



Wedding and Event Planner

Instruction Pack 1

Lessons 1-6

Explore the possibilities

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Wedding and Event Planner

Instruction Pack 1

**Lesson 1—Welcome to the World of
Wedding and
Event Planning**

**Lesson 2—Today's Wedding and
Event Planner**

**Lesson 3—Kick Off Your Event
Planning**

**Lesson 4—Manage Your Client's
Resources**

**Lesson 5—Event Details—Corporate
and Private Events**

**Lesson 6—Speakers, Sponsors and
Teamwork**

Wedding and Event Planner

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Welcome to the World of Wedding and Event Planning

1

Step 1 Learning Objectives for Lesson 1

- When you have completed the instruction in this lesson, you will be trained to do the following:
 - ❖ Describe the responsibilities of Wedding and Event Planners.
 - ❖ Explain the demand for Wedding and Event Planners.
 - ❖ Estimate the earnings potential for Wedding and Event Planners.
 - ❖ Make a good first impression with clients.

Step 2 Lesson Preview

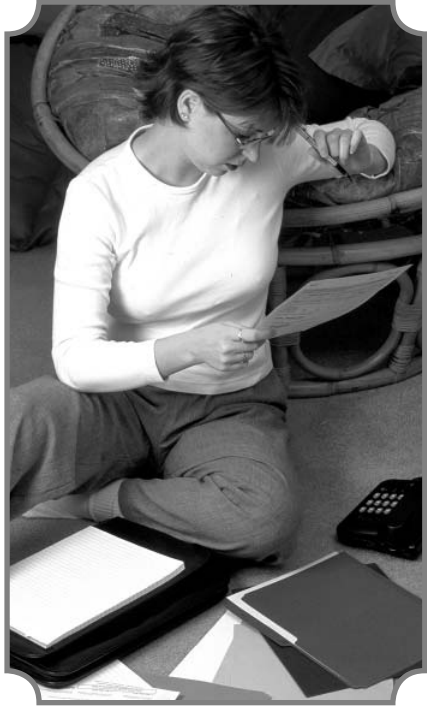
- Welcome to the U.S. Career Institute Wedding and Event Planner Course! We are very pleased to have you as a student. You probably already have an interest in and maybe even some experience planning weddings, parties or other special events. Maybe it has been your dream to make a career out of doing something you truly love. By enrolling in this course, you have taken an important step toward being a professional, knowledgeable event planner.

Wedding and event planning is a creative, exciting job. As a Wedding and Event Planner, you will help make other people's visions of events a reality. Your organization, resources and creativity allow you to provide a valuable service to brides, party hosts or corporate events. The need for Wedding and Event Planners has grown steadily in recent years and continues to increase. In fact, employment of event planners is expected to grow faster than the average for all occupations (20%) through 2016 according to the Bureau of Labor and Statistics. This course will give you the skills you need to start your career as a Wedding or Event Planner. And at U.S. Career Institute, we will continue to help you after you graduate. We offer graduate assistance to all students who complete our courses. The assistance includes job counseling and job search assistance.



Congratulations on taking the first step toward your new career in wedding and event planning!

We know you are ready to learn new skills and we are ready to teach you. From the very first page, until you have completed the course and are working in the field, U.S. Career Institute is dedicated to your success.



Your course offers step-by-step instruction so you build your knowledge in event planning.

This course is divided into lessons. Each lesson contains skills that you will master on your way to graduation. The lessons are easy to follow. They offer step-by-step instruction to make learning easier, even fun! As you go through the first few lessons, you'll notice that they share a basic order, which is always the same. You will always have your Learning Objectives and a Lesson Preview first. From there, you will read through new material and then take a Practice Exercise—a self-graded review. This combination of new material followed by review may be repeated two or more times in a lesson.

After you finish all the new material in a lesson, you will take a graded quiz. This quiz is designed to highlight what's important in the course. Nothing in the course, including the quiz, is designed to trick you. You will remember many of the items on the quiz without looking back at the lesson. But if you don't remember or aren't sure of an answer, you can find the information in your lesson. All of our quizzes are open book! We want you to find the right answer rather than memorizing everything.

If you have any questions about any part of the course, feel free to call an instructor. We are here to make your trip through this course enjoyable, challenging and rewarding. Now, remember how we talked about the step-by-step nature of this course? Well, here comes Step 3.

Step 3 Today's Wedding and Event Planner

- ❑ Wedding and Event Planners offer a valuable professional service. By planning and coordinating weddings and other special events, planners allow bridal couples, party hosts and business people the freedom to enjoy their important day. Have you ever heard the phrase “Don't forget to enjoy your own party”? Wedding and Event Planners make it possible for their clients to do just that. A planner may be involved in different stages of planning a wedding or event. She may take on different roles for different clients, something you'll learn more about in the next two lessons. The important thing to remember now is that as a Wedding and Event Planner as with any service industry, your job is to make people happy!

Who's Behind the Scenes?

Have you ever been to a special wedding or a great party where everything looked and tasted wonderful, and everyone had an excellent time? Did you wonder how it all came together? If you have ever planned a successful party in your home, or maybe even your own or a relative's wedding, you know that successful events don't happen by chance. There are always people behind the scenes, sometimes one special person, making it all happen.

A Wedding and Event Planner is this person. She is responsible for making sure weddings and events run smoothly. She listens to what the bride or host wants, forms a mental picture of the whole wedding or event from start to finish and makes sure all of the details are taken care of. Successful planners are creative and organized, and they are good with people. They are able to visualize best- and worst-case scenarios, and to coordinate events so they seem effortless.

If you're wondering how anyone can possibly perform such magic tricks, you'll soon find out. A Wedding and Event Planner's work may look like magic to satisfied clients, but the job of Wedding and Event Planning involves simple, practical skills—skills you will master as you move through this course.

What Wedding Planners Do

Many women dream about their wedding day from the time they're young girls. The wedding day may be one of the most important days of a couple's life; the wedding marks the beginning their life together. The period before the wedding can be an emotional time for the bride-to-be, with increased family tensions and couple tensions. Emotional issues aside, a successful wedding is a big production. Planning a successful wedding takes attention. Even a simple wedding requires careful consideration of the many details from invitations to centerpieces to the "getaway" car. Also, in today's changing society, and with more and more weddings incorporating diverse heritages and traditions, there is new etiquette to consider. Add to all of this the idea that you're supposed to have fun on your wedding day and it's no wonder so many brides feel overwhelmed.

Professional Wedding Planners relieve the bride of the stress of many of these considerations so that she can enjoy the day she's been dreaming of all her life. Wedding Planners offer a range of services, from simply giving an excited bride initial advice to coordinating the couple's entire wedding. Whatever other services you provide as a Wedding Planner, you make the bride's life easier so her wedding-day dreams are fulfilled.

What Event Planners Do

Like Wedding Planners, Event Planners take care of the planning of special occasions so that their clients, the hosts, don't have to worry on the day of the event. Whether it's a once-in-a-lifetime anniversary party, a company picnic, a sidewalk arts and crafts fair, a fund-raising benefit for a local charity or an international convention for a large corporation, a special event requires special planning. Though most clients who want to host a special event are not as nervous as brides, they do have a vision of their event and want it to be a success. They want to be able to enjoy themselves when the event takes place, confident that goals are being met. Like the Wedding Planner, the Event Planner understands the client's vision and works to make it a reality.



Wedding and Event Planners work behind the scenes making sure events are successful.

Planning a successful event takes time that hosts can't spare. Like a Wedding Planner, an Event Planner relieves her client of stress, acting as a diplomat, organizer and problem-solver and working with her client's resources. Event Planners take care of the details for their clients while keeping the big picture of the event in mind. They can offer creative ideas for theme parties, experience in getting supplies for the event and valuable organizational skills. Like Wedding Planners, the Event Planner's most important responsibility is to make the client happy!

In addition to freeing up the client's time, the Event Planners use knowledge and ability to determine the direction of the event by talking with the client—even if the client doesn't have a clear vision of the event. If the client cannot visualize the event, the Planner can pick up on the client's clues to help plan the event. Planners' resources and ideas can complete a vision so the clients can be satisfied by their event.

Step 4 The Need for Wedding and Event Planners

- ❑ Luckily for Wedding Planners, there will always be people wanting to get married. These days, many brides are realizing what a difference a wedding planner can make to their weddings. The days are gone when a bride's mother planned her wedding from start to finish. Today's bride is older and may live in a different part of the country from her parents. She probably has a career and may not have time to chase down caterers, musicians or florists, much less plan every detail of her special day. In fact, the bride may not be aware of all that's involved in planning a wedding. Though the demand for Wedding Planners varies in different regions of the country and is usually higher near urban areas, more and more brides throughout the country are hiring planners. Today's bride knows how much time, stress and money a planner can save.

Demand

The demand for Event Planners grows with the economy. When times are good, most people like to celebrate, and in the business and nonprofit world, there will always be a need for special events. Companies that have meetings, conferences and conventions need someone to plan these events. And local businesses are always looking for creative ways to draw in customers, such as sidewalk fairs or festivals. Nonprofit organizations and charities have a constant need for fund raising events. Event Planners have the time and resources their clients don't to plan successful events. As more and more organizations realize what Event Planners can do for them, the profession continues to grow.

You may choose to focus your career on planning weddings or events. For either job, the demand is high. Many planners start off organizing weddings and branch into planning events, or vice versa. Some planners combine both areas because the skills involved in Wedding and Event Planning complement each other so nicely. As you work through this course, you will learn a range of skills to create the career that's right for you.

Earnings Potential

Wedding and event planning can be profitable once you establish yourself and start to collect satisfied clients. A bride who is happy with the work you do on her wedding will recommend you to her friends and to other potential clients. Even for a new planner, the average income is good. Your income will depend on which region of the country you live in and on how many weddings you choose to plan in a year. As you establish your business, your income will continue to increase.

An Event Planner's business also depends on satisfied clients and word of mouth. Established Event Planners have built lucrative careers. Your income depends on the events you plan and on the type of client you decide to work with.

Getting started in the business is easier than you think. Once you learn the skills we teach you, all you'll really need to start working from home as a Wedding and Event Planner is a phone, an appointment book, Web site and possibly an ad in the Yellow Pages of your local phone book. We'll cover more of these logistics toward the end of the course. What you really need to know now is that, yes, you are on your way to a rewarding career working out of your home doing something you enjoy.

Make a Positive First Impression

Remember, the most important part of the Wedding and Event Planner's job is keeping her client happy. A satisfied client can help your business grow. How do you make a positive first impression so clients will want to hire you?

Because you've enrolled in this course, you're probably already excited about the world of special events and weddings. When you talk to a bride-to-be or someone who wants you to plan a special event, remember this excitement. Let your natural enthusiasm show. Also, put yourself in your client's shoes. Be aware of how nervous the people who come to you for help may feel. If you are interested in hearing about their event and calm about the planning process, they will be, too. And once you complete this course, you will have learned the skills you need to feel calm and confident about making your client's vision a reality.



