

# CONFERENCE SITE COORDINATION

It's estimated that 11 million conferences are held every day across this country. That's a lot of time, talent, money and effort expended in group communications.

We *are* a meeting society. Meetings help us to share information, solve problems and make decisions. Conferences and meetings are big business -- in the U.S. alone, it is a multibillion dollar industry. "Well planned, meetings can be a wonderful communication tool" (Jeffries & Bates, 1983, p. xvii). Poorly planned, a meeting can be agony. The purpose of this chapter is to assist judicial educators in making conferences meaningful and productive.

This chapter focuses on large educational conferences which judicial educators conduct regularly. However, the concepts presented in this chapter can be used to plan meetings of any type.

The chapter is organized into six main sections: Conference Fundamentals, Ethical Issues, Conference Site Selection, Hotel Negotiation Strategies, Conference Administration, and Post-Conference Evaluation. This arrangement will help in organizing the various components related to conference site coordination.

With all of these components, it is important that judicial educators plan ahead, considering budgeting, reporting, conference planning and program planning. A planning calendar can be used to chart daily activities. After a year or so, a basic planning cycle should emerge, allowing the judicial educator to more effectively and efficiently plan not only conferences, but the entire judicial education process. The important thing to remember is that the planning and execution of judicial and court personnel education conferences cannot be isolated from other administrative and management activities. They must be considered as part of the whole, in support of and equal in importance to the program planning activity.

## **Conference Fundamentals**

This section discusses the basic fundamentals of conference planning, including alternatives to conferences, budgeting, staffing, and program planning.

### **Alternatives to Conferences**

Conferences cost money and time. There are also hidden costs, including the salaries and benefits paid to judges and court personnel attending conferences and the cost of delaying litigation. Also, judicial personnel must spend time away from their families.

Since judicial education budgets are by no means limitless, these costs must be evaluated. Alternatives to conducting a conference include newsletters, video or audio tapes, *computer links* and *mentor/protege relationships*.

Regardless of their economy, alternatives to conferences lack an essential element of professional development -- interaction with peers. This important element should be considered when deciding whether or not to plan a conference or to use an alternate means of judicial education.

It has been said that there are three types of people -- those who make things happen, those who watch things happen, and those who wonder what happened. Successful conferences can produce people who make things happen. Having decided to conduct a successful conference, the next step is to begin the plan.

## **Budgeting**

Conference budgets encompass indirect and direct costs. Indirect costs, or overhead, include office rent, furnishings, equipment, salaries, fringe benefits and operating expenses. In the private sector, where conference fees are calculated to offset indirect costs, as well as direct expenses and profit, educators must develop *cost centers*. A cost center, simply put, is the total dollar cost (overhead included) of a particular conference. Since judicial education offices are involved in other projects besides conferences that use indirect costs (benchbooks, research, clearinghouse activities, etc.), this section of the chapter will focus on direct conference costs. These include conference materials, shipping, travel, subsistence (participants, staff, faculty and education committee), speaker fees, and meeting room charges (including AV). Subsistence means lodging and meals, whether contractual, reimbursable or non-reimbursable (participant pays).

If a conference budget does *not* include participant travel, lodging and meal expenses, then materials, conference room charges, transportation, lodging, and meals for staff and faculty will be the main budget concerns. The cost of materials includes preparation, printing, assembly and shipping. Conference room charges are direct usage fees, set-up fees, and audio-visual equipment charges. Computing travel expense should be relatively easy; ground transportation and parking costs should be included in this figure.

If the conference will include contractual or reimbursed lodging and meal expenses for the participants, the budget process becomes more complex. Since the cost of each sleeping room and meal or break price is known, as well as the length of the conference, *an accurate estimate of attendance* is the essential ingredient. Several variables affect attendance projections:

- Is judicial and/or court personnel education mandatory?
- Is the percentage of compliance with mandatory education known?
- If not mandatory, can attitude towards education be measured?
- What historical attendance data can be gathered?
- Are there factors influencing “non-attendance” (e.g., election year, poor enforcement of mandatory education requirements, alternative ways to obtain necessary hours, or mediocre past programs)?
- Is money for marketing available?
- Is the real monetary cost to the participant reasonable?
- Have attendance ceilings been placed on conferences? (For 1000 judges, 100 judges per meeting maximum allowed by education committee policy = 10 conferences needed).
- Can registration information be mailed early enough to obtain attendance data before finalizing budget (or the signing of the hotel contract!)?

Accurate attendance estimates allow your budget to be realistic, increasing your credibility with funding sources, governing boards, and hotels.

In summary, the budget planning process for an educational conference is like any other -- known expenses are added to estimated ones. Closing the gap between the two takes work. It is important to develop a list of variables which affect attendance, and always use the word “approximate”!

## **Staffing**

The conference planning function of any organization will be enhanced by hiring conference planning professionals. Not all state judicial education programs will have the luxury of this degree of specialization. Budget permitting, meeting planning specialists can assist the judicial educator by lending their experience in pre-conference planning, conference administration and a host of associated activities. Experience in association management, corporate meeting planning or hotel sales and catering are also valuable backgrounds and can add immeasurably to the success of your education programs. Conference planning professionals can save time, money and, most importantly, diminish the frustration experienced by the novice conference planner.

If the judicial organization conducts as few as six to ten conferences a year, a professional meeting planner can greatly benefit the total program. Smaller operations or those with limited dollars for staffing may still be able to utilize professional services--the meeting planning consulting firm. In the Washington, D.C. area alone, more than 100 firms engage in the business of facilitating meetings. While you might use a particular hotel once a year or once in a lifetime, the hotel knows its chances of repeat business are heightened when dealing with a meeting planning company that, provided the hotel does a good job, will call upon them again when representing another client.

Since these companies are in business, some guidance on their profit strategy is in order. Some companies provide services at no cost. They negotiate a rate at a hotel which has a built-in commission, called commissionable rates. Even with the commission, the rate may be lower than one which the judicial educator could negotiate. Ethical and legal considerations should be examined when using public money to pay commissions. Other companies charge a flat rate for services, which for a large conference could be several thousand dollars. This may still be less expensive than hiring a full-time professional. At any rate, these companies provide an option to in-house staff and may deserve a look.

## **Program Planning**

Since program planning is covered in other chapters, this section will only address its role with conference planning. There are two “rules” that describe the relationship between program planning and conference planning.

“Rule One” is that the conference planning function should support the program planning function. A good program, complete with break-outs and rotating instructors, must have adequate conference space to be effective. “Rule Two” is that unfortunately, “Rule One” doesn’t always work! In some areas of the country, if conference space in a hotel is not secured two years in advance, the judicial educator may be out of luck finding any space. In the ever-changing environment in which the judiciary operates, planning the educational content of the program two years from the conference would be folly.

Conquering these often opposing planning needs is one of the major responsibilities of the judicial educator. *The judicial educator that holds too much space at a facility for too long while waiting to see what the program will look like will lose credibility with the conference facility.*

This section on conference fundamentals focuses on some aspects which may be beyond the control or scope of the judicial educator’s involvement with a single seminar. Understanding some of the basic parts of a conference such as budgeting or staffing can help the judicial educator’s role become more meaningful. For information on all aspects of conference planning, see Chapter 11.

## Ethical Issues

This section discusses several issues surrounding meeting planning ethics. It is not the purpose of this section to make judgment on any particular practice or decision.

In some areas of the country, it has long been a standard practice in the hotel industry to provide incentives or enticements to conference planners in order to secure their business. These include gifts, room upgrades, free accommodations, and invitations to special functions. They can range from a genuine gesture of thanks to a not-so-subtle bribe.

Some conference planners use the policies of: “Under \$5 and can be consumed in one setting” or “If I’d be comfortable seeing it mentioned on the front page of tomorrow’s newspaper.” An office-wide, formal policy towards gifts should be developed.

The first step in developing a policy is to research the law. It may be illegal to accept items of value if one participates in the business decisions of the office. If so, the statute can provide an “out” when confronted with offers. There are advantages to “paying your own way.” For instance, when conducting site visits, judicial educators should make reservations without identifying themselves as meeting planners. A more accurate picture of how the hotel reservation system operates will be revealed. When arranging your inspection, don’t tell the hotel sales staff where you are staying. You’ll get to view a sleeping room that has not been *white gloved*.

In summary, it is a fact of life that, if judicial educators do not take a proactive role in shaping their organizations’ ethics policy, others may judge ethical behavior for them. Programs have been damaged by a retroactive assessment that a practice was unethical. The difficult part of developing an ethics policy is that not everyone that could cause the program harm from ethics violations is under the control of the judicial educator. In any event, ethical considerations surround our every activity. No matter what is chosen regarding meeting planning ethics, actions should be the result of a well-thought-out, carefully developed policy.

## Conference Site Selection

This section of the chapter will focus on selecting the site of the conference. Negotiation strategies, contracts for facilities and pre-conference facility communication will also be discussed.

### The Conference Location

When selecting the location of your judicial education conference, consider accessibility, hotel, affordability, recreation, and major area events. A discussion of these factors follows:

- *Accessibility.* If the conference is regional, participants will likely drive to the site. Accessibility by air may be a concern for staff and faculty. Since it will be known to some degree where staff and faculty will be coming from, a travel agent can assist in making arrangements. In large cities, select areas where participants are not forced to negotiate heavy morning and afternoon traffic. If the meeting is statewide or many participants will fly in, areas around regional airports might be advisable. Since travel anxiety may occur due to the judge's being away from his or her own environment, care should be given to minimizing ground transportation time or traffic difficulties.
- *Hotel Selection.* The basic law of supply and demand applies here. Be aware that major convention areas will have many hotels. This does not mean that competition will drive prices down and that these hotels will eagerly seek your business. These large convention hotels are vying for private sector dollars. They may be reluctant to commit to smaller conferences in hopes of later garnering a larger, more profitable, piece of business. To use these facilities, let the hoteliers assist you in selecting *off-season* or empty dates. Large conventions book many years in advance.
- *Affordability.* Your budget may have a significant impact on where your conference is conducted. Hotels charge more for rooms during peak periods and in the most desirable locations. A good working knowledge of your market area is critical in getting the most for your money. Off-season rates can make many top-end hotels a bargain.
- *Recreation.* Attendees must have time to themselves, especially considering the seriousness of topics at judicial conferences. This is not to say judicial conferences should be scheduled at resorts or near tourist attractions. Not only are these areas pricey, but "conspicuous" consumption may not be tolerated. It is also unfair to place participants near recreational facilities and not give them time to enjoy them. Provide attendees with readily available listings of area cultural events. Relaxing with peers can only strengthen participants' ability to learn in the classroom.

- *Major Events.* Annual festivals, city-wide conventions, and similar “large-draw” events can pose problems with hotel availability. These events take up hotel space and cause discounts to be more difficult to obtain. Fortunately, they are often planned months or years in advance. A city’s Convention & Visitors Bureau (CVB) is the place to start when making inquiries about these special events. CVBs are available in most cities and can assist conference planners in learning about how the city can best suit their needs. They are often funded by taxes on hotel rentals, called “bed taxes.” If you are unfamiliar with a city, CVBs can be a great place to start. CVBs can provide information on hotels, special events, and a variety of conference services. Most CVB services are free.

## **The Conference Facility**

There are two basic groups of conference facilities -- “for-profit” and “not-for-profit.” Since, from a “field observation” viewpoint, most judicial education takes place in a for-profit hotel setting, this section will be primarily directed toward this environment. As the rest of this chapter will address the various aspects of for-profit facilities, a few remarks about not-for-profit facilities should come first.

**Not-for-profit.** Not-for-profit facilities are usually operated by universities. Some universities operate residential conference centers, while many others operate meeting rooms and provide a wide variety of conference services. All university-run conference facilities offer some advantages over for-profit properties. Room rates can be lower. The stimulating atmosphere of a university campus can strengthen the learning environment. Faculty from law schools or human resource development areas are readily available. University settings are often beautiful, creating a sense of escape from the pressures of the bench!

While many excellent non-profit facilities exist, sometimes decentralized management makes it difficult to obtain the needed meeting space, sleeping rooms and catering. Other concerns in these operations can be a lack of standard hotel services such as bellpersons, airport transportation, continuous operation of restaurants, lounges or clubs for after-hours relaxation, parking, and security.

There are three broad types of for-profit facilities: (a) non-hotel, privately run conference centers; (b) resort hotels; and (c) standard hotels. Most resorts and conference centers offer a retreat-like atmosphere, which can be useful in some training. They are often located away from town and are more likely to be surrounded by plant life than asphalt. Resorts tend to be pricey and offer many recreational activities. They can be excellent bargains during off-season.

Two concerns about using resorts for judicial education conferences: first, some may not be accessible and second, no matter how good the bargain, the general public may question using a resort for a conference.

A type of “quasi-not-for-profit” facility readily available is the convention center. These can be found in cities of all sizes. They are usually owned by governmental entities such as cities and counties and are sometimes operated by convention bureaus. When on-site lodging is not required, these can be excellent choices. The judicial educator may have to use a contract caterer and may be faced with numerous incidental charges such as security and set up fees. Another concern is the variety of events scheduled -- a rodeo or livestock show the night before may cause attendees to pay less attention to the program!

The remainder of this chapter will focus on standard hotels. The United States hotel industry is a multi-billion dollar market, with thousands of hotels and hundreds of thousands of rooms. They range from a ten-room tourist court to the 3,174-room Las Vegas Hilton. Conference space is similar in its diversity; size, location, staffing level, occupancy rate, proximity to a major airport, and level of service are some of the variables to consider.

**Hotel selection.** Before developing a plan to select a hotel, one should become familiar with the industry. Understanding how hotels make money is critical. A hotel’s primary source of revenue is sleeping room rentals. Don’t threaten a hotel’s income by giving seminar participants a choice of area hotels and then asking the host hotel for special considerations.

Rooms are rented at a variety of rates. The highest rate is called a “rack rate.” The lowest rate is the “athletic rate,” which is based on the four-to-a-room configuration for traveling sports teams. Between these two extremes are the “commercial” and “government” rates. Within each area some flexibility exists. A hotel’s room rate generally depends on average daily room occupancy during the conference. Judicial educators can calculate a hotel’s average occupancy rate by using the formula in Attachment A, which is based on data from their state comptroller.

Because hotel rates are flexible, there are several different rate structures based on occupancy - flat, single/double, and per person. The flat rate is generally the highest because it does not distinguish singles and doubles. The single/double rate is frequently used, but may be cumbersome to deal with, especially if you receive funding on a per person basis.

The per person rate, although sometimes difficult for hotels, provides planners with a direct one-to-one account management system as well as equitable treatment of participants. The rate can be explained to hotels as cutting the flat government rate in half, setting up a double *folio* (billing) system per room, and putting two persons in each room (if double occupancy is required). For a judge

requesting a single room, or wishing to bring his or her spouse, the hotel assesses a surcharge -- the state pays one-half the double rate and the participant pays the balance. Use thorough communication and sample folios, which show hotel accounting and front desk staff how to prepare the folios for your group. Folios are the hotel jargon for the form for customer charges.

Hotels also offer a variety of room styles. An on-site visit is strongly recommended if the conference planner has not previously used a facility. One must keep in mind that nothing is standard; *always check*. Some hotel jargon is, however, standard. A “double” generally means two beds, while a “double double” means two beds with two persons. A “single” indicates a room with one bed. The conference planner should be aware of Murphy beds, sofa beds, or other sleeping arrangements! Hotels offer many types of suites -- executive suites, junior suites, parlor suites, and hospitality suites. When specifying room types, avoid jargon-related misunderstandings.

Often a “room block” may be needed for the conference. This is the number of rooms that a hotel reserves for each day of your conference. High-occupancy hotels are more stringent concerning room blocks than less-busy properties. This concept will be discussed in the section on negotiations.

Finally, the planner must find out about the hotel’s cancellation policy. Most resort hotels require 48 to 72 hours cancellation notice. Stress this to participants and insist on some guarantee for late arrivals (many hotels automatically guarantee conference sleeping rooms for late arrivals). Some hotels are inflexible on the cancellation time but will work with planners if the hotel is not expecting a full house on a particular day.

Hotels also make money by selling food. In 1989, national hotel food service figures topped \$12 billion. While seemingly high, the figure is quite small compared to the total national food service sales of \$400 billion. Even more surprising is the small part of gross sales that is profit -- from 0 to 7 percent -- given the usually high hotel food prices, especially for a catered meal (hotel restaurant menus have a higher built-in profit).

Another way hotels make money is by renting public space. While there is generally no conference room charge (except possibly for additional small break outrooms) when sleeping rooms or meals are booked, the planner should be careful when asking for the appropriate amount of space. Asking for too much denies the hotel the opportunity to book another meeting. Asking for too little or just enough space may not give the flexibility needed to adjust the space prior to the conference.

Hoteliers say the sale of alcohol is a rapidly diminishing source of income. Some hotels consider alcohol revenue as “gravy” and don’t count on it to fund operating costs.

By understanding how hotels make money and how they structure their income-producing practices, judicial educators can prepare themselves for the bargaining table. The next section discusses the conference planner's preparation and examines the "negotiability factor" of hotel services, from sleeping-room amenities and coffee breaks to group meals and room rates.

## Hotel Negotiation Strategies

A strategy is essential to facilitate a mutually beneficial result, a win/win situation where the group receives good service for a reasonable price and the hotel makes a reasonable monetary return on their investment. There are three major steps in designing a strategy: (a) develop a group profile, (b) select "target" hotels, and (c) determine the "negotiability" factors of the group's needs and the hotel's needs. While there are no magic wands to make negotiating painless, careful consideration of these three factors can help in designing a successful conference.

### A Three-Step Process

**Develop a group profile.** The first step in designing a negotiation strategy is to determine the group's profile. This is the most critical element in creating a win/win situation. Examples of this information are the group size, room-use history, no-show ratio, group hotel-type preference, food and beverage expenditures, and how fast the judicial organization pays their bills.

When the negotiation strategy is built upon an exhaustive knowledge of the group profile, several very important things will happen. Planners will be in a good position because they will know what they have to offer; the hotel will be more at ease because the planner is prepared; and the price for the hotel's services may be lower because the hotel knows the account will be easy to administer.

Having complete control over registration can provide the judicial educator with the surest route to a comprehensive knowledge of the group's profile. This means, of course, handling hotel room reservations in the judicial education office. Committing staff to this will pay big dividends in booking future business. Remember, when the planner walks out the hotel's front door after a conference, the hotel is working on someone else's account. It is unreasonable to ask the hotel to provide information about your group's conference months later when the implementation of simple management systems, such as handling the reservation system internally, can give the same, if not better, information.

**Select target hotels.** The second step, selecting target hotels, is critically important. It is doubtful that a 10-room tourist court would fill the needs of a group of judges. It might be likewise inappropriate to target top-end luxury properties. Not every area of the country has every type of hotel. The meeting

planner must carefully analyze the local market. The planner must know the hotel type desired *before* beginning negotiations. This will avoid wasting his or her time and the hotel's time by targeting inappropriate properties. The judicial educator may wish to develop a questionnaire to send to properties in an area. An example may be found in Attachment B.

**Determine negotiability factors.** The third step in developing a win/win negotiation strategy is to develop a list of desirable features for the group. Such a list might include airport transportation, special faculty rates, waiver of meeting space charges, or waiver of parking charges. This list should be divided into "shall" (nondiscretionary), "should" (desired), and "may" (discretionary) categories. An example of a "shall" item might be guest security features, while an example of a "may" item might be to have your meals served in an atrium. Regardless of how important the planner feels an item is, he or she should determine the negotiability factor of each item before approaching the hotel.

The next part of step three is to identify the target hotel's prioritized rules and be familiar with the negotiability factor of each of these. Be aware that the willingness of the hotel to place an item in the "may" category instead of "shall" can fluctuate seasonally or will depend on how much you buy.

## The Hotel's Perspective

Some articles and seminars on hotel bargaining lead one to believe that everything is negotiable. In many cases, this philosophy holds true *only* if there are no plans to use that hotel again! The win/win strategy includes allowing the hotel to make a reasonable profit on the contract.

Four main categories of hotel services are subject to negotiation:

- *Sleeping Rooms.* Room rate, room block and room block location, amenities, upgrades for VIPs, security, safety, complimentary room ratio (if appropriate), cancellation policies, late and early check-ins, late check-outs, and weekend holdovers may be negotiated in most hotels.
- *Meeting Space.* Negotiable items include size, location, set-up charges, use of conference space when the judicial education group is not using it, types of groups in adjacent space (beware of motivational groups, youth conventions and athletic groups!), special needs such as extra risers, drapes, lighting, and audiovisual equipment.
- *Food and Beverage.* Included here are meal prices, menus, gratuities, number of waitpersons, space allotment, style of service (buffet or plated), and meal guarantees.

- *Guest Services.* Negotiable items may include airport transportation, other transportation (malls, restaurant districts), front desk staffing, bellstaff, restaurant hours and menus (lunch menu offered at night), billing to accounts, cost of in-room movies, cost of local telephone charges, hotel long-distance surcharges, parking charges, parking attendants, security guards, and safety deposit boxes.

Remember, none of the listed items are free. While a direct charge may be waived, the service will either be absent or paid for otherwise. The decision as to whether an item's cost is negotiable depends on the hotel's overall financial condition. For obvious reasons, this may be difficult to determine. There can be no substitute for a thorough understanding of how hotels make money and for communication with others who have used the hotel in designing a win/win negotiation strategy.

## Hotel Contracts

To be a successful meeting planner, knowledge of user group profiles, how hotels operate and negotiability of items is critical. All is for naught, however, if the planner doesn't "close the deal" with a binding contract!

Hotels usually contract for sleeping rooms and catering separately. Room rates and food prices may not address default, termination, or other "protective" items. While there are many good hotel contracts (from the hotel's perspective), no substitute exists for using one designed by the judicial organization. Only then can the judicial educator have absolute control over the contents of the contract.

Since laws (as well as hotel markets) vary, the planner should obtain legal counsel knowledgeable in the conference/hotel industry in that particular state. Although regional differences in law and the industry occur, there are several "must" items for any conference contract. These are as follows:

- Approximate number of attendees, both administrative and participants.
- Dates of function.
- Number of sleeping rooms (singles, doubles, suites, rates, reservation deadline).
- Sleeping room guarantee policy.
- Specific conference space with set-up times, audiovisual and special needs.

- Catering needs: menus, prices, times, guarantee, submission and change in guarantee, number of service people, percent over guarantee preparation. Style of service, coffee service (breaks), where meals will be held.
- Pre-conference acceptance and storage of seminar materials.
- Parking charges or waivers.
- Airport ground transportation.
- Tax status.
- Direct billing instructions.
- Default (both the judicial organization's and the hotel's).
- Termination and cancellation.
- Required clauses like AA/EEOC, minority business, officials not to benefit, etc.
- Funding out clause, should the program not be refunded.
- Exclusiveness of this written agreement and the handling of amendments and exceptions.

A well-written contract is important. It is, however, only part of the picture. All aspects of the contract must be thoroughly covered with the hotel's management *prior* to any possible need for enforcement. If everything is not discussed before a crisis develops, valuable time will be wasted arguing points rather than seeking solutions. Both the design of the contract and the review just prior to the conference are equally important. Should staffing change, extra effort should be made to communicate.

In summary, a well-written contract is an absolute must when planning conferences at hotels. They should be designed by attorneys knowledgeable in the state's hotel and conference laws. They should be able to be enforced, but written well enough to be understood, thus preventing the need for enforcement. The contract should serve as a guide for the planner and the host hotel.

## Conference Administration

This section discusses the various aspects of administering a judicial education conference. Since so many variables exist which could affect time frames, registration procedures, and on-site management, an example will be used to illustrate a conference chronology.

This conference will be held at a mid-sized metropolitan hotel. Other meetings will be ongoing at the hotel during the conference. The judges will arrive on Tuesday afternoon, attend class all day Wednesday and Thursday, and end Friday at noon. All meals and breaks will be provided. Lodging expenses for participants, staff, and the faculty and education committee members will be directly billed to the judicial organization, which will handle all reservations.

### Conference Chronology

The first step in administering a judicial education conference is to design a chronology of events. A chronology provides the judicial educator with two essential planning benefits. First, when it is created, it can help the planner look to the future with an eye toward an end product. A chronology can help the planner gain a perspective about the seemingly endless number of details. He or she will be able to make decisions about when to do what in an orderly fashion. The second benefit of creating a chronology is that it will become a checklist as time passes. In the conference business, a planner's credentials are measured by preparedness. Checklists are tools planners use to prepare. Whether an elaborate model is chosen which details how many ice cubes go into a glass, or a general chronology with only major milestones, a checklist is an absolute. The following conference chronology is closer to "general" than to "detailed" and fits the conference scenario presented earlier in this section. An alternative chronology is listed in Appendix 10.

TIME (From Conference)	EVENT
minus 12 to 18 months	1. Conduct search for site, get bids, make selection, and enter into contract.
	Note: While the time frame is flexible, these events must take place early enough to insure availability but close enough to the seminar to obtain firm prices. Site visits should take place at this time.

minus 6 months

2. Make contact with catering department. Advise when function sheets are to be prepared. Check with sales department to reaffirm contact person and to insure the group is on the books. Check room block.

Note: This is one of several references to check to make sure the group has not inadvertently disappeared from the hotel's master booking sheet. Menu selections should also be made if they haven't been made previously.

minus 3 months

3.
  - a. Prepare conference materials for participants, including registration form.
  - b. Repeat 2.

minus 2 to 3 months

4. Mail registration information to participants.

Note: Two to three month's lead time is ideal for conference registration material mailing. Too early and the clientele will delay returning it. Mailing too late will interfere with their ability to obtain discount airfare and to "fine tune" their docket. Because we are involved in judicial education, pay attention to the court dockets. Many dockets are set months in advance. *A general announcement of the course, giving dates, locations, and topics should be sent to the courts as early as possible.*

minus 1 month

5.
  - a. Check on catering function sheets, review and return.
  - b. Send confirmation to successful applicants and regret letter to those turned away, if necessary.

- c. Repeat 2.

Note: This is the time to remind the catering department that function sheets are due and to confirm registration to the attendees. At this time, the actual hotel site should be given to the participants. To advise them of this before they are confirmed could encourage participants to show up unanticipated.

minus 2 weeks

- 6. Send registration list to hotel.

minus 1 week

- 7. a. Ship training materials to hotel.

- b. Call in changes on registration list.

Note: If possible, hand deliver the registration list to the hotel (a follow-up call is a must). Go over list with reservations manager. Confirm method for updating and person to ask for when updating

Note: Again, when shipping material, a follow-up call is obligatory. Be sure the material arrived in good order. When calling in changes, be sure to note the date, time and to whom the change is given.

minus 48 hours

- 8. a. Call in meal guarantees.

- b. Call in changes to registration list.

Note: Meal guarantees are essential to hotels. They will be providing food (which you will pay for!) based on this number. This is a highly negotiable area (until the food is purchased) and varies by region.

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|---------------------|--|
| minus 24 hours      | <p>9. Arrive at conference site the day before meeting begins. In the example provided, this falls on Monday.</p> <p>Note: Arriving a day before any aspect of the conference begins buys maximum time to make adjustments due to unforeseen events. Unscheduled renovations, power failures, labor difficulties or weather problems can best be handled if the planner is already there.</p>  |
| minus 22 - 20 hours | <p>10. Conduct pre-conference meeting.</p> <p>Note: The pre-conference meeting is one of the most critical events of the conference. The contract, catering functions, and other ground rules are discussed at this meeting. The analogy best describing the pre-conference meeting is that of a drama director meeting with the lighting, prop, costume, and other coordinators prior to the play, no matter that the performance is the third of a multi-night run. Remember - <i>professionals will always do this!</i></p> |
| conference begins   | <p>11. Conduct conference registration.</p> <p>Note: Conference registration should be a formal event. It provides a method to collect information, distribute materials and, of course, find out who is coming and who is not. The planner can personally greet the conferees.</p>  |

This chronology is very basic and assumes much (for example, it is a 12-18 month cycle). It may be necessary, in some locations, to begin earlier. Additionally, some time frames for items such as meal guarantees and reservation lists may be contractual.

This chronology shows the major steps in meeting planning. Remember, each of these basic steps should be a starting place for a detailed checklist that covers the what, when, where, who and how of the event.

At the start of the conference, begin a new checklist to insure that the hotel executes the contract correctly. Frequent visits to the front desk to check on arrivals and participant and faculty billing are a must.

## Administrative Checklists

In addition to your event chronology, other checklists should be developed to guide the planner through the different stages of the conference planning process. Some of these are:

- *Site Selection Checklist.* This list will assist in making sure all the essential elements are present when touring hotels. These checklists are particularly useful while checking security features and the appropriateness of the site for the learning experience and will help later when recalling important items when back at the office.
- *Road Office List.* This is a pre-seminar list to make sure essential office supplies are transported to the seminar site. Supplies might include a stapler and staples, markers, pens, a flashlight, blank name badges and holders, overhead transparencies, tape, message pads, etc.
- *Audiovisual Equipment List.* Nothing is worse than a forgotten extension cord or spare projector bulbs!
- *Conference Activity Log.* This document helps the planner know when to check on faculty arrivals, meals and breaks.
- *Room Set-Up List.* A critical checklist, it will contain items such as blackboards, chalk and erasers, water pitchers and glasses, number of chairs and tables, arrangement of chairs and tables, air conditioning and lighting, public address systems and other audiovisual equipment. No other item in the world fits Murphy's Law better than public address systems! A detailed public address system checklist is advisable.

Other elements of the conference planning and implementation process can benefit from checklists. No matter how detailed lists are, however, they are never complete. Checklists are important management information tools. In addition to being guides to execution, they should provide feedback to the planner when they fail to anticipate a particular situation. They are "living" documents -- to be subjected to experience and altered as needed.

## **Post-Conference Evaluation**

Planning is usually defined as preparing for the future. Judicial education conference planners will conduct many conferences in their careers. Planning, then, should be redefined as preparing for the future by applying lessons learned from the past. These lessons are acquired in various ways, and generally referred to in this section as post-conference evaluation.

Judicial educators should develop an understanding of their clientele's needs in conference facilities and activities. An example would be to glance at the bus tubs after a meal to see what foods weren't eaten or ask participants how well they liked certain items or arrangements. Could they hear and see in the conference? Was their room comfortable? Select a variety of people for these informal visits. The purpose of this is that the user profile, a key ingredient in negotiation, will improve.

Conference planners should also understand the hotel's perspective of the meeting. Did the planner try to accomplish the impossible with the conference times? Did he or she communicate clearly with the hotel prior to the conference? Was the judicial education staff knowledgeable about the way hotels operate? The more you know about the hotel's perspective, the more successful you will be.

Formal evaluations can uncover much information. A formal evaluation may mean a participant questionnaire or interview. This feedback can provide information on the seminar and how it was conducted.

It's been said that it's easier to learn from one's own mistakes than from the mistakes of others. Conference planning is no exception. If firsthand experience in learning from others is not available, planners can sharpen their skills through involvement in professional conference planning organizations or reading meeting planning publications. Chapter 1 of this manual discusses this type of professional development.

Outside evaluators can also provide information about a conference. An evaluator should be an experienced conference planner who can attend the entire conference. He or she should also be involved in all pre-conference activities. This independent set of eyes and ears can be most helpful in "sorting out the trees from the forest."

Whether feedback is obtained from one source or several, the success of the evaluation will depend on the planner's ability to listen. Not all the experience or advice received will be helpful. It is the ability to listen and distinguish that which is most beneficial that separates professional conference planners from the novice.

## Conclusion

The information in this chapter is *not* a substitute for experience. No workshop manual or conference planning book will address every eventuality that can be encountered. Instead, this serves as a guide to understanding. Through understanding, experience becomes more usable. This sense of focus adds meaning to our careers as judicial educators.

## DEFINITIONS

**Computer Links:** a computer that has the ability to send information and receive responses from the user.

**Cost Center:** the total cost (including overhead) of a project. The cost center is critical when determining user fees.

**Folio:** the instrument used by hotels to record guest or group charges.

**Mentor/Protege Relationships:** a relationship between an experienced professional and a novice.

**Off-Season:** some areas are more in demand during certain parts of the year. Off-season indicates the part of the year when demand is less.

**White Glove:** special treatment. In a hotel situation, a sleeping room specially prepared for a customer's inspection.



## REFERENCES AND SUGGESTED READINGS

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