EUROPEAN PERSONAL ASSISTANT LEVEL 4

WA7: Business Travel, Diary Systems, Meeting organization and event management

4.5 Design, plan, organise meetings and other events

LO106: Demonstrate ability to carry out successfully the role of an event organiser in planning a meeting, conference or another event that meets the defined objectives, participants' expectations and stays within the given budget.

LO107: Demonstrate ability to carry out the necessary preparation before the event ensuring participant requirements, health and safety requirements and legal requirements are addressed and met.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Module Details

Work Area Code:	7
Work area title:	Business Travel, Diary Systems, Meeting organization and event management
Unit Code:	4.5
Unit Title:	Design, plan, organise meetings and other events
Learning Outcomes Ids:	LO106, LO107
Learning Outcomes titles:	- Demonstrate ability to carry out successfully the role of an event organiser in planning a meeting, conference or another event that meets the defined objectives, participants' expectations and stays within the given budget. (LO106) - Demonstrate ability to carry out the necessary preparation before the event ensuring participant requirements, health and safety requirements and legal requirements are addressed and met. (LO107)
Recommended Duration:	4 hours
Trainer:	

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Events

Apart from organizing regular company meetings, you may occasionaly be asked to organize more complex events such as:

- Business Conference (convention)
- Trade show presentation/industrial fair
- Christmas /other party (for clients or employees)
- Teambuilding activity

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Business conference

- Conference is a gathering of a larger number of people that share the same business field or topic
- The purpose is usually to exchange ideas and latest trends, networking, trade or presenting scientific results (academic conferences)
- They include speakers presentations, workshops, Q&A sessions, formal dinners and more informal rauts, evening leisure activities, etc.
- Based on a number of attendees they take place in large business hotels or convention centres

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Business conference

- Typically they get organized by **professional event or conference organization companies** that provide full service management for conferences including conference design, program development, registration, site and venue selection and booking, audiovisuals, IT support, logistics, leisure management, marketing, printing and web services, sourcing speakers, funding, sponsorship and exhibitor sales, financial management and budget control.

EUROPEAN PERSONAL ASSISTANT LEVEL 4

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Trade show / Industrial fair

- A **trade show** is an exhibition organized so that companies in a specific industry can showcase and demonstrate their latest products and services, meet with industry partners and customers, study activities of rivals, and examine recent market trends and opportunities.
- Oranization responsibility is usually on marketing or business department of a company

EUROPEAN PERSONAL ASSISTANT LEVEL 4

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Trade show / Industrial fair

EUROPEAN PERSONAL ASSISTANT LEVEL 4

- Companies often need to spend **large amount of money** for space rental, booth design and construction of trade show displays, telecommunications and networking, travel, accommodations, and promotional literature and items to give to attendees.
- Exhibitors attending the event are required to use an **exhibitor manual** to order their required services and complete any necessary paperwork such as health and safety declarations.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Client appreciation event / party

- More relaxed event based on networking and building relationships with clients
- Usually includes catering/raut, is connected to some music entertainment
- May or may not have a specific theme

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Teambuilding activity /party for employees

EUROPEAN PERSONAL ASSISTANT LEVEL 4

- Semiformal/ Informal event
- Goal is to strenghten teamwork and get to know each other better
- Sometimes may be organized to solve speciffic team issues
- Duration may vary from one evening to several days
  - Parties
  - Sports events and competitions
  - Teambuilding activities and games

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Meeting /Event venue

Basic venue Requirements:

- Based on the purpose of the meeting/Event and the number of attendees.
- Is the venue is in good reach?
- Check with the venue to see if they have all the facilities needed for the meeting.
- Inform the chair and the attendees if necessary and get ideas if needed about their expectations for the venue in order to avoid any problems or failures.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Meeting /Event venue selection criteria

Suitability:

Check to see if the venue is big enough to accommodate all the attendees of the meeting.

Location: Make sure that the venue is in a location accessible to all the attendees

Availability: Check to see if the venue is free on the date requested to avoid disappointment at the last minute. It can create further problems not knowing the venue is not available after all arrangements have been made and all attendees have arrived.

EUROPEAN PERSONAL ASSISTANT LEVEL 4

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Meeting /Event venue selection criteria

Size:

Check to see if the venue can accommodate all the attendees and the resources that they will need, and if help is available to use resources needed.

Facilities:

Check the venue to see if you can hold the event there without any trouble in using the resources.

Cost:

Also check to see if the venue fits into the budget and if it is cost-effective.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Meeting resources and equipment

- ✓ *Writing material*
- ✓ *Hotel rooms and meeting and conference rooms*
- ✓ *Conferencing equipment – audio and visual*
- ✓ *White Board, Flipcharts*
- ✓ *Microphones*
- ✓ *Translating equipment*
- ✓ *Hi-speed internet connection*
- ✓ *Speakers desk*

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Meeting resources and equipment

- ✓ *Catering services*
- ✓ *Parking places*
- ✓ *Leisure services (swimming pool, golf-course, ball-room,wellness,...*

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Effective Events

Effective events have a set **objective**, happen with proper **planning** and should have a **purpose** and **outcome**.

When the event/meeting was effective, it has reached its goal and the cost did not exceed the budget.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Effective events

BEST PRACTICE tips

1. Set realistic objectives, make it achievable
2. Get organizational buy-in and ownership of the event
3. Manage the time commitment of the staff
4. Choose realistic logistics
5. Set manageable timelines

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Effective events

6. Pick the right time for the event
7. Anticipate and plan for repetition
8. Customize the event to meet the needs, requirements and wants of the participants
9. Define roles and responisiblities clearly
10. Get feedback and measure success

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Share your experience

- Have you been asked to organise a similar event?
- How did it go?
- What were your responsibilities?

Group discussion

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Event organizer

A ***Event Organizer*** is the person who **schedules** an event, and usually the person that **runs** it and **reports** it. Organizers make sure their events run **smoothly**, and if there are any problems, they **resolve** them. They are **responsible** for the event from start to finish.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Event organizer

During the event planning and execution he is responsible for:

- all delegate provision and needs,
- meeting relevant health, safety and security requirements
- observing legal and organisational requirements for contracts
- co-ordinating resources and sub-contractors and the use of event materials
- liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out
- recommending and assisting the speakers and participants for respolving any problems during the event (e.g. complaints, VIPs, security, translation)
- supervising the work of all staff members and subcontractors involved in order to make sure that all requirements are met and the roles are understood

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Event organizer

After the event he is responsible for:

- clearing and vacating the venue
- organising follow up papers and activities
- reconciling accounts to budget
- evaluating an event and the methods that can be used to do this

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

EUROPEAN PERSONAL ASSISTANT LEVEL 4

Methodological tool

EUPA_LO_106_M_001

Annual client party

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

The following is a generic Event Checklist that will help you get started in identifying all of the details you'll need to consider as well as an indication of the timelines involved with your event planning process.

The checklist has to be adapted for every event you are organizing or to to your company needs.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

High Level Planning: 4-6 Months Ahead of Event

- Establish event goals and objectives
- Select date
- Identify venue and negotiate details
- Develop Event Master Plan
- Get cost estimates and create a budget
- Recruit event committee
- Create and launch publicity plan & brand your event *(*Identify and confirm speakers/presenters/entertainers
- Identify and contact sponsors/partners

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

- Venue/logistics planning:
  - Investigate need for any special permits, licenses, insurance, etc.
  - Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.
  - Review security needs/plan for the event with venue manager

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

- Publicity:
  - Develop draft program
  - Develop publicity pieces - *newsletter articles, ads, radio spots, …*
  - Request logos from corporate sponsors for online and printed materials
  - Develop and produce invitations, programs, posters, tickets, etc.
  - Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

- Publicity:
  - Create event page on your website
  - Enable/create email event notifications
  - Create a Facebook event page
  - Develop a promo video and post on YouTube and your Facebook page
  - Register your event on a variety of online event calendars
  - Create some buzz on your blog or member forums
  - Determine VIPs and create invitation & tracking document (e.g., spreadsheet)

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

2 months prior to event

- Send reminders to contact list re registration/participation
- Presenters/Speakers:
  - Confirm travel/accommodation details
  - Request copy of speeches and/or presentations
- Follow up to confirm sponsorships and underwriting
- Publicity:
  - Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.
  - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

1 week ahead

- Have the committee meet and confirm all details against Master Plan
- Finalize event script
- Brief any/all hosts, greeters, volunteers about their event duties and timelines
- Final seating plan, place cards, etc.
- Provide final registration numbers to caterer
- Make print and online copies of any speeches, videos, etc.
- Final registration check, name badges & registration list
- Determine photo op and interview opportunities with any presenters, VIPs etc. and confirm details with interviewee and media

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

1 day ahead

- Confirm media attending
- Ensure all signage is in place
- Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
- Ensure all promo items, gifts, plaques, trophies, etc. are on-site

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

Event day

- Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- Check-in with each Committee Chair to ensure their team is on track

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Detailed Checklists

Immediately following event

- Financial status: gather all receipts, documentation, final registration data, etc. and update budget
- Send thank-you's and acknowledgement letters

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Budget

Budget is a an estimate of costs, revenues, and resources over a specified period, reflecting a reading of future financial conditions and goals. Budget serves also as:

- a plan of action for achieving quantified objectives,
- standard for measuring performance,
- device for coping with foreseeable adverse situations

http://www.businessdictionary.com/definition/budget.html

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Developing a Budget

There are various processes that one needs to know and understand before developing and agreeing a budget:

- how to **use estimations** when developing a draft budget
- how to **identify priorities** that are needed when preparing a budget and the purpose and benefits if identifying these priorities.
- how to **identify financial resources** needed for preparing a budget.
- the purpose and benefits of **evaluating and justifying estimated costs and income**
- the **procedures for negotiating** superseded budgets
- Have **skills** needed for agreeing budgets.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Developing a Budget

1, Where you don't have actual figures, when **estimating expenses**, estimate the highest possible

2, When using **estimations** for developing a draft budget, prepare a list of all the resources that you will need to develop the budget. **Gather all the resources** and then finally put them together to develop the budget.

3, You need to **create a list of all the expenses**. Categorise the expenses separately and draw a list.

4, Prepare an estimated expense list and use previous expenses for reference.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Developing a Budget

5, Where you don’t have actual figures, when **estimating expenses**, estimate the highest possible

6, While you have a list of expenses, **develop a prioritised list** taking into consideration what expenses contribute to achieve a specific goal.

7, The more **details** you add, the more accurate your budget will be. Ignoring one small item can be the difference between being under or over budget.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Developing a Budget

8, Keep in mind that sometimes the cost of one element is **dependent** on the cost of another.

9, You **don't always have to go with the cheapest option** if you have the money for it. Adding a little extra money here and there can be the difference between a mediocre event and an incredible experience.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Event documentation includes

- Event objectives
- Project plan
- Budget
- Program schedule
- Site plan/venue details
- Contracts with suppliers
- Event promotion and marketing
- Participants lists
- Invitations
- Presentations/documents

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Solving complaints – step by step

1. Listen carefully to what the customer has to say, and let them finish.
2. Ask questions in a caring and concerned manner.
3. The more information you can get from the customer, the better you will understand his or her perspective.
4. Apologize without blaming.
5. Don't blame another person or department. Just say, "I'm sorry about that.”
6. Ask "What would be an acceptable solution to you?„

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Solving complaints – step by step

7. Become a partner with the customer in solving the problem.
8. Solve the problem, or find someone who can solve it— quickly!
9. Research indicates that customers prefer the person they are speaking with to instantly solve their problem. When complaints are moved up the chain of command, they add to the customer's frustration.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Collecting requirements from participants

The easiest way is to collect information from all your attendees when they register for the event, prefferably online or on-site.

Information can be optional or required, and you can even create your own custom questions for attendees to answer.

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Collecting requirements from participants

Collect:

- Personal data
- Room reservation requirements
- Food/dietary requirements
- Translation services
- Transportation
- Activities to attend
- Special requirements

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

EUROPEAN PERSONAL ASSISTANT LEVEL 4

Methodological tool

EUPA_LO_107_M_001

Collecting requirements

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Legal requirements for contracts

The purpose of the event planning contract is to protect both parties involved.

Contents:

1,Very clear and detailed specification of the Event Planning Services That Will Be Provided and that will not

2, Payment terms and schedule

3, Terms of event cancellation

4, Termination clause (force majeure)

5, Indemnification Clause

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Health and safety

As an event organizer, you are responsible for the health and safety of:

1. People who work for you
2. Your attendees
3. Contractors

There's a three step process you should take to tackle health and safety at your event: **Plan-Monitor-Review.**

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Health and safety

PLAN

- decide who is going to help you with hea and safety duties
- ensure that the people who are handling particular aspects of your events health a safety are aware of their responsibilities a can be trusted to handle them competen
- consider creating a safety plan
- develop an emergency plan

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Health and safety

MONITOR

- ou've identified all your risk and put in appropriate steps to minimise their impact and ensure that everyone's going to have a great time.
- are your staff setting up in line with agreed health and safety protocols?
- are contractors showing that level of care and competence expected

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Health and safety

REVIEW

- it's important to review and reflect on your event and determines precisely what happened in practice and whether or not there are improvements you can make next time.
- near-misses are important – although it may have seemed like a remote possibility in the planning stage, did the reality of your event pose an un-thought-of-risk?

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

- Review Question 1
  - What are the main roeles and responsibilities of an event organizer?
- Review Question 2
  - Describe step by step approach when developing an event budget
- Review Question 3
  - What should be included in the contract for event planning?

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

- When selecting a best event venue, keep in mind the following
  - Suitability
  - Location
  - Availability
  - Size
  - Cost
  - Facilities
- Event health and safety approach
  - Plan-Monitor-Review

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

EUROPEAN PERSONAL ASSISTANT LEVEL 4

Well Done!

You have completed this unit

Co-funded by the Erasmus+ Programme of the European Union

This project has been funded with support from the European Union. This [project] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.