensed bartender

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## *Planning:* Event Insurance

- What does STTI Headquarters cover?
  - Liability insurance for events ON your chapters campus and does NOT include alcohol
  - Additional insurance is available, contact headquarters for more information



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## *Planning:*

### Preparing for Emergencies

#### Internal Risk Assessment

- Evacuation, Fire and Security Plans
- You will work with the facility on many of these items
- Program Risk
  - Pharma launch is dependent on FDA approval
  - High-level political speakers or controversial topic covered which could draw protesters
- Attendee Risk
  - Large number of disabled persons
  - Large number of active or reserve military personnel

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## *Planning:*

### Preparing for Emergencies

#### External Risk Assessment

- Destination Risk
  - International meeting held in an area that has history of political unrest
  - Environment
    - 2011 Ice Storm and State Fair Tragedy
- Facility Risk
  - Booked a venue under construction and expected completion is within a few weeks of event
  - Terrorism



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## *Planning:*

### Event Specification Guide

- Event Profile
- Key Dates, Times and Locations
- Key Event Contacts
- Attendee and Exhibitor Profile
- VIPs
- Safety, Security, First Aid
- Housing
- Food & Beverage
- Audio/Visual Requirements
- Transportation
- Media
- Billing
- Authorized Signatories



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## *Implementation:* Pre-Event Meeting

- Introduce yourself to vendors
- Review meeting schedule and details and walk through meeting space, checking for possible changes. Note locations of restrooms, public telephones, elevators, restaurants, coat check, etc.
- Inspection of rental equipment
- Verify catering guarantee

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## *Implementation:* Set-up

- Registration set up
  - Set 30 minutes before open time
- Place directional signs
- Room set up
  - Room temperature
- A/V equipment set-up
  - make sure lights do not project on screen
  - determine how to dim lights
  - check the sound level on microphones
  - place copy of scripts at lectern
- Catering set-up

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## *Implementation:* During the Meeting

- Meet with speakers upon arrival to review last minute details
- Monitor:
  - room temperatures, lighting and sound
  - food & beverage levels
  - speakers staying within time restraints
  - timing of breakfast / lunch, ensure it starts on time and attendees move onto next event on time



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## *Post-Event Assessment: Evaluation Tools*

- Evaluation Tools
  - Paper
    - Advantages/Disadvantages
  - Online
    - Survey Monkey
  - What to ask?
  - It is just as important to ask why someone did NOT come, as it is to ask why they did.

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## Tools & Resources

The following links and training tools are intended to provide the resources that support chapter leadership and operations.

### Training Tools

- [Leadership Forum](#)  
The forum, 20-22 September 2012 in Indianapolis, will have events focusing on nursing leadership and chapter training. The chapter sessions will take place on 21-22 September, and focus on chapter operations, engagement, technology and STTI benefits.
- [The Circle](#)  
Take your chapter website to the next level
- [All Chapter Officers Workgroup](#)  
Post questions and best-practices for other chapter leaders! The group is accessible from your profile in [The Circle](#)
- [Live Webcasts](#)  
Regular training sessions with topics ranging from trends in membership to chapter management. Visit the [Webcast Participation](#) page for quick tips on successful webcast viewing
  - [August](#)
- [Archived Webcasts](#)  
Several webcasts are recorded and posted.



## Chapter Resources

[Tools You Can Use:](#)  
[Online Officer Resources](#)  
[Tutorial](#) (6:19)

[Administration & Operations](#)

[Awards & Recognition](#)

[Bylaws & Governance](#)

[Chapter Health](#)

[Communications](#)

[Finances](#)

[Inductions](#)

[Management System](#)

[Membership Involvement](#)

[Officer Orientation](#)

[Online Induction System](#)

[Programs & Service Projects](#)

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## All Chapter Officers

[Home](#)

[Group Members](#)

The All Chapter Officers group is comprised of officers from all STTI chapters. The purpose of this group is to provide chapter leaders with opportunities to network, collaborate and share resources.

[edit community settings](#)

### Announcements

#### Early registration deadline extended for Leadership Forum!

By: [Michelle Lilly](#) Jul 20, 2012 9:44 AM

Register by 1 August to receive the best rate!  
Three full-days of educational programming encompassing two "stand-alone" events. One event is focused on nursing leadership and the other is focused on chapter training. Both events will include plenary and concurrent sessions, poster sessions, STTI Info Fair, exhibitors and networking with nurses from around the globe.

Invite members to attend the first half of the forum, 20-21 September, focusing on nursing leadership. The chapter training sessions will occur on 21-22 September. As chapter leaders, you may find it beneficial to attend the entire three-day forum.

[Learn more about this exciting event](#)

options ▼

[Add](#)

### Discussions

### Events

#### Leadership Succession Committee Orientation Webcasts

Jul 23 - 25  
United States

#### "What's in it for me" webcasts

Jul 24 - 26  
United States

#### Webcast: Get More People on Your Committee

Jul 26, 1:00 PM - 1:30 PM (Eastern Standard Time)  
United States

[View the group calendar](#)

[Add Event](#)

### Library

#### Connections - June 2012

By: [Michelle Lilly](#) Jun 12, 2012 3:45 PM

Copy-and-paste news blurbs for your chapter newsletters

#### How to Use Google for your Chapter

By: [Julie Jones](#) May 23, 2012 3:17 PM

<http://thecircle.nursingsociety.org>



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THANK YOU!!!