If you show interest in your client's event, and remain calm and confident as you describe the planning process, you'll make a positive first impression.

In addition, successful Wedding and Event Planners focus on their clients' needs. They aren't trying to take over an event, or push the client into something she doesn't want. Later in the course, you'll learn how to listen to your clients in order to meet their needs.

Now that you've been introduced to the responsibilities of a Wedding and Event Planner, let's take a Practice Exercise.

Step 5 Practice Exercise I-I

For questions I through 7, select the best answer from the choices provided.

- 1. If you ever have a question about the U.S. Career Institute Wedding and Event Planner course, ____.**
 - a. save your question until the end of the course
 - b. call an instructor
 - c. ask a good friend
 - d. none of the above

- 2. All the mail-in quizzes and other assignments in this course ____.**
 - a. are open-book
 - b. cover only material you've gone over already in the course
 - c. are designed to highlight what's important in the course
 - d. all of the above

- 3. Each lesson in this course is designed in a ____ format.**
 - a. step-by-step
 - b. rote memorization
 - c. tricky
 - d. college textbook

- 4. The job of a Wedding and Event Planner ____.**
 - a. requires magic talents
 - b. is something most people either know how to do or don't
 - c. involves knowledge, creativity and practical skills you will learn as you go through the U.S. Career Institute Wedding and Event Planner course
 - d. none of the above

- 5. The most important thing a Wedding and Event Planner does is ____.**
 - a. get supplies for an event
 - b. arrange centerpieces
 - c. make her client happy
 - d. none of the above

- 6. Wedding and Event Planners are in great demand because ____.**
- a. there will always be a need for special events and people wanting to get married
 - b. most events are planned by family members, not professionals
 - c. most people don't have time to plan their own weddings and special events
 - d. both a and c
- 7. The best way to make a good first impression with clients is to ____.**
- a. show your enthusiasm about your client's wedding or event
 - b. put yourself in your client's shoes
 - c. appear calm about the planning process
 - d. all of the above
- 8. Explain why you're taking this course.**

Step 6 Review Practice Exercise I-I

- Compare your answers with the Answer Key at the end of this instruction pack. Correct any mistakes you may have made.

Step 7 Lesson Summary

- The Wedding and Event Planner is the person behind the scenes of a wedding or special event. She makes sure everything runs smoothly and that her client is happy. Her client has a vision for the wedding, party or special function. The planner keeps this big picture in mind and takes care of details. By planning and coordinating, the planner saves her client time and money. She also relieves stress so that her clients can enjoy their wedding, party, festival, meeting, convention or other special function.

The demand for Wedding and Event Planners is high because these days, most brides, party hosts and business people do not have time, knowledge or resources to plan special occasions. The planner may give initial advice or she may take care of all the details involved in to create a successful wedding or event. You may choose to focus on planning weddings, or you may focus on events. The skills involved in wedding and event planning complement each other. The most important thing is to make clients happy so that they will recommend you to others, which will increase your business. Once you get started working as a Wedding and Event Planner, you'll want to make a good first impression with clients. The way you do this is by letting your natural enthusiasm about their wedding or event shine through at the same time you make them feel calm about your ability to plan. The U.S. Career Institute Wedding and Event Planner course teaches you the skills you'll need to succeed in this career.

Step 8 Mail-in Quiz I

- Follow the steps to complete the quiz.
 - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
 - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
 - c. When you've finished, transfer your answers to the Scanner Answer Sheet included. Use only blue or black ink on your Scanner Answer Sheet.
 - d. **Important!** Please fill in all information requested on your Scanner Answer Sheet or when submitting your quiz online.
 - e. Submit your answers to the school via mail, e-mail, fax or, to receive your grade immediately, submit your answers online at www.uscareerinstitute.edu.

Mail-in Quiz 1

For questions 1 through 10, choose the best answer from the choices provided.

1. **A Wedding and Event Planner's first priority is ____.**
 - a. remembering details
 - b. keeping her client happy
 - c. explaining her own vision of the wedding or event to clients
 - d. none of the above

2. **The job of a Wedding and Event Planner requires ____.**
 - a. organizational and people skills
 - b. magic talents
 - c. complex, difficult-to-learn skills
 - d. all of the above

3. **A Wedding and Event Planner works to ____.**
 - a. fulfill her own vision of a client's wedding or event
 - b. keep clients involved in every detail of the planning process
 - c. make her client's vision a reality
 - d. none of the above

- 4. The reason people hire Wedding Planners is to ____.**
 - a. save time
 - b. relieve stress
 - c. ensure that their weddings or events go smoothly
 - d. all of the above

- 5. An Event Planner's clients may include ____.**
 - a. party hosts
 - b. nonprofit organizations
 - c. local businesses
 - d. all of the above

- 6. Sometimes people hire Event Planners to ____.**
 - a. plan corporate conventions
 - b. cater their parties
 - c. plan fund-raising events
 - d. both a and c

- 7. The demand for Wedding Planners ____.**
 - a. fluctuates a lot from year to year
 - b. remains high because people will always get married
 - c. is minimal because most brides' mothers plan their weddings
 - d. none of the above

- 8. The demand for Event Planners ____.**
 - a. grows as the economy grows
 - b. is low because most individuals and businesses have time to plan their own events
 - c. fluctuates because the need for special events comes and goes
 - d. all of the above

- 9. The earnings potential for Wedding and Event Planners ____.**
 - a. varies in different regions of the country
 - b. can be quite high
 - c. depends on how many weddings and events a planner does in a year
 - d. all of the above

- 10. Wedding and Event Planners make a good first impression with a client by ____.**
- a. showing interest in the client's wedding or event
 - b. telling the client about all the details that will be involved in planning
 - c. appearing calm and confident about the planning process
 - d. both a and c

CONGRATULATIONS

You've completed
Lesson 1.



Don't wait for your quiz results to continue with Lesson 2.

Today's Wedding and Event Planner

2

Step 1 Learning Objectives for Lesson 2

- When you have completed the instruction in this lesson, you will be trained to do the following:
 - ❖ Understand the role of a Wedding and Event Planner.
 - ❖ Describe what a Wedding and Event Planner does in a typical day.
 - ❖ Explain how the Wedding Planner creates lasting memories for the bridal couple.
 - ❖ Determine some of the steps involved in creating the “perfect” wedding.
 - ❖ Explain the Event Planner’s role in planning an event.
 - ❖ Determine the steps involved in creating a successful event.

Step 2 Lesson Preview

- Brenda Martin, a bride-to-be who is using your services, greets you at the front door of her family home before the doorbell has even stopped chiming. Brenda is excited about her upcoming big day and eager to talk to you about some of her new ideas. You have been helping Brenda plan her wedding all along, and she has confidence in you, her Wedding Planner.

Before she called you, however, Brenda had been anxious and daunted by the enormity of planning one of the biggest days of her life. She told you how overwhelming and complicated the whole process seemed. She simply didn’t know where to start. But, from the first moment you spoke to her, you began to ease her fears. You were sympathetic about how she felt. You were able to convey a real understanding of all that goes into a wedding and how to plan one. And you made it sound easy!



Before Brenda called you, she was overwhelmed about planning her wedding.

The previous lesson taught you that, as a Wedding Planner, you help make the bride's dream wedding a reality. Have you ever wondered how you do this and what it's like to help brides achieve their wedding dreams? In this lesson, you'll learn what role a Wedding Planner plays in the planning process. You'll see the day-to-day activities that planners encounter and the general steps involved in wedding planning. By the time you are done with this lesson, you'll understand what it takes to be a successful Wedding Planner—a person who helps couples realize their dreams.

Like weddings, events also involve careful planning. What does it take to plan a birthday party, a charity dinner, a corporate meeting or a high school reunion? These events may require different levels of planning, but they all require an Event Planner, someone who organizes the details for the client, makes arrangements for vendors—such as caterers, florists and hotels—and ensures that the event goes smoothly. As an Event Planner, you orchestrate! You're the one who orders flowers, hires entertainment and decorates the site, not to mention other tasks that will be discussed in this lesson. Finally, you bring guests together. Event Planners plan a wide variety of events, including graduation parties, engagements, company picnics, retirement parties, grand openings, anniversaries and even community-wide events. As an Event Planner, your responsibilities may include mailing invitations, organizing publicity, shopping for decorations, hiring caterers, setting up the event room, decorating the room, suggesting and organizing event activities and sending out thank-you notes after the event. These are just some of the Event Planner's interesting duties.

This lesson focuses on wedding and event planning, introducing you to some of the skills, typical activities and importance of the Wedding and Event Planner. You'll notice that many of the skills are similar between wedding and event planning. This lesson will get you acquainted with the world of the wedding and event planning, the day-to-day activities you'll encounter and the skills you need to do a good job. Wedding and Event Planners help their clients fulfill dreams.

Let's kick off the lesson by learning about the roles of a Wedding Planner.

Step 3 Make Dreams Come True

- ❑ Let's take a closer look at the Wedding Planner's role in making dreams come true. Then we'll follow a Wedding Planner to see what a typical day is like.

The Role of the Wedding Planner

As a Wedding Planner, you may play a number of roles to fulfill your client's vision of her special day. You may simply provide initial information to couples who wish to plan every aspect of their weddings, or you may be involved in all aspects of the planning. You may serve as a financial advisor or an expert in etiquette. You can work within the couple's budget to reserve sites and plan the rehearsal dinner, wedding ceremony and reception. You may, for instance, advise the couple on how to word invitations that appropriately honor their divorced parents or that indicate suitable attire for an outdoor or theme wedding.



As a Wedding Planner, you have many roles. For example, you may help a couple with the wording on their invitations.

You'll hire caterers, florists, musicians and photographers, and locate items so the bride's dress, cake and flowers coordinate. On the day of the wedding, you may handle problems as they arise. You might provide safety pins for the flower girl so the ribbons on her dress stay in place, for example, and no one will even know there was a problem! By keeping the big picture of the wedding in mind and keeping track of details, you'll make sure the wedding is everything the couple envisioned.

As a Wedding Planner, you can work one-on-one with the bride, groom and her family from the engagement to the honeymoon. By being efficient and organized, you ensure that all aspects of the important day proceed as planned. You work to get the bridal couple the best quality services and prices. You're the one with the ideas, resources and knowledge about wedding etiquette, all of which a bridal couple need to best pull off the wedding of their dreams.

If you're asked to plan a long-distance wedding, your role changes a little. Needless to say, it's a stressful task for a bride to plan a dream wedding in a town where she doesn't live. In this case, you do the same things you would if you were planning a wedding for a bride who lives in the same town as you. But you give the out-of-town bride a little more assurance that things are proceeding as planned, often letting her know that things are going smoothly. Instead of meeting in person, you may e-mail the bride photos or links to Web sites. Some long-distance brides plan several weekend trips to complete portions of the wedding plans. In this case, you would schedule some site and vendor meetings, such as site visits and cake tasting.

