

**Mid-Atlantic Chapter/MLA
Annual Meeting Task Force
Supplemental Report about Meeting Planners
February 2003**

Current Task Force Members:

Pat Hammond, Chair
Donna Flake
Julia Shaw-Kokot
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At its Fall meeting on September 10, 2002, the Mid-Atlantic Chapter Board requested that the Task Force amend their report by investigating the use of meeting planners. Janice Kelly, MAC Chair, asked the Task Force to "investigate the costs, benefits and liabilities of using a meeting/program planner" and submit a report to the Board at its 2003 Winter meeting.

Janice Kelly contacted other MLA Chapter Chairs via email. The responses indicated that some chapters have had good results with using a professional planner:

1. ***Midcontinental Chapter*** - has a meeting planner. It is valuable and they will continue using one to help plan/execute annual meetings. The benefits have been:
 - Establishing a credit history for the chapter that will carry from one location to another
 - Providing experience assistance with the review of hotel contracts
 - Providing continuity from one meeting to the next
 - Developing of real expertise that can be shared with each meeting planning group
 - Providing practical advice on meeting logistics
2. ***Medical Library Group of Southern California and Arizona*** - used a meeting planner for a joint meeting in San Francisco. Their advice was:
 - Help negotiating the hotel contract and handling the myriad details regarding food, exhibits, and entertainment.
 - Checking with University Events Planning Departments for free help
 - Successful Events (<http://www.successfulevents.org/>) sells software for meeting planning - planning schedules, laying out rooms, making timelines, assigning tasks and importing membership lists for registration.
3. ***North Atlantic Health Sciences Libraries Chapter*** - has been using the same meeting planner for about 10 years. The planner assists the incoming conference chair locate a hotel and negotiate a contract. The benefits have been:
 - Having the expertise from the outset to locate and select a site
 - Having a short list of 2-3 places in the price range
 - Letting the planner negotiate the room rates and final hotel contract
 - Saving time without it costing the organization anything (her fee is paid by the hotel)
4. ***Southern Chapter*** - used a meeting planner for 1999 annual meeting and plans to use one for an upcoming meeting. Advice gathered from their 1999 meeting:
 - Get the names of local planners from the Chamber of Commerce
 - Use a local planner and pick someone who is interested in getting your business.
 - Choose the hotel yourself, but let the meeting planner negotiate the contract for you.
 - For the work the meeting planner did, the price was reasonable.

- Negotiate a contract with the planner.
 - Give the planner a budget.
 - Ask the planner(s) for a proposal.
- The price is based on how much you want the planner to do:
 - Negotiate hotel contract
 - Plan side trips
 - Handle banquet/welcome reception details
 - Negotiate reduces fares with airlines
 - Handle registration - keep lists of attendance for special events, meals, etc.
 - Work with vendors/solicit donations
- Reserve the right for you to pick out the food
RECOMMENDATION: Put EVERYTHING in writing, so there are no misunderstandings

Observation: Other chapters that have used meeting planners have been satisfied with the service and expect to use a planner again.

Medical Library Association - Ray Naegele, Headquarters staff, sent the following advice:

- A good meeting planner saves time and money and relieves the leaders of burdensome details. The trick is to find a good one. Referrals and professional Associations are a good place to look.
- Please note, if a chapter has many willing volunteers and its culture leans toward members handling details - an outside planner may not be necessary or desirable.
- The steps to hiring a planner are similar to seeking a contractor to work on your house:
 - Define scope of work (RFPs are good)
 - Ensure prospective planners have experience in requested areas for similar type groups
 - Get at least 3 bids
 - Check references
 - Set a budget (be sure chapter can afford the fee)
 - Planner needs to be an independent contractor (not an employee of the chapter)
 - Write a contract
 - Define areas of responsibility. For example, the program committee plans the program but the planner handles the logistics. Ask the planner for a schedule and guide.

The first meeting will be a learning experience. Allow time to build a good working relationship and trust. A 3-year contract seems good with a cancellation clause.

If your planner leaves, be sure to get the meeting specification book that has the details of your meeting so the new planner won't have to start from scratch.

Provide and expect good communication, access to information and support from chapter leaders.

Bottom Line: The planner should measurably improve the meeting experience for attendees and leaders.

2002 Mid-Atlantic Chapter Meeting

MAC used a meeting planner for the most recent meeting at the Wyndham in D.C. Local Arrangements Co-Chair Beth Layton felt that the experience was beneficial both to MAC and to her personally. She and Co-Chair Jane Blumenthal had done some preliminary work to look for possible hotels several years ahead of the meeting but felt it was "like spinning our wheels." Another MAC member suggested the name of a meeting planner and he worked out very well. His fee was paid directly by the hotel based on the negotiated room rate and reservations, i.e., he got a percentage for every room that was booked. After discussing parameters and requirements for the MAC meeting, he contacted the hotels and sent the Chairs a list of potential sites and costs. After they jointly narrowed the field and visited 4 sites, the

planner helped negotiate the contract with the Wyndham. Beth was very pleased with this approach and felt that the planner gave them specific, legitimate options and definitely saved time for the LAC Chairs. She would recommend using a planner in the future and had a couple of other suggestions:

1. Have an agreement in writing on what the planner will do and when he will do it - for instance, as the meeting time grows nearer, do you want the planner on board to run interference at the hotel if things get sticky?
2. Consider holding the meeting in the same place several years in a row to take advantage of a long-term contract with a hotel.
3. Think about using a particular chain of hotels if moving the meeting from place to place in order to get extra hotel benefits.

OBSERVATION: Groups that have used a meeting planner had a positive experience and benefited from engaging an expert. Fees are determined by the services required by the group.

Suggested contacts:

Meetings Professional International
www.mpi-cc.org
Raleigh, NC Chapter
(They do not have suggested fees)

Donna Wikstrand (NAHSL Chapter Planner)
Conference Hotels of New England
51 Harborview Rd.
Hull MA 02045
(781) 925-4000
(781) 925-2474 (fax)
dwikstrand@mediaone.net

Donna Wikstrand recommends:

Wendy Bassett
14821 Beckenham Dr.
Charlotte, NC
(704) 545-2288
wkbassett@msn.com

Danny Treece
President and CEO of American Meetings
5200 Wilkenson Blvd.
Charlotte, NC
(704) 399-8000
dtame-cltnc@worldnet.att.net

2002 MAC Annual Meeting Planner Contact:

Melissa Larson
Business Development Manager

Meeting Solutions
2201 Wisconsin Avenue, NW
Suite C110
Washington, DC 20007
(202) 289-2220 ext. 100
(202) 338-2140 (fax)

Medical Library Association uses:

Paul Graller
Hall Erickson, Inc.

Shortcoming: Task Force members were unable to secure fee estimates.

RECOMMENDATIONS:

1. MAC Local Arrangement Committees should routinely engage a meeting planner to help with hotel contract negotiations. This is no cost to MAC and having an expert to do the negotiating saves time and headaches.
2. MAC should work with a planner located in the geographical area of the meeting.
3. When the meeting is held in a location where few MAC members reside, fee for service arrangements could be made with the meeting planner for additional services, like registration or vendor/exhibit details.