



GENERAL SCOPE OF SERVICES DETAIL SPECIAL EVENTS & MEETING PLANNING

Event Management

- Develop and send RFP's for hotel, audio visual supplier, lighting company, etc.;
- Direct liaison with the meeting/event Committee member(s), as appropriate, for direction and input;
- Attendance at organizing and sub-committee meetings, as needed;
- Direct contact and responsibilities related to all contracted venue(s) for event program;
- Select and coordinate all vendors. Ensure provision of goods and services for event via written, specific confirmations, including all details for delivery, dress code, etc. as per PFI;
- Provide a dedicated team of event professionals to service account throughout planning process;
- Develop on-line registration site;
- Provide assistance with registration packets and personnel, badges and equipment;
- Book and manage hotel room blocks and travel per contract;
- Coordinate all transportation needs;
- Research, select & contract speakers; handle all scripting, presentations, as needed & all associated event logistics, travel arrangements and check-in requirements;
- Hire & contract translators; include all travel arrangements;
- Hire security and handle related on site requirements, etc.;
- Develop timelines for all event elements
- Produce CAD drawings to predetermine room setup(s) or tent layout;
- Execute event design and install using CAD layouts and team Production Schedule;
- Monitor budget and interface with client ongoing;
- Handle press arrangements and media communication package;
- Provide a team of experienced on-site event managers to orchestrate all details.

Creative

- Develop creative strategies to engage guests and assist client in achieving goals in line with corporate or not- for profit image and budget;
- Event design and logistics to result in Signature Environment;
- Integrate food and beverage, service styles, entertainment and venue logistics into overall environment, enhancing the total experience for participants;
- Produce Menu cards and presentation style;
- Develop sponsorship and/or benefits packages, sponsor kit;
- Handle graphics and collateral pieces.



Financial

- Provide comprehensive budget development covering all event elements and break-even analysis, especially when needed to determine appropriate ticket fees or conference costs;
- Provide recommendations for registration fee structures, payment methods, terms & conditions of cancellation, etc., including break-even model analysis;
- Negotiate for best value with all suppliers on client's behalf;
- Provide on-going budget monitoring/reporting throughout planning process;
- Review all charges from hotel bills for accuracy;
- Provide accounting for and handle vendor payments as part of turnkey meeting or event coordination/operation.

Marketing

- Define and decide meeting name/theme in concert with client;
- Attend Marketing meetings;
- Help develop strategies including collateral pieces and associated PR; may include handling printing, shipping, distribution/ storage on site;
- Handle conference manifests; maintain and update;
- Design or provide appropriate invitation to client-provided list; address and mail if requested; handle RSVP's;
- Recommend use of Logo/Artwork for the meeting/event theme in all promotional materials;
- Design and manage e-vites, oversee responses; posting of information on website pertinent to event or meeting;
- Develop and manage website or on-line registration site with event information;
- Develop welcome information for Attendees; can be made available as print piece as well as on-line (as part of on-line registration) prior to Conference, Meeting or Event;
- Implement branding including use of corporate Style Guides, graphics and marketing communications stream;
- Define Sponsor (Kit) levels and corresponding benefits with client input; design and produce for presentation to potential sponsors;
- Sell Sponsorship
- Interact with any existing marketing or ad agency to perform as a team servicing the same client to achieve the same goals;
- Suggest, order and distribute any promotional imprinted items for client.

Production

- Provide overall comprehensive planning, coordination, logistics development, event management and production services, including client/host liaison communications & meetings;
- Conduct site inspection(s) of all venues booked for meeting/event. Build relationship(s) with point-of-contact person at each venue;
- Handle contractual negotiation(s), signing of contract(s) and liaison with selected event/meeting venue after completion of site inspection(s);
- Finalize and oversee all catering selections throughout the meeting/event; inform client of any changes and resulting financial impact;
- Design and produce CAD floor plan layouts for events and/or trade show, as required;



Production (continued)

- Propose and book appropriate entertainment selections; handle rider(s) as necessary;
- Provide speakers with pertinent meeting/event logistics information and have personnel to assist on site, if needed;
- Secure event photographer and/or videographer (for client promotional uses) as appropriate;
- Provide experienced personnel to perform on site press liaison, if required;
- Define need for, design and produce, any necessary signage;
- Determine and book AV needed for meeting/event event;
- Design and produce stage set/ lighting;
- Excel Spreadsheets to detail all Food & Beverage pricing and choices to easily and effectively meet budget goals;
- Coordinate gifting and/or amenities fulfillment;
- Provide client with copy of PFI's event insurance coverage of general liability and professional indemnity.

Client May Provide

- Historical conference information: past sponsorship details, any previous trade show information, overview, logistics requests and defined goals for the upcoming meeting/event;
- Any essential information related to elements needed for the upcoming program, especially if already contracted;
- Budget information;
- List of all committee members and other VIP personnel who may be assisting as well as committee decision maker(s) (point of contact);
- Contact information on pre-selected speakers, including headshot photos and bios for use in collateral pieces, if available;
- Attendee list from prior meeting/event, if appropriate;
- Meeting program information and approved Agenda, if available, to include selected speakers and topics for sessions as well as break-out programs as information base;
- Provide mailing lists, along with any additional addresses, to assist with conference mailing/marketing;
- Approve Design for conference/meeting collateral pieces, if available;
- Optional hands-on staff during event; definitely staff for registration as Welcome Staff for dinner event.

Post Production

- Debrief meeting schedule, plans;
- Accounts reconciliation;
- Set goals for next year's conference/meeting, including location, venue, etc.