As you'll learn, your clients will have different needs, and it's your job to meet them. Oftentimes, you may begin consulting on a wedding before a date has actually been set. The mother of a bride, for instance, might approach you and ask for advice. Other couples, however, might decide they need your help closer to the end of the process. It may be five or six weeks before the ceremony, and the couple will want you on board to make sure everything happens as they've planned.

Ocasionally, you may have just a few hours with your clients. A bridal couple or the mother of the bride will meet with you to bend your ear and get ideas. Sometimes, though not always, busy clients will discover they just can't do it on their own, or are impressed with the creative ideas you've offered, so they'll return for your help.

The specific details of your job may change a little from wedding to wedding. But your primary role remains the same—keep your client's vision in mind, work to get the very best services for the bridal couple, provide resources and knowledge, save time and money and relieve stress.

A Day in the Life of a Wedding Planner

It's time to follow Nancy Ackman through a typical day as a wedding planner. Keep in mind that the days that Nancy spends in her office vary from the days that she spends at an event. Let's take a look at an office day for Nancy.

8:31 a.m. Nancy Ackman, a Wedding Planner, makes a call to one of her new vendors, a florist she's using for the first time. One of her brides, Amy Smith, saw the florist's work at a bridal show and fell in love with her style. Nancy is calling the florist to give her contact information for the baker for the Smith wedding, which will occur in three months. The baker wants to collaborate with the florist on the design of the Smith wedding cake. Together they will plan a four-tier fondant cake with deep reds and purples.



Nancy explains how she can help plan Karen's wedding even though she's out of town.

After the baker comes up with their final sketch, he will e-mail or fax it to Nancy to obtain the bride's approval.

8:43 a.m. An out-of-town bride-to-be calls. Her name is Karen, and she's rushed and sounds anxious. Karen says that she's very busy and has only a minute or so to talk, but wants to know if and how Nancy could help an out-of-town bride.

"Absolutely!" Nancy says. "I know that it is very nerve racking to plan an out-of-town wedding. It's so hard to know where the great sites are, and which vendors to use. You and I can work extensively together through e-mail and over the Internet. Then if you could make a trip out here before the wedding, we can spend a couple days to visit your favorite sites and meet some vendors."

"Actually, I am coming to town for an engagement party in two weeks. Perhaps we could meet then?" Karen replies.

"Sounds great! Why don't you, your fiancé and I have a phone meeting this weekend? We could go over your vision for your wedding, and discuss what type of site you might like. I can get you pictures and information next week of some options. Then when you come into town we could go visit your top choices."

Karen already sounds more at ease. "That sounds wonderful! How do you charge?"

"I can charge you hourly for now, and then we can work out a contract when you get into town that will fit your needs. I can e-mail you an hourly contract this weekend. Don't worry about it until then."

"Thanks so much Nancy, I feel better already. Why don't we speak Saturday morning?"

"I'll call you then. Have a great day and congratulations!" Nancy hangs up and types notes from the conversation into a contract journal for Karen. She will update it whenever they discuss the wedding in order to keep track of details.

9:10 a.m. Nancy calls one of her vendors, a videographer, for a wedding coming up in 3 weeks. Nancy's bride and groom want to know if they can add reception coverage. At first, the couple only wanted ceremony coverage, but has now decided they want a video of their first dances, cake cutting and toasts. They are concerned about bright lights and don't want annoying interviews of their guests, but the videographer assures Nancy that he is the utmost professional, and will be unobtrusive and his high-end equipment doesn't require bright lights. The videographer says the additional time will be no problem, and that the bride and groom may pay for the additional hours with their final payment.

11:30 a.m. Nancy packs up some of her business cards, a brochure and her camera. She heads to view a new site. She loves this part of the job—a tour and a free lunch with a new vendor. Knowing as many of the event sites as possible is crucial to Nancy's job.

2:00 p.m. Nancy returns to her office and checks her e-mail. Suzy, one of Nancy's brides, has sent Nancy an e-mail about her upcoming outdoor wedding. Suzy was at a wedding the previous weekend. It was tented, full of bugs and the tables sat on a dirt field. When it was too dark to see, they turned on a horrid temporary light that looked like it was rented from a construction company. She's now scared about her outdoor wedding next spring.

Nancy replies to Suzy's e-mail and assures her not to worry. An outdoor, tent wedding involves knowledge and careful planning. She tells Suzy that their rental company can bring in a wood floor so they won't feel like they're in a field. Plus, it'll help keep dust out. A bug bomb the night before will help get rid of bugs. Nancy also offers some ideas on how to dress up the tent. Nancy has a great lighting company that can hang paper lanterns from the ceiling and install lights that will shine from the ground to the tent walls. These lights will provide enough light for eating and dancing. Nancy includes some Web site links to the lighting company so Suzy can see their work. In addition, Nancy includes photos of some gorgeous tent pictures with floral-lined sidewalks and decorated tent poles. Nancy hopes this will ease Suzy's mind and give her some inspiration.

3:00 p.m. Nancy writes notes about her site visit and saves the photos in her files. She thinks this new site would be great for a Bat Mitzvah she's working on, and makes a note to call the mother of the birthday girl to tell her about it.

Step 4 “I Couldn't Have Done It Without You!”

- Now that you know more about the Wedding Planner's role, it's time to look at the planner's importance. Then we'll examine the initial steps to plan a wedding.

Why Wedding Planners are Important

There are a number of reasons why a couple will decide to hire a Wedding Planner. But most couples see the planner as someone who can save them both money and time as well as offer valuable resources. The planner has creative ideas and knows how to make a couple's day special while staying within their budget. Some couples may be planning long-distance weddings and need the planner to take care of the details they aren't able to handle. Other couples may be planning an interfaith wedding and, because she is familiar with different traditions and etiquette, a Wedding Planner can greatly ease their worries. One couple may be marrying for the second time and doesn't want the stress of planning details another time around, while another may want creative ideas for a theme wedding. Every couple is different, but every couple can benefit from a Wedding Planner's services.

A Wedding Planner is particularly important to couples and their families because she does not have any emotional attachments for the day. To be more precise, she does not have any overwhelming emotional connection to the day—she simply wants everything to proceed as smoothly as possible.

The Wedding Planner's focus is not cluttered by the emotion. So when a Wedding Planner plans a wedding, families of the couple and the couple themselves can enjoy the weeks and days leading up to the special day, as well as the day itself. Before the wedding begins, the mother and father of the bride can enjoy one of the most important days in their daughter's life without having to worry about the music, flowers or photographer. It's a very special day, and the Wedding Planner is there to handle the details as well as any problems that arise. The role of everyone else is simply to enjoy the wonder of the day!

The Steps Involved to Create the Perfect Wedding

Although almost no wedding is absolutely perfect, you can make your clients' day a glorious one and as close to their vision as possible. That's why couples hire a Wedding Planner. You're probably already familiar with some of the aspects of planning a wedding, whether it was your own, a friend's or that of a family member. Going through the following exercise will show you how much you already know.

Let's start off by having you make your own "to do" list. Pretend this list is for your ideal wedding, whatever that might mean for you. Include as many details as you like. You might start by listing some of the basics. When and where will you hold the wedding? Then let yourself go a little. Would a swing band make your wedding perfect? Maybe you'd like a harpist to perform at the ceremony. How about a limo to carry the newlyweds off into the sunset? Remember, this is a list for your perfect wedding. There are really no wrong answers and your list can be as long or as short as you'd like.

To Do List	
1.	Hire a Wedding Planner _____
2.	Outline a guest list _____
3.	Define your vision—research pictures and ideas _____
(Now you take over!)	
4.	_____
5.	_____
6.	_____
7.	_____
8.	_____
9.	_____
10.	_____
11.	_____
12.	_____
13.	_____
(Keep going if you like, or stop here.)	

Now, look at our list and see how many of these things you already managed to cover.

To Do List

1. Hire a Wedding Planner. _____
2. Outline a guest list. _____
3. Define your vision—research pictures and ideas. _____
4. List your priorities. _____
5. Outline a budget—don't place numbers on categories. _____
Instead, decide how you'll pay and set a guideline of _____
how much to spend. _____
6. Research sites. _____
7. Choose a date. _____
8. Announce your engagement. _____
9. Shop for stationary for your event (save the date _____
announcements, invitations, menus, programs, _____
thank you notes). _____
10. Send your save-the-date announcements. _____
11. Pick a photographer. _____
12. Shop for your dress. _____
13. Choose a florist. _____

The list you came up with on your own may have been more personal or creative than this one. The items listed here are just some of the essentials of planning we will be teaching you as the course continues. If you covered half or more of these on your list in some way, good job! You were able to identify some of the basic needs for most every wedding.

There are some important items for you to consider as you look over your list. One thing is certain—it's your list of things that make for an organized, smooth wedding. It will be helpful to remember that the "perfect wedding" means something different for each couple. Remember this and you'll soon establish a reputation for organizing perfect weddings.

Let's take a moment to practice what we've learned so far.

Step 5 Practice Exercise 2-1

□ For questions 1 through 8, choose the best answer from the choices provided.

1. **The Wedding Planner's role _____.**
 - a. varies from wedding to wedding
 - b. includes being an advisor, an expert on wedding etiquette and a referee
 - c. is to fulfill her client's vision of her wedding
 - d. all of the above

2. **When planning a long-distance wedding, a Wedding Planner _____.**
 - a. tells the client about all problems that arise
 - b. offers the out-of-town client a little more assurance that things are proceeding as planned
 - c. must travel to the client's house for a consultation
 - d. none of the above

3. **On the day of the wedding, unforeseen problems _____.**
 - a. sometimes come up
 - b. never occur because the Wedding Planner is such a careful planner
 - c. are handled by the Wedding Planner as they arise so her client doesn't worry
 - d. both a and c

4. **A good Wedding Planner works with vendors to _____.**
 - a. get her client the best prices on such services as flowers, food, music or decorations
 - b. make a commission for herself
 - c. give business to florists and caterers in her town
 - d. all of the above

- 5. On the day of the wedding, the Planner ____.**
- can never enjoy herself
 - should not attend the ceremony
 - enjoys the satisfaction of a job well done
 - none of the above
- 6. The steps in planning a wedding ____.**
- can be personal and creative depending on the wedding
 - differ completely from wedding to wedding and can't be listed
 - vary from wedding to wedding but include certain basics this course will teach you
 - both a and c
- 7. A Wedding Planner can focus on making sure things run smoothly because she ____.**
- doesn't have the same emotional connection to the day as the family does
 - is usually a relative of the bride who cares deeply about her special day
 - has lots of help from the bride and groom and their family members
 - all of the above
- 8. Wedding Planners are important because they ____.**
- can help save the couple time and money
 - have creative ideas
 - can take care of details the out-of-town client can't handle
 - all of the above

Step 6 Review Practice Exercise 2-1

- Compare your answers with the Answer Key at the end of this instruction pack. Correct any mistakes you may have made.

Now that you've learned about the Wedding Planner's duties, let's look at the Event Planner's responsibilities.

Step 7 From Vision to Reality

- It's time to examine the Event Planner's role and look at a typical day.

The Role of the Event Planner

Like many people, you've probably attended a public event with catering, decorations, a formal speaker and musical entertainment. If the event was successful, you didn't spend a lot of time thinking about what went into all of the planning because you were enjoying yourself. This was thanks to the Event Planner, the person who organized the details, made the arrangements, confirmed the arrangements and brought everything and everyone together to create a successful event.



Think about the planning that went into the last event you attended.

The Event Planner is responsible for a variety of tasks and finds reward in knowing her planning has resulted in a successful event. In the context of an event, "successful" means that the arrangements were in line with the client's vision. For example, you wouldn't hire a loud metal band for an 80-year-old's birthday party (unless the client requested it!). This example is extreme, but the details will vary when you meet with your client to discuss his or her vision. You'll meet with your client at an initial interview. This initial meeting is where you'll learn about the client's vision and his or her budget. Budgets can be stretched in a number of creative ways, but the client's vision must be kept in mind above all else.

What are some of the skills you'll need to fulfill your role as an Event Planner? Here are a few:

- ❖ **Organization**—Lists of event locations, useful phone numbers, "to do" lists and appointment schedules will aid you in organization. If you plan more than one event at once, lists will be helpful in separating and organizing the things you need to do for each event.
- ❖ **Creativity and practicality**—If there is a problem with planning, the Event Planner needs to be able to think of alternatives that will please the client. As an Event Planner, you need to be good at thinking "out of the box" but have the practical sense required by your client's budget. The successful Event Planner knows and sticks to the budget, but also has creative ideas that contribute to the client's vision.



A successful Event Planner sticks to the client's budget.

- ❖ **Interpersonal skills**—The ability to get along and communicate well with all types of people will help you establish and maintain contacts. This is useful in relieving stress, providing information, getting discounts for clients and establishing relationships with businesses that may help you with future events. Businesses are often willing to provide free samples or services in exchange for free advertising. For example, you may be able to get a few free flower arrangements if you agree to use the florist for future events. Or, you may be able to get a free banner from a printing company if you distribute that company's coupons or mention its name at the event.
- ❖ **Client rapport**—Last, but certainly not least, the successful Event Planner must establish a rapport with the client and stick to the client's vision for the event. You're there to offer suggestions and ideas, but ultimately it's the client's event. Your role is to satisfy the client by planning the event to his or her specifications. Most likely, though, the client will be open to your suggestions and ideas because you have the resources and practical knowledge about planning events. Fulfilling the client's vision will also establish your reputation and make it easier for you to acquire new clients. A happy client will tell a friend about you. And the more events you plan, the more experience you'll have, too!

Expert Advice

If you're planning multiple events, use a large bulletin board where you can post lists, phone numbers, etc. Write lists and phone numbers for each event on different colors of paper. For example, use bright orange paper for a child's birthday party and gray paper for a corporate fundraiser. In other words, try to match the paper color to the theme of the event. This will help you organize both visually and mentally. This is a simple organizational tool to help you see at a glance what you'll need to do for the day.

An Event Planner's Typical Day

One of the exciting things about being an Event Planner is that no day is the same. Event Planners handle a variety of tasks that change from day to day. The reason for this lies in the nature of planning events—they're all different. Each event is different depending on the people who attend, the reason for the event and the overall mood of the event itself.

Maybe you'll start your day early. Some businesses, however, open at 8 a.m., some at 9 a.m. and some not until 10 a.m. (especially restaurants). Perhaps the caterer you need to speak with is out until early afternoon. The nice thing about being an Event Planner is that you'll have a flexible schedule. You can get up early and take care of things at home while you make your early calls for later pick-ups, appointments or shopping. Here's an idea of a typical day in the life of Shirley Byatt, Event Planner.

8:00 a.m. Shirley eats breakfast and checks over what she has to do for the day. She decides to take care of some phone calls regarding two locations for two different events she's planning—one event is an engagement party and the other is a company dinner. First she calls the Weston Hotel to confirm the ballroom reservation for the engagement party and requests the confirmation in writing.

Next she calls the Shamrock Pub and Grill to schedule reservations for the company dinner. Then she makes a shopping list for decorations and is out the door and on her way to a party supplier to buy white paper tablecloths for the engagement party and green streamers for the company dinner.

10:15 a.m. After buying the supplies, Shirley stops at the florist's to look at the samples of centerpieces for the engagement party. She knows the client wants either colorful gerbera daisies or white and yellow daisies, depending on the price. The white and yellow daisies are within the client's budget, but only for the small, guests' tables. Shirley knows that her client wanted some gerbera daisies, but can't afford to do all of the centerpieces with them. So, she decides to use gerbera daisies for the two larger centerpieces that will be set upon the couple's table. Voilà! Shirley's just made a creative but practical decision. She fills out an order form for the flowers and makes a down payment. Then she returns home to make some more calls and eat a quick lunch.



12:45 p.m. The phone rings. It's the kitchen manager from the Shamrock Pub and Grill, asking if he can move their 2:00 meeting to 3:00.

"I'm running a little late today, Shirley," he apologizes.

"No problem, John," she says. "I understand."



Shirley stops by the florist to look at flowers for an engagement party.

She takes the time to call Betty Showning, her client for the engagement party to okay the flower decision with her. Betty's not home, so Shirley leaves a short message on her voicemail. She has time before meeting with John to stop by the hotel to check out the ballroom to make a quick sketch of the room's layout and snap a photo for her bulletin board so she can think about the room set-up later.

1:11 p.m. Out the door again, Shirley heads for the hotel. When she arrives, she picks up the confirmation letter she requested earlier and checks out the ballroom. It's a beautiful, elegant room, and Shirley feels a thrill imagining what it will look like when it's all decorated. She takes out her notepad and draws up a quick floor plan. She also checks her e-mail on her Blackberry and makes a few notes to herself.

2:16 p.m. Shirley runs a few personal errands while she's waiting to meet with John, the kitchen manager, so she stops by the bank and then picks up her dry cleaning.

3:00 p.m. Shirley meets with the kitchen manager and looks over the buffet menu for the company dinner. She makes choices regarding quantity, type and expense of the food. She decides on the corned beef and cabbage as the main course since the company's Human Resources Manager requested a traditional St. Patrick's Day dinner. When she arrives home, she calls and confirms the dinner menu with the company manager. "I'm hungry already," he laughs.

4:30 p.m. It's now about 4:30 p.m. Shirley has done a lot today, but she'll have a slower day tomorrow. Maybe tomorrow she'll call a few talent agencies to get audio samples of musical acts. Or maybe she'll print the invitations for the engagement party. Right now she's ready to relax!

Your days as an Event Planner may be different from Shirley's. If the event is more involved, you may be working with committees to help you plan. You can often get volunteers to help, especially for community or city festivals. Relatives and friends are usually happy to help in planning events. For an Event Planner, no day will be routine—some days will be hectic and others will be more relaxed—but you can count on one thing: when the event is successful, you'll receive the reward of seeing your client happy and the guests satisfied. And since you may attend some of the events, you'll get to see your clients' and guests' reactions in person. When you're done planning, you can enjoy what you helped to create! You'll be there to receive compliments from your client for a job well done and perhaps you'll meet new clients as well.

In conclusion, the best part about the Event Planner's day is that it isn't mundane—you have a very flexible schedule and you have fun too.

Step 8 Make It Happen

- Event Planners play an important role in bringing a client's vision to life. Let's look closer at their important role and explore the initial steps to plan an event.

The Importance of Event Planners

Event Planners are responsible for maintaining the client's vision but also for using their own creativity to make judgment calls about things that the client doesn't have time for. Clients hire Event Planners because he or she doesn't have time to do everything. You're there to make some of the decisions for the client, while sticking to the client's vision and budget. For example, the Event Planner may decide on a colorful banner for a child's birthday party, even if the client didn't request it. As long as it is within the client's budget, the Event Planner can make decisions about smaller details that the client may have forgotten about or may not have time for.

The Event Planner's role is important because it fulfills a need for clients who don't have time to plan the event themselves. Without Event Planners, a client would have to make all the phone calls, travel to the site, fill out paperwork at the florist, send faxes and make appointments with caterers and bartenders. And that's only part of the list of duties. These details and arrangements take a lot of time for one person if he or she is also working at a full-time job. People who don't have time to make these arrangements may not be able to plan a successful event, one that will be satisfying and fun for guests. They may not have time to get the best price for flowers or decorations, or they may not have time to find the best kind of entertainment for the event. Taking care of all these details for the client is the Event Planner's job!

Coordinating all the details of one or more events may sound overwhelming, but because the Event Planner's job is flexible, she can take on as many or as few events as she wants.

The Steps Involved in Creating a Successful Event

You probably already have ideas about how to plan a special event. You know that you must first meet with the client and set the date, decide on details such as decorations and catering and send out invitations. The number of steps it takes to plan an event depends on the nature of the event: its theme and size. Every event will involve different levels of planning. There are fewer steps involved in planning a birthday party than there are in planning a community arts fair, for example. But the order of the basic steps is the same. You meet with the client, set the date, decide on and organize the details, make arrangements and confirm the arrangements. After the event you may be in charge of arranging clean-up, sending out thank-you notes and following up with the client.

As a practice exercise for planning events, make your own "to do" list for the steps in planning an event. You may find that you can already guess what many of the steps would be. Just for fun, imagine you're planning a theme birthday party for a ten-year-old boy. Imagine that you have an unlimited budget! This will make it easier to come up with several creative ideas for the event. Include as many details as you can think of. No one will see this list but you!



Imagine that you're planning a theme birthday party for a 10-year-old boy.

To Do List

1. Talk to the boy and his parents about their ideas for a theme (safari, robots, superhero?).
2. Set the date (preferably close to his birthday, right?).
3. Choose a location.

(Now you take over!)

- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.

(Keep going on a separate sheet of paper if you want!)

Now take a look at our list. It's a "generic" list of what to think about for any event. The list you came up with on your own is probably more interesting than this one (maybe it includes a trip to the zoo, robot decorations or a person in a superhero costume!). The items listed here are just some of the essentials we will be teaching you in the event planning section of the course. If you covered half or more of the following items on your list, you did well! You were already able to identify some of the basics needed for almost any event.

To Do List

1. Talk to the boy and his parents about their ideas.
2. Set the date (perhaps the Saturday before or after his birthday?).
3. Choose a location.
4. Decide on food.
5. Decide on entertainment.
6. Decide who will help with the stages of the party.
7. Visit location to get an idea of the set-up for the event.
8. Send out invitations.
9. Hire caterer and entertainment.
10. Plan and shop for decorations.
11. Confirm arrangements for location, caterer and entertainment with both the client and the businesses.
12. Decorate the site.
13. Arrive at site early to oversee set-up for catering and entertainment.
14. Follow up by attending event or calling client.
15. Send thank-you notes to client, caterer, entertainment, etc.

Compare your list to the list above. You may have added details about the specific type of location; the kind of catering, entertainment and decorations you would use, and any other details you thought of to plan the event. You probably covered most of the steps on the list; you just need to put it into practice and get experience planning different kinds of events. Later on in the course, you'll learn more about some ins and outs of planning events. Right now, you just need to visualize yourself planning an event. It's important to remember that planning events is fun and different from event to event. Use your creativity as much as possible—mixed with some practical sense—and you'll be on your way to being a successful Event Planner.



Your event "To Do" list may include general items or more specific details. Either way, lists help Event Planners stay organized.

Step 9 Practice Exercise 2-2

For questions 1 through 10, choose the best answer from the choices provided.

1. **An Event Planner organizes events such as _____.**
 - a. corporate fund-raisers
 - b. birthday parties
 - c. city or community festivals
 - d. all of the above

2. **A successful event means that, above all, the Event Planner has kept the client's _____ in mind.**
 - a. musical tastes
 - b. personal schedule
 - c. vision
 - d. none of the above

- 3. An important skill required of an Event Planner is ____.**
 - a. organization
 - b. the ability to establish rapport with the client
 - c. creativity
 - d. all of the above

- 4. An Event Planner's day may consist of ____.**
 - a. calling the client to confirm a decision
 - b. a routine schedule
 - c. shopping for decorations
 - d. a and c

- 5. The role of the Event Planner is to ____.**
 - a. be the honored guest at the party
 - b. prepare petitions requesting funds at a fund-raiser
 - c. organize, plan, arrange and confirm details of an event for a client
 - d. decide on how much the client spends on the event

- 6. The main reason clients hire Event Planners to plan events is that the clients don't have the ____ to do it themselves.**
 - a. money
 - b. time
 - c. knowledge
 - d. schooling

- 7. Event Planners can plan ____.**
 - a. as many events as they wish
 - b. only one event at a time
 - c. only birthday parties
 - d. events for one client at a time

- 8. At the initial interview with a client, the Event Planner discusses the ____.**
 - a. budget
 - b. location
 - c. event date
 - d. all of the above

9. Part of the Event Planner's role is to make decisions ____.
- to fit the client's budget
 - about decorations
 - about smaller details the client doesn't have time for
 - all of the above
10. The number of steps it takes to plan an event depends on the ____ of the event.
- location
 - guests
 - theme and size
 - time

Step 10 Review Practice Exercise 2-2

- Compare your answers with the Answer Key at the end of this instruction pack. Correct any mistakes you may have made.

Step 11 Lesson Summary

- Now that you've read this lesson, you have a better idea of what Wedding and Event Planners do. You have learned about the skills required for a Wedding and Event Planner as well as the responsibilities and importance of the Wedding and Event Planner to the client. You know that you can be successful at planning events using your creativity and practical sense. You realize that it is important to establish a good relationship with the client as well as with local businesses. You have an idea of the steps involved when planning events and know that different kinds of events take different levels of planning. Now that you have a better understanding of event planning, you can create some practice lists of your own for different kinds of events so that when you meet with your first client, you'll be organized, informed and prepared to ask the right kinds of questions. The most important thing to remember is that you, as a Wedding and Event Planner, are the key to making events fun and successful!

You also explored the many different activities that go into a Wedding and Event Planner's typical day, getting an idea of how many different things she does. You learned about the important function that a Wedding and Event Planner serves in creating lasting memories for the bridal couple and clients. Last, you learned about the varying steps involved in creating the "perfect wedding" or ideal event. You've also examined how each client's vision of a perfect event will be different and that the role of a Wedding and Event Planner is to fulfill her client's wishes.



You'll plan successful, memorable events and make your clients' visions a reality.

Step 12 Mail-in Quiz 2

- Follow the steps to complete the quiz.
 - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
 - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
 - c. When you've finished, transfer your answers to the Scanner Answer Sheet included. Use only blue or black ink on your Scanner Answer Sheet.
 - d. **Important!** Please fill in all information requested on your Scanner Answer Sheet or when submitting your quiz online.
 - e. Submit your answers to the school via mail, e-mail, fax or, to receive your grade immediately, submit your answers online at www.uscareerinstitute.edu.

Mail-in Quiz 2

For questions 1 through 20, choose the best answer from the choices provided.

1. **Wedding Planners sometimes act as _____.**
 - a. etiquette experts
 - b. special guests at the wedding
 - c. financial advisors
 - d. both a and c
2. **All weddings are _____.**
 - a. the same
 - b. easy to plan for
 - c. at least a little bit different
 - d. none of the above
3. **A Wedding Planner saves the bride _____.**
 - a. time
 - b. money
 - c. stress
 - d. all of the above

- 4. A Wedding Planner _____.**
- a. does not work on long-distance weddings because it's too hard
 - b. works on long-distance weddings
 - c. does not work on a wedding unless both parties have rings and the wedding has been officially announced
 - d. none of the above
- 5. A Wedding Planner may work _____.**
- a. with a bridal couple for a few hours to help them brainstorm
 - b. from the engagement to the honeymoon
 - c. a few weeks before the wedding to pull everything together
 - d. all of the above
- 6. The role of the Wedding Planner _____.**
- a. is to tell the bridal couple what they have to do
 - b. is to work to get the bridal couple what they want
 - c. may change, at least slightly, from wedding to wedding
 - d. both b and c
- 7. A Wedding Planner _____.**
- a. works with vendors
 - b. handles little problems that occur before or at the wedding
 - c. will often be asked to sing at the wedding
 - d. both a and b
- 8. Out-of-town couples hire Wedding Planners because Wedding Planners _____.**
- a. live in the town where the wedding is going to take place
 - b. have resources in the town to get the best prices and services
 - c. can save couples time, stress and money
 - d. all of the above
- 9. In a typical day, a Wedding Planner _____.**
- a. usually does just one or two things
 - b. performs a number of tasks, including planning more than one wedding
 - c. spends most of her time reading
 - d. none of the above

- 10. A Wedding Planner is ____.**
- a. dedicated to fulfilling her client's vision
 - b. someone who helps plan the wedding and sometimes the honeymoon
 - c. has knowledge and resources that many bridal couples do not have
 - d. all of the above
- 11. An Event Planner makes arrangements with ____ when planning events.**
- a. friends
 - b. businesses such as caterers, florists and hotels
 - c. guests
 - d. none of the above
- 12. You'll meet the ____ at an initial interview when preparing to plan an event.**
- a. caterer
 - b. florist
 - c. musical entertainment
 - d. client
- 13. The Event Planner can make decisions about ____ as long as they fall within the client's budget.**
- a. smaller details
 - b. location
 - c. date
 - d. all of the above
- 14. A helpful organizational tool to use when planning multiple events is a ____.**
- a. telephone book
 - b. bulletin board
 - c. multicolored list system
 - d. b and c
- 15. Event Planners have good interpersonal skills that enable them to ____.**
- a. establish and maintain contacts
 - b. make major decisions without consulting the client
 - c. perform in front of an audience
 - d. fill out tax information for the client

- 16. An important step in planning events is to _____ every arrangement.**
- a. reschedule
 - b. confirm
 - c. enhance
 - d. none of the above
- 17. When planning city or community events, you can often get _____ to help with the planning.**
- a. friends
 - b. relatives
 - c. volunteers
 - d. all of the above
- 18. It is sometimes important to _____ the event in order to examine the results and help with aspects of the event.**
- a. record
 - b. attend
 - c. cater
 - d. all of the above
- 19. Event Planning can be either full-time or part-time depending on the _____ of events an Event Planner takes on.**
- a. type
 - b. location
 - c. number
 - d. none of the above
- 20. Event Planners are important because they make events _____.**
- a. easier to budget
 - b. easier to plan for the client
 - c. successful based on their own experience in planning
 - d. b and c

CONGRATULATIONS

You've completed
Lesson 2.



Don't wait for your quiz results to continue with Lesson 3.

Kick Off Your Event Planning

3

Step 1 Learning Objectives for Lesson 3

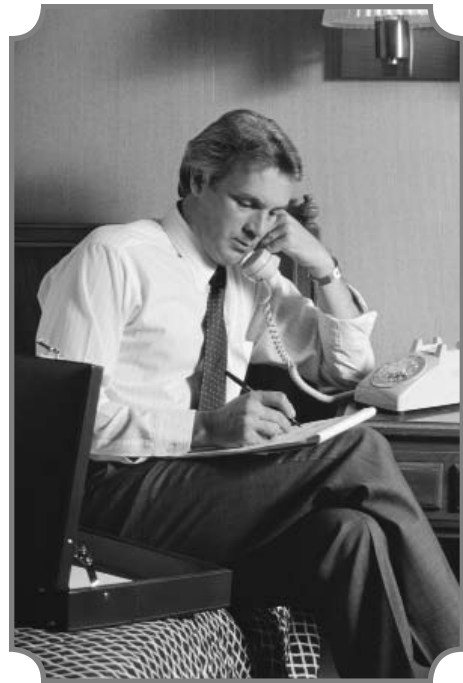
- When you have completed the instruction in this lesson, you will be trained to do the following:
 - ❖ Describe how to answer the initial call about your services.
 - ❖ Assess what level of service the client needs.
 - ❖ Identify your client's vision of their special event.
 - ❖ Compile a portfolio of previous events you've planned.
 - ❖ Present your services in a professional and compelling manner.
 - ❖ Explain your services and fee structure.
 - ❖ Determine where the event is to be held.
 - ❖ Discuss an event budget.
 - ❖ Identify who and how many people will be attending the event.
 - ❖ Offer creative suggestions to meet your client's needs and begin the design process.
 - ❖ Create an event planning checklist that is tailored to each event.
 - ❖ Organize planning details using professional forms.

Step 2 Lesson Preview

- You're a Wedding and Event Planner who has successfully coordinated several weddings, leaving the newly married couples with fond memories of their special days and you with great career experience. One day you receive a phone call from the administrative assistant of a neighborhood club you belong to. She needs to set up a party for the president of the club, who's stepping down after ten years of service, and knows she won't have the time to arrange it alone. You cheerfully tell her you'd be glad to help. After all, you know that planning any other type of event is very similar to planning a wedding.

Or perhaps you've already decided to focus your services on planning events other than weddings. There are so many other events in our lives—both personal and professional—that can be time and energy consuming to arrange. Event Planners are needed to help companies organize their annual picnics or training seminars, to help non-profit organizations set up fundraisers such as fun runs or book fairs and to assist children who hope to surprise their parents with a 25th wedding anniversary party at the local country club. The list of occasions we celebrate or reasons we gather together in groups are almost endless!

For any of these events, as with a wedding, the first steps you'll take include (1) fielding the initial call from your prospective client, (2) establishing what services they might need, (3) explaining your services and fees, (4) setting up a face-to-face meeting and, most importantly, (5) learning what your client's goals are for the event. This lesson will teach you the important questions to ask during the initial client interview, how to present your services and fees to the client, what first decisions a client must make, how to tailor your services to each client's unique situation and how to organize planning details. Let's dive into Event Planning!



In this lesson, you'll learn how to field initial calls from clients.

Step 3 Fulfill Your Client's Vision— A Review of the Event Planner's Role

- As you already know, an Event Planner is the person “behind the scenes” who helps arrange all the elements of a particular event—from location to refreshments to entertainment to décor. He or she does this so smoothly that it almost seems the event runs itself. As an Event Planner, you offer an invaluable service to busy executives, city officials and families—anyone trying to gather a group of people together in a particular location for a specific event or occasion. You take the “planning weight” off the shoulders of people who may not have the experience, knowledge, time or energy to successfully pull together an event. You can conduct research to find the best caterer, meeting room, entertainment, florist or security firm to meet your clients' needs, both in terms of budget and their goals for the event. You can handle scheduling, delivery, staffing and locating materials and equipment necessary for the event. And, by overseeing the activities on the actual day of the event, you make it possible for your clients to relax as they watch their vision being fulfilled.

Like Wedding Planners, Event Planners are more and more in demand as people in today's hectic world try to find ways to save time and energy. A successful Event Planner has skills similar to those of a Wedding Planner. Some people do both, while others choose to specialize in weddings or events. In either case, you will need to be diplomatic, a creative thinker, good communicator and be very detail oriented and organized. As an Event Planner, you will be concerned with many of the same questions as a Wedding Planner. What type of food should be served? Who is attending the event? Where should it be held?

Unlike a Wedding Planner, however, in your role as an Event Planner you may be asked to arrange corporate events such as conventions, trade shows or meetings. In addition, you'll also plan community-wide events, as well as private social events. While the basic questions remain the same whatever type of event you are planning—who, where, when and for what purpose—an Event Planner deals with events with a variety of purposes, so you'll need to consider a variety of issues. For example, because some of the events you help plan may cost guests to attend, you'll need to consider questions such as how much to charge for tickets, how to promote the event



Event Planners arrange community-wide events and conventions.

to increase sales and how to collect ticket fees and handle cash on the day of the event. Or, if the event is a public one, like a community picnic, you may have to consider such questions as city permits, how to estimate how many people will attend, how to control the flow of the crowd and so on.

Here are some possible events you may help to arrange:

Professional

- ❖ Corporate retreat
- ❖ Training seminar
- ❖ Retirement party
- ❖ Stockholders' annual meeting
- ❖ Trade conference or convention
- ❖ Company picnic
- ❖ Company holiday parties
- ❖ Grand opening
- ❖ Sales meetings or other team meetings

Community

- ❖ Seasonal events (Oktoberfest, winter carnival, Fourth of July picnic in the park)
- ❖ Fundraising events (silent auction, walkathon, book fair, etc.)
- ❖ Free concert series
- ❖ Festivals (town festivals, centennial celebrations, art fairs)

Private Social Events

- ❖ Anniversary party
- ❖ Bar mitzvah or Bat mitzvah
- ❖ Sweet 16 party
- ❖ Birthday party
- ❖ Christening
- ❖ Holiday parties
- ❖ Family reunions
- ❖ Class reunions

As you can see, there is a wealth of possibilities of events to manage. Remember that whether you are a Wedding Planner or an Event Planner, your primary concern is the same—to make the particular vision your clients have of their event become a reality.

Step 4 Initial Client Interview

- ❑ Your initial contact with a client will usually be a two-part effort—first, a call from the client inquiring about your services, then a follow-up face-to-face meeting with the client to present your services further and help you identify their specific needs and goals.

First Contact—File Calls from Prospective Clients

The first “meeting” you have with a client will likely be over the phone. The person may have heard of your services from one of your former clients or read your advertisement in the yellow pages. No matter how they found you, once you have them on the phone, look at the call as your opportunity to begin making a favorable impression on the client. It is also a chance to begin gathering information that will help you tailor your services to their needs.

You have probably heard the saying “A person only has one chance to make a first impression.” How true this is! You want to make sure that the first impression your prospective client receives of your services is a positive one. Try to hit a mix of enthusiasm and professionalism. You want to sound competent. It’s certainly okay to sound friendly but, depending on the personality of the person you’re talking with, avoid being too chatty. This is especially true if your caller is a business client who must always be conscious that “time is money.”



Some clients call because of your advertisements.

In addition to the way you speak, the questions you ask your caller can create a favorable impression. If you ask questions that show you recognize the most important aspects of planning an event, such as where and when the event is to take place, your caller will feel confident in your abilities as a planner. One way to show your caller that you fully understand what they’ve said about their goals for their event is to use the technique of *reflecting back*. When you **reflect back**, you restate what has been said. You’ll learn more about this technique in the next lesson.

Important questions to ask during the first call are:

- ❖ What type of event is being planned?
- ❖ What steps have already been taken toward planning the event?
- ❖ When is the event to take place?

When you start working on events, you can use the following “Event Planner’s Initial Client Interview” form to guide you through this first conversation and to make note of your client’s needs. At this stage, the questions you ask over the phone need to explore the general needs of the client. Although you want to gather useful information, avoid getting too specific about details such as the names of the guests, type of prizes offered at the event or food choices, for example. These types of details are better discussed in person and after you have confirmed that the client will be using your services.

**Event Planner Form
Initial Client Interview**

Today's Date: _____

Client's Name: _____

Mailing Address: _____

Phone Number: _____

Occasion: _____

Tone/Purpose: _____

Theme: _____

Fundraising Goal: _____

Event date: _____

Budget: _____

Type of Guests: _____

Ticket Price: _____

Committee: _____

Location: _____

Special wishes or details: _____

Listening carefully during the initial call helps you identify the factual information—what, when, who—and can also give you clues about the client's needs and style. Does he sound hesitant, unsure of exactly what he needs? Is he very sure of what he wants? Some callers may need you to be more “hands-on,” taking charge of all aspects of the event, while others may require only a list of caterers, meeting halls, etc., and then can take it from there. While it's best to be yourself when talking to a prospective client, try to adjust your style to the client's a little. For instance, a hesitant caller may need a personal approach, while a more straightforward speaker may appreciate it if you also adopt a more businesslike manner.

Explain Your Services and Fees

Many of your callers, especially if they are calling about a social event, may not completely understand what an Event Planner does. As callers tell you what type of events they plan and what steps they've already taken, let them know how your services apply to their needs. Also, don't be shy about asking clients directly, "What kind of help would you like with this event?"

Some callers may be seeking only the name of a reputable caterer or a suggestion for a game for a child's party. If this is the case, experienced Special Events Planner and author Robin Kring suggests that if you can name a vendor or party game off the top of your head, you can cheerfully share this information with the caller. This creates goodwill with callers and may result in hiring you to plan a future event. However, if a question requires you to do any research, you need to discuss the caller's engaging your services as a consultant. You want to be helpful, but be careful not to work for free!

If a caller seems to want more than a quick suggestion for a party game, the next step is to explain what services you offer. Depending on your client's needs, you may offer only advice and a list of vendors, or you may help create decorations for the event. Or you may be asked to plan and coordinate all aspects of the event. These services are not always as distinct as wedding services tend to be—often one type of service will combine others, depending on your client's needs. For the sake of clarity, we'll break down these different types of services into three categories—Consulting, Retail Services and Event Planning and Coordination.



Depending on your client's needs, you may help choose and arrange the event decorations.

Consulting

You may be hired only for advice and, for example, a list of suitable vendors or locations, then the client takes over from there. When serving as a consultant, you might also review the contracts of vendors and help the client set up a plan for the event. You may also provide a "design" for the event as a whole, and the client will take care of finding vendors and services to match the plan you've provided.

Retail Services

You may have become involved with Event Planning because your family, friends and friends of friends were always asking you to create special centerpieces for anniversary parties, or to make balloon animals for children's parties. As you worked on these crafts, you may have been asked, "Do you also know where I can get a cake?" and thought, "I'm a baker, too." It may have occurred to you that you could get paid for doing what you love and giving advice. Or, when organizing a party, you might have noticed how expensive the baskets of dried flowers were at the local florist, and so you made your own

baskets to decorate the event. Either way, you discovered you have a talent to sell—your ability to create centerpieces, to decorate a cake beautifully or to make charming and unique invitations. Some Event Planners are hired by clients for their retail services—to create invitations, party favors, centerpieces and so on. Or, they may combine their retail services with other aspects of planning.

Plan and Coordinate Services

This level of service is very similar to the comprehensive service offered by a Wedding Planner. Not only do you plan the event—advise and help make decisions on such things as décor, food and site; locate and contract with the vendors, wait staff, etc.—but you usually are on hand during the event to make sure that everything flows smoothly.

Fees

Your fees will be set according to the level of services you offer. As with wedding planning, you may choose to charge by the hour, set a price for the project as a whole after you've made a calculation of how many hours it will take or have your fee be a percentage of the overall budget for the project.



Even if you're making a few calls for a client, you should still charge a reasonable rate for your services.

You will learn about the ins and outs of setting fees in a later lesson, but one important point to remember is not to under-price your services. Even if you are only making a few phone calls to research caterers who serve vegetarian food, for example, you are still saving your client valuable time and effort. Beware of making the mistake of one beginning Event Planner: she had worked more than 40 hours helping to plan an event, but had set the fee at \$100.00—a pay rate of less than \$2.50 per hour!

Some of your callers will be simply exploring what an event planner can offer them and are not sure yet whether they want to hire someone. If this is the case, it doesn't necessarily mean you've wasted time talking with them. Take down the client's name and address, and then follow up their call with a brief letter thanking them for their interest. The letter can also include a sheet describing your services and fees, and possibly a small suggestion or idea you have for their particular event. This extra effort on your part might result in a second call from them—this time with the caller saying they'd really like you to be their Event Planner!

Expert Advice

Charge for Ideas

One suggestion is to tell the client there will be an initial fee for drawing up a design proposal for the event. As you tell the client about the fee, you can say, "Of course, if you choose to use my services to plan and coordinate the event, the design fee will be credited toward the overall cost of my services." This way, you protect yourself against giving ideas away for free.

Many callers will be sure they want an Event Planner after talking with you, and are ready for the next step in the process—the face-to-face meeting. Find out what would be a convenient time and place for them to meet you. While you may wish to invite them to your home, generally most clients prefer it if you come to them. It shows them that you are willing to “go the extra mile” to save them time and effort. Also, professional clients in particular prefer to meet at their place of business. Clients who are planning private social events, such as a child’s birthday party, usually appreciate it if you meet them at their homes, or you might suggest meeting at a coffee shop or restaurant near their home.



Most clients prefer if you can come to them to discuss the event.

If the meeting time is more than a day away, it’s useful to call and confirm the time and place. Remind the client of your fee for discussing a design and let him or her know of your cancellation fee. This will ensure that your time is not wasted going to see someone who has decided not to meet with you after all.

Face to Face—Meet with Clients for the First Time

Generally, you can start to identify the needs of your client through the initial phone conversation and begin to discuss your services and fees. It’s preferable to meet with the client in person soon after the first conversation. This gives you the chance to get a better sense of the vision your client has of the event and can evolve into a consulting and design-planning session once they’ve understood and accepted your services.

When you meet with a prospective client, bring a portfolio that highlights some of the past successes you’ve had with events. The portfolio shows you are experienced as an Event Planner. You can also use it to make suggestions for decorations or themes, and by paying attention to the materials the client seems to like best (or passes over quickly with a frown or no comment), you can gain a better sense of what they envision for their event.

The portfolio can include photos taken at past events, sample invitations, letters of recommendation, complimentary quotes from previous clients, write-ups from newspapers, etc. When you’re just starting out, you may use pictures from events you’ve volunteered on, your own family parties or even sketches of ideas you’d like to put into practice.

There is no need to include information on every event you've ever worked on. The portfolio should be tailored to the type of event your client described in his or her initial call. If the caller was interested in birthday parties, move those types of photos toward the front of the binder and be sure to include a letter from a previous client praising you for all the fun everyone had at little Ashley's party. Likewise, if you are meeting with a business client, be sure to include photos of corporate events similar to the one they are planning.

Do keep a few materials relating to social events in the back of the binder even when you are meeting with business clients, though. The marketing director who is meeting with you about planning a corporate retreat may also have a golden wedding anniversary coming up or a son about to graduate from college. When she sees that you also plan social occasions, you may find yourself helping her plan—and being paid for—two events rather than one!

Focus the Picture—Identify Your Client's Vision for the Event

After your phone conversation with the client, you should have a general picture of what type of event she is planning—whether it's a birthday party or a company holiday party. During the face-to-face interview, you need to fill more details into this picture. Now is the time to find out what the client hopes to accomplish by holding the event, whether she has a theme in mind for the event, who will be attending the event, where the event is to be held, etc.

Picture, Goals and Theme

The most important aspect of any Event Planning is making sure that all the different elements work together to achieve the client's purpose and goals for the event. One of the first questions you need to ask your client when you meet for the first time is what he or she wants to accomplish with the event.

Unlike weddings, where the goals are usually always the same, the kinds of events an Event Planner manages may have many different goals. Sometimes an event is held in celebration, like a wedding, to mark a special occasion. The purpose of a birthday party is to honor the birthday boy or girl and to give all the attendees a good time. Other times, particularly when working with business clients, the purpose might be educational, morale boosting or team building. A company may decide to hold a picnic not only for the pleasure of its employees, but also to build a stronger feeling of teamwork among different departments. Knowing what the client hopes will be the end result of the event will help you choose activities, decorations and entertainment all suited to that goal.

Expert Advice

Make a Portfolio

Your portfolio reflects who you are and communicates your style to a client. You may choose to use a simple binder with clear plastic pocket-type pages or a photo album with adhesive pages. These make effective portfolios as you can easily move the materials around and substitute other materials to match your client's particular event. Or you may use a more professional portfolio, which you can purchase at an art store. Either way, divide your portfolio into sections of different types of events so the client can get a good idea of what you do by flipping through.

It's also important to determine early on in your meeting what theme, if any, your client has in mind for the event. Remember that a theme is an overall idea an event is built around. It's often a particular setting or time period. Some themes might be pirates, western, Hawaiian, Arabian Nights, the Roaring Twenties or Star Wars. Or the theme may be as simple as a particular color scheme or look.

If your client has picked out a theme, all your suggestions and design plans must be tailored to that theme. Everything from the decorations to the food to the entertainment should fit the theme. Suggest serving star-shaped cookies at a “space” party, or have miniature treasure chests as centerpieces for a pirate-themed stockholders’ meeting.

Don't try to change your client's mind about the theme, even if you think you have a much better idea. Always remember, as with a wedding, it's the client's vision, not yours. Do make suggestions for new ways to approach the theme. It's a great chance to show off your creativity!

If your client hasn't picked out a theme yet and would like the event to have one, offer to come up with a few different themes and event designs to match those themes can be one of the services you provide your client. Always be sure, of course, that the client understands that the design proposal is not free. As you'll discover, a good design proposal can take time to prepare.



A theme, such as Roaring Twenties or Hawaiian, is an overall idea that the event is built around.

Discuss the Contract

The client should have a general idea of your services and fees from your initial phone conversation and from the follow-up letter you sent after the call. After you've identified the client's overall vision for the event, it's a good time to discuss where you fit into that vision. What does he or she want you to do to help achieve that goal? Discuss the different levels of your services again, making connections to the client's goals for the event. You might say, for example, “I can track down some entertainers who dress up as Star Wars characters, if you'd like, as part of my consulting service. Plus, that service would also cover the preparation of a list of suitable caterers and musicians.” When looking at your portfolio, the client may ask you how much an event like one they see there will cost. Eventually, the client will probably ask to be reminded how much you charge as an Event Planner and that can lead smoothly into a discussion of your contract.

It may be a bit awkward to bring up the subject of payment, but it's important that you don't wait until the end of the meeting to discuss your fees and a contract. You don't want to spend an hour or more making great suggestions for an event and then walk out the door without receiving payment for all your advice and ideas. So, before you begin discussing an event in too much detail, establish what you'll be doing to help the client out. Make a list of what areas he or she would like you to help with and agree on a price for each of those services. You might ask the client to initial the list when you have completed it. Or, you may have a contract with "fill in the blank" lines that you complete as you discuss your services with clients and then ask them to sign.

Step 5 Practice Exercise 3-1

For questions 1 through 5, choose the best answer from the choices provided.

1. **One difference between an Event Planner and a Wedding Planner is ____.**
 - a. Event Planners also work on business-related events and community events
 - b. Event Planners don't have to be as detail-oriented
 - c. Event Planners aren't in as much demand
 - d. Event Planners never offer just consulting services

2. **An Event Planner might help organize a ____.**
 - a. family reunion
 - b. fundraising event
 - c. retirement party
 - d. all of the above

3. **When talking with a client for the first time on the phone, you need to always ____.**
 - a. listen carefully and reflect back their ideas
 - b. offer lots of detailed suggestions for how to organize or decorate their event
 - c. tell them all about yourself
 - d. none of the above

4. **In the portfolio you show prospective clients, always include ____.**
 - a. a list of every event you've ever helped plan
 - b. photos from past events that are similar to the one the client is planning
 - c. letters of recommendation
 - d. both b and c

5. If your client wants a “theme” event, you need to make sure that _____ match/matches up with the theme.
- a. just the decorations
 - b. everything related to the event
 - c. the contract
 - d. none of the above

For questions 6 through 8, write your answers in the spaces provided.

6. In your own words, describe planning and coordinating services.

7. Your client has selected a Western theme for a company picnic. List three ideas that you can suggest to your client.

8. Describe how you could bring up the subject of payment when you meet with a client.

Step 6 Review Practice Exercise 3-1

- Compare your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 7 Important First Decisions for Your Client

- ❑ Once you have a contract in hand, you can begin to discuss specifics you haven't covered and generate more ideas for the event. There are several important decisions the client should be making. The client may already know exactly what she wants, or you may need to offer suggestions and guide her to the best plan based on your knowledge and expertise. Other issues may also come up as you talk, and your initial interview and contract meeting may quickly evolve into a full-blown design meeting. Or, you may have a second meeting later to fill in more details. You need to leave this first meeting having made decisions about the site, date, budget and who will attend.



Once you have a contract, you can discuss the event specifics.

Choose the Perfect Site



The client's first major decision is to choose the location for the event.

As with weddings, and for the same reasons, deciding on the location for the event is the very first major decision the client needs to make. Popular sites are often booked far in advance. Also, the location often determines many other factors of the event. The size of a banquet room might affect how you set up the tables for the award dinner, or if there is a spectacular view, you will want to make sure it's taken advantage of in your planning.

Many clients, especially those planning professional events such as training seminars, will already have a location in mind and may want to use a room in their office building. Or, parents may wish to hold their son's birthday party at their home or in their backyard.

If the client has a location already in mind, find out if he or she is set on the location since other questions, such as when the event will be held, will depend on the availability and nature of the site. This will let you know if your goal is to reserve the site, no matter what, or if the client is interested in the plan that makes all the elements work best together.

Match the Facilities to the Event

Other clients may want suggestions from you about possible facilities. Like a Wedding Planner, you will need to match the site to the event in terms of size—will it hold all the people expected to attend? You'll also want to consider issues such as parking or access to the special equipment needed for the event—a screen for an orientation film, for example.

In addition, Event Planners must also take into account the purpose of the event, the theme of the event and the image the client wants to convey through the event.

Be creative when suggesting possible locations for your client's event but be sure that the site matches the purpose for the gathering. If the purpose of the event is business-oriented, such as a training seminar by a visiting consultant, choose a site that won't be distracting to learning, such as a conference room at a local hotel. If you do choose a less conventional site, make sure to check noise level and availability of equipment before you book it.

Theme can also affect what locations you suggest. If you are working with a swashbuckling pirate theme, check to see if there's a nearby nautical restaurant or even a ship that can be rented for the occasion.

Particularly with business clients, you also want to be aware of the image the company wishes to project when you suggest a site. If the company wants to be seen as relaxed and fun, then an amusement park might be appropriate for the company picnic. If they wish to project a more sophisticated image, a winery would be more fitting.



If the client's company wants to be seen as easygoing and enjoyable, then a company event at an amusement park would be appropriate.

Visit the Facilities

It is essential that you visit the facility to see if it is suitable. This should be done as soon as possible in the planning process so that you do not get caught in a scheduling bind if you must change facilities.

“Please Attend Our Party on. . .”—When Will the Event Be?



The event's date is another important decision.

The next important decision for your client is when to hold the event. The event being planned may have a fixed date that cannot be changed, or there may be little room for flexibility. Winter holiday parties must be planned months in advance because everyone wants to hold these events in December. A Fourth of July picnic is another example. (Though in recent years many towns changed their annual celebration dates to accommodate the fact that the federal holiday fell on a Monday—so never rule anything out as a planner!)

Other clients may have more flexibility when choosing a date for their event. As when planning a wedding, discuss with your clients possible conflicts with dates they've chosen, such as national holidays or a particularly hot time of year for the location they've set their heart on. Sometimes a solution may involve a difference of only a day or two.

Priorities When the Date is Set

As you discuss dates, it's a good time to establish what your client views as a priority for the event. Is she most concerned about the location? Remind her that if she can be a bit flexible it may be easier to guarantee you can book a certain site. Or, is there a speaker that she feels is essential to the training seminar, one so in demand it is hard to find a time when he is free? Determining your client's priorities for the event not only helps you with setting a date, it can also help when you discuss the event budget.

Money Talks—The Budget

As an Event Planner, you generally won't have quite the same type of budget meeting that a Wedding Planner holds with her clients. Instead, the client will usually give you an overall “ballpark” figure he or she wishes to spend. Then, if you are helping to plan and coordinate the event, you will gather prices for the individual parts of the event as you prepare your design proposal. The budget is then determined in the proposal. If the event is social, the



Some clients prefer an overall budget, while others may prefer a line-by-line breakdown.

client may be more likely to want a breakdown of what would be spent on different elements. However, a business client, is more likely to tell you the amount to spend as a whole, and may not necessarily want a line-by-line breakdown.

Another difference from planning a wedding is that when working with corporate clients the budget may be initially more fixed than for social events. Managers often have to keep a close eye on the bottom line. Don't be surprised, however, if you work to keep within their budget and at the last minute they find new resources!

The Pleasure of Your Company—Who Will Attend?

This initial meeting is also the time to determine who will be attending the event and how many people the client expects to be there.

While some occasions may require invitations, others may be corporate events to be announced by internal memos, or events open to the public and announced by the media or advertising. Finding out who is expected to attend the event will determine the means of providing participants with information about the event.

You'll also need to know an estimate of how many people the client expects will attend the event in order to help you select everything from the location to the menu. The responsibility for determining how many people will come to the event is not yours, but your client's. You can offer advice on this subject but you don't want the liability of providing a figure that's wrong. For events that are open to the public, use your past experiences with similar gatherings, and the client's past experiences if they've held such an event before, to come up with a rough estimate. If neither of you had experience with this type of event before, don't guess! Crowd estimates at events such as concerts often vary wildly even when they come from people who have attended the event. Plan on doing some research to obtain accurate figures from similar events. For example, call to get ticket-sales figures from a concert promoter, do some research on the Internet or ask someone experienced with planning a similar event in the past to help you.

Work with a Committee

Generally, when planning a wedding, you work with the bride, groom and/or with the parents of the couple being married. Similarly, when acting as an Event Planner for social occasions, it is usually the celebrants, or family or friends of the celebrants, you meet and work with on the plan.



When you work with a committee, make sure you know who makes the final decisions.

When working with corporate clients, you may work with several different people on a planning committee. It's important to determine in the contract who will be the person responsible for final decisions. The committee can include a number of staff or members of the organization that has hired you—for example, or marketing directors, facilities managers, office managers and so on. Or there may just be one person or a few people for you deal with. Again, it's important to discuss in your initial meeting with any client, but especially with business clients, who you will be working with and who is your main contact. Then determine the responsibilities of each person and how much they'll be involved.

Event Checklist

After you discuss these important first decisions with your client, you will want to make up an event checklist that you can consult after the meeting to remind you of the plans you made for the event. Use this checklist as a “To Do List” to help you design a plan for the event. The checklist should be tailored to the specific event being discussed.

The following is a general sample checklist of tasks that will apply to almost any kind of event. When you first start out, you may use it as a guideline to take you through the planning process. Once each task has been taken care of, you can check it off your list. Remember, though, that it is best to come up with a new checklist for each event you do, as every event is unique. Some Event Planners include times and dates by which certain tasks need to be accomplished, while others simply use a prioritized list. Be aware that as the planning progresses, your checklist may need to be revised.



Event Planning Checklist

Complete design form: _____

Agree on who does what: _____

Put responsibilities in writing: _____

Determine the services needed: _____

Complete shopping list: _____

Purchase, prepare, mail invitations: _____

Sponsors: _____

Organize publicity and promotion: _____

Investigate outside services: _____

Secure outside service contracts: _____

Shop for decorations and supplies: _____

Shop for menu ingredients: _____

Prepare menu items ahead of time: _____

Follow up on service contracts: _____

Follow up on who does what: _____

Pack supplies: _____

Miscellaneous: _____

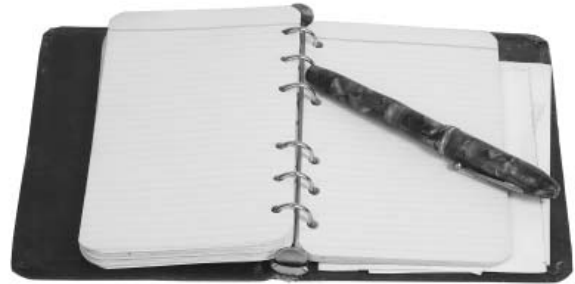
Set up: _____

Tear down: _____

Follow up: _____

Step 8 Let's Get Organized— Your Event-planning Notebook

After you have gathered information on the basics about your client's event, you can begin to organize to further plan the event. You'll need to gather more information and come up with an overall design for the event. An event-planning notebook is a great tool to use while planning events because it compiles in one place all the phone numbers, names, contracts and everything else associated with a particular event, and also gives you a place to make notes regarding your design for the event. Also, if you are planning more than one event, separate event-planning notebooks will help keep you from confusing details about each event. Besides phone numbers, names and contracts, an event-planning notebook contains event-planning lists. These are forms that let you fill in the appropriate information for each event, and are very useful in helping you organize everything at a glance.



An event-planning notebook is a great tool to use while planning events because it compiles in one place all the phone numbers, names, contracts and the details of the event.

Another useful organizational tool is an electronic organizer. This also will allow you to store contact information, and will also allow you to call and e-mail clients on the go.

The Event-design List

The event-design list will be your main resource in the early stages of planning the event. The following example contains all the necessary information that you will get from your client during initial consultations. This list will help you ask all the pertinent questions, ensure that you don't forget something important and help you organize the details of the event before you begin to plan the smaller details. As with the other lists, the event-design list can be customized for each event depending on your particular needs for the event.

An event-design list is included in your student forms pack. Following is an example of how it could be filled in for a child's birthday party:

Event Design List

Occasion: 10th Birthday Party for Kate Carson

Theme: The Little Mermaid

Tone/Purpose: To celebrate and have great fun—come in costume!

Explanation: Kate loves *The Little Mermaid* and wants to have a dress-up party

Host(s): Angela Carson (mom)

Guest of honor: Kate

Speaker or special guest: Local storyteller

Projected number of guests: 20 adults and kids

Budget: \$500

Ticket price: N/A

Sponsors: N/A

Invitation design: Little Mermaid party invitations

Invitations sent?: Yes

Directions to site included in invitations?: (X) yes () no

Number of RSVP's returned?: 10

Site information: Carsons' backyard

Decorations: Underwater theme—fish, coral, seashells

Committee chairperson: N/A

Committees: N/A

Committee members:	Phone #'s:
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N/A	
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Promotion/Advertising: N/A

As you can see, this form contains all of the important details for a particular event, so that when you fill it out, you will be able to see everything at one glance. There are lists that are more detailed for decorations, invitations and guests, but the previous form brings everything together after the second or third consultation and later follow ups. It may be helpful to staple it to contract forms, sponsor lists or anything else necessary to your initial planning phase.

The Invitation-planning List

The invitation-planning list will help you organize and plan everything necessary for the event invitations. It helps with the design, the materials you'll need, the committees or volunteers you've recruited to help with the invitations and other pertinent information you'll need to include on the invitations or as enclosures, such as maps or complimentary tickets for sponsors or other special guests. On the following page is one example to help you get started.

Invitation Planning List	
Event:	<u>Fundraiser for Neighborhood Homeowner's Association</u>
Date, time, location:	<u>September 15, 2000</u>
Number of guests:	<u>200?</u>
RSVP Tel. # (s):	<u>Bob Benson, President—555-1111</u>
Design:	<u>Invitation in the shape of a house</u>
Invitation materials:	<u>paper "key" with lines for names</u>
Invitation committee:	<u>Bob Benson, Mariah Findley, Kathy Peters</u>
Invitation committee meeting date, time, and place:	<u>Kathy's house</u>
	<u>Friday, August 3, 8 p.m.</u>
Activity information guests should expect:	<u>Raffle of a yard storage unit</u>
Meal guests should expect (brunch, dinner, etc.):	<u>BBQ snacks</u>
Dress guests should wear (casual, formal, active wear, etc.):	<u>Casual</u>
Special instructions to guests:	<u>Bring key, money for more raffle keys and</u>
	<u>household items to donate to raffle</u>
Directions to site (included as a map or written instructions in invitations):	<u>_____</u>
	<u>_____</u>

Guest List

You will also need to make a guest list that includes names, phone numbers and RSVP responses you receive. The guest list will help you plan for decorating the site, amount of food for catering and the kinds of activities you should plan for the event. As you can see on the following page, you can also use a checkmark for guests who have special needs, such as wheelchair access or assistance getting to the event, etc. You can customize the guest list for each event, depending on the size and type of event.

Guest List		
Name (write a checkmark if guest has special needs)	Phone #	RSVP (yes, no)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The above guest list is just a sample of what you might offer to your clients when they are filing out their guest list.

Step 9 Practice Exercise 3-2

For questions 1 through 10, choose the best answer from the choices provided.

1. **The first decision a client should make when planning an event is ____.**
 - a. what kind of food to serve
 - b. what music should be playing
 - c. where to hold the event
 - d. how many people will be attending

2. **When discussing location with a client, important considerations are the ____.**
 - a. purpose of the event
 - b. image the client wishes to project
 - c. theme of the event
 - d. all of the above

- 3. You should visit the possible facilities ____.**
 - a. as soon as possible in the planning process
 - b. in order to make sure the site is suitable for the event
 - c. just before the event takes place
 - d. both a and b

- 4. One example of an event that may not allow much flexibility when choosing a date is a ____.**
 - a. corporate retreat
 - b. retirement party
 - c. holiday party
 - d. fundraising concert

- 5. The responsibility for determining how many people will come to the event is ____.**
 - a. yours
 - b. the caterer's
 - c. not yours, but your client's
 - d. none of the above

- 6. An event-planning notebook is a great tool to use while planning events because it ____ all the names, phone numbers, contracts and everything else associated with a particular event.**
 - a. duplicates
 - b. lists alphabetically
 - c. compiles in one place
 - d. none of the above

- 7. Besides names, phone numbers and contracts, the event-planning notebook contains ____.**
 - a. the Event Planner's salary information
 - b. the Event Planner's resume
 - c. event-planning lists
 - d. all of the above

- 8. The ____ will be your main reference for the early stages of planning the event.**
 - a. event-design list
 - b. sponsor contract
 - c. catering contract
 - d. entertainment list

9. The guest list will help you plan for ____.
- decorating the site
 - the amount of food for catering
 - the kinds of activities you should plan for the event
 - all of the above
10. You can customize the guest list for each event, depending on ____.
- the size and type of event
 - whether certain people can come
 - who is sponsoring your event
 - none of the above

Step 10 Review Practice Exercise 3-2

- Compare your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 11 Lesson Summary

- In this lesson, you've learned some very important information. You've learned there is a wide variety of events you might organize as an Event Planner. You now know that the way you handle the initial call you receive from a prospective client can help create a favorable impression, and what types of questions to ask during that call. You've learned how to match your services to a client's needs, how to explain your services and what to do to follow up that first phone call.

You also know how to handle the first face-to-face meeting with a client, how to identify the client's purpose, goals and themes. You've learned to confirm the level of services the client is interested in early on in the meeting and to have an agreement or contract before you offer many specific ideas or details.

The important decisions your client will need to make are familiar to you now, too: location, date, budget, who and how many will attend the event and who you will be working with as you help plan the event. You've seen samples of event checklists, which will help you confirm the details of your meeting before you leave it and remind you of the specifics of your clients' decisions. You now know the first steps every Event Planner must take as she begins to work with a new client. Lastly, