

# Travel Arrangers Education Day 2017

## Advanced Meeting Planning @ MSU

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# Program Overview

1. Scope of Event
2. Budget
3. Venue Selection
4. Request for Proposal
5. Site Visit
6. Negotiation Tips
7. Contract / Terms
8. Hotel Room Blocks
9. Event Logistics
10. Billing / Payment
11. Conclusion

# Scope of Event

- Goal of event
- Who are the attendees? How many?
- Date/date range
- Meeting and function room needs
- Food and beverage services
- Overnight accommodations

# Best Practices



How do you gather this information when you are not the decision maker?



# Budget

## Revenue

- Registration fees
- Grant funds
- Partner organizations
- Department operating budget
- Sponsorships



# Budget

## Expenses

### – Indirect costs

- Overhead – staff salaries, office equipment

### – Fixed costs

- Charges incurred regardless of the number of participants – audio visual equipment, meeting room rental, equipment rental

### – Variable costs

- Charges that vary based on the number of participants – food and beverage, transportation, lodging, print materials, promotional gifts



# Budget

## Hidden costs

- Service fees
- Gratuity
- Audio visual equipment
- Resort fees
- Labor
- Taxes
  - Occupancy tax
  - Other local taxes



# Budget



How do you balance your event budgets?





# Venue Selection

## Considerations

- Event type and participant expectations
- Event location; local, urban, airport,
- Event location may determine process for selection
- [GLCVB meeting facility list](#)
- Use of MSU facilities and related benefits




# MSU Venues

- Alumni Memorial Chapel
- Broad Art Museum
- Cowles House
- Destination State; Kellogg Center, residence halls, Breslin Student Events Center, The MSU Union, The Huntington Club
- Henry Center
- Kellogg Biological Station, Kellogg Manor House
- Management Education Center – Troy
- Secchia Center – Grand Rapids
- University Club of MSU (agency account in EBS)
- Wharton Center for Performing Arts
- Tollgate Farm - Novi
- [See CVB Visitor's Guide for other facilities in the community](#)



# Request for Proposal

- Information about group, attendees and organization
  - Purpose of the event
  - Preferred dates
  - Number and type of hotel rooms
  - Number, size and usage of meeting rooms
  - Range of acceptable rates
  - Number and types of food and beverage events
  - Exhibits or other special events
  - Timeline; due date for proposal, who will review the proposals and when the decision will be made
  - Preferred method of response; email, phone, mail
  - Non-negotiable contract terms
- 

# Request for Proposal

## The process

- When to engage in an RFP process
  - Over \$10,000 in total spend
  - Gather 3 proposals
- Purchasing department is available to help
- Local hotel chain RFPs
  - [http://www.ctrl.msu.edu/cotravel/hotels\\_msulocal.aspx](http://www.ctrl.msu.edu/cotravel/hotels_msulocal.aspx)
    - Transient overnight rooms only,
    - Group rates are negotiated individually
- Major chain hotel contract – IHG

# Request for Proposal

- Send it direct to venues
- Utilize local Convention and Visitors Bureaus
  - Their services are FREE!
  - Distribute RFPs to multiple venues
  - Collect and compile responses
- Other outlets
  - Cvent Supplier Network
  - StarCite
  - Eventbrite



# Request for Proposal

- <http://www.conventionindustry.org/APEX/RequestsforProposals.aspx>



# Request for Proposals



How do you gather proposals and how do you evaluate what you receive?



# Site Visit

- <http://www.conventionindustry.org/APEX/AdditionalResources.aspx>
- Utilize the local convention and visitors bureau
- 1 complimentary overnight room is common
- Checklist
  - City – accessibility & environment
  - Overnight accommodations
  - Meeting space
  - Food and beverage services
  - Exhibit space
  - Offices and others services
  - Equipment





# Negotiation Tips

- Purchasing and the Travel Office can assist you and provide guidance
- Prepare ahead
- Prioritize negotiable items/terms
- Don't be afraid to ask for reasonable concessions
- The goal is to create a WIN-WIN situation
- Be forthcoming

# Negotiation Tips

## Considerations

- Arrival date/pattern
- Hotel room rate, especially if the guests are paying their own
- Selective products – MI agricultural products, brand specific requests (Coke vs. Pepsi)
- Food and beverage schedule, entrée selections
- Extended timeline for reviewing contract to accommodate your team and MSU Purchasing



# Negotiation Tips

## Common Concessions

- 1 complimentary hotel room for every 40 booked
- 30-day cutoff date for hotel room block
- Limited complimentary upgrades for VIP guests
- Complimentary meeting space for pre-conference staff meeting or complimentary hospitality space



# Negotiation Tips



How do you get the best deal for your events?



# Contract / Terms

- The offer
- The acceptance
- Authorized signatory
- Purchasing Department reviews and signs contracts:  
(MBP Section 270: <https://usd.msu.edu/mbp/mbp-270/index.html#signature>)
- The Purchasing staff have signature authority to sign contracts  
(<https://usd.msu.edu/common/documents/delegation-of-sig-auth.pdf>)
- Exception: MSU to MSU contracts



# Contract / Terms

- Liability/insurance
  - MSU can provide a certificate of insurance ([rmi.msu.edu](http://rmi.msu.edu))
  - MSU is self-insured and cannot name another entity as an additional insured



# Contract / Terms

- Indemnification
  - Mutual
  - MSU will not take responsibility for things that are out of our control, within the other party's control or result from the negligence or wrongful acts of others.

# Contract / Terms

- Attrition clause
  - Negotiate a percentage of room commitment that is not penalized if you do not meet your goal.
  - Can be tied to total guaranteed revenue, meeting room costs and/or you have to pay for rooms that do not get re-sold by the hotel.
- Hotel room block terms
  - Rooming list or individual attendee reservations
  - Can the room block be increased?





# Contract / Terms

- Dispute Resolution
  - MSU will not agree to binding arbitration as a means of dispute resolution
- Governing Law
  - Our preference is to have it be Michigan



# Contract / Terms

- Confidentiality
  - MSU is subject to FOIA (Freedom of Information Law) so all of our documents are public record and therefore we cannot agree to keep the contract or any portion thereof confidential.



# Contract / Terms

- Cancellation schedule

<u>Notice Received Prior to Arrival</u>	<u>Assessment</u>
91 days or more	No Charge
61 day to 90 days	50% of total contracted cost
31 days to 60 days	75% of total contracted cost
30 days or less	90% of total contracted cost or latest guarantee numbers

- Guarantee policy

Quantities of food and beverages are prepared based on the guaranteed number of guests, plus 5% above the guaranteed number to ensure that all guests at the event enjoy an attractive selection of food.

We require that your assigned event coordinator be advised of your exact number of guests attending each function by 5:00 PM, two business days before each event. If for any reason the guarantee is not received by that time, the most recent projected figure will be considered as your final guarantee number.

If the number of guests attending an event exceeds the guarantee by more than 5%, extra guests will be billed at 150% of the per-person food price. In addition, we reserve the right to substitute other available food and services if necessary when the guaranteed number of guests is exceeded, or when the guaranteed number increases within 72 hours of the event.



# Contract / Terms



What are your deal breakers?



# Hotel Room Blocks

- Reservation method
  - Rooming list vs. Individual
    - Rooming list: include guest name, arrival date, departure date and payment method
    - Individual: guests make their own reservations, you may still have some liability
- Payment method
  - Individual payment: guests guarantee and pay their own overnight room charges
  - Direct bill: Room and tax get billed to master account, specific to hotel whether this master account will pay for incidental charges too
- Taxes
  - Occupancy tax applies, even if you're sales tax exempt
- Cutoff/release date
  - Typically 30 days prior to arrival
  - Common request: apply group discount for 2 days before arrival and after departure
- Overflow room blocks



# Event Logistics

## Planning Meetings & Timelines

- Pre Conference
- Onsite
- Post Conference



[Greater Lansing CVB Meeting Planner Checklist](#)



# Event Logistics

## Event Specifications Guide (ESG)

- Planner Contact Information
- Meeting Information
- Room Set up
- AV Requirements
- Food & Beverage Requirements



# Event Logistics

## ESG translation

### Planner - Event Manager -Property Staff

- Banquet Event Order
- Function Sheet
- Group Specifications Guide
- Group Resume





# Event Logistics

- Special needs & accessibility
  - Dietary requests
  - Persons with disabilities
  - Translation services
- Transportation
- Poster Easels
- Catering Services



# Event Logistics

- [Greater Lansing CVB Services List](#)
- [Greater Lansing Event Suppliers](#)
- Shipping materials
  - Stores services for item shipped to campus,  
<http://usd.msu.edu/logistics/services/event-material-management.html>



# Event Logistics



What are your tips for planning a flawless event?



# Billing / Payment

- Request a preliminary invoice prior to your event
- Review the invoice immediately following your event
- Do you have Federal or State per diem requirements?
- Alcohol charges
  - Discretionary accounts only
  - Charges must be separate
- Payment methods
  - EBS processes; reviewer, approver, account number/program number, ad hoc reviewers
  - Invoice and disbursement voucher
  - Meeting planner credit card



Thank you!



Questions?



# Contact Information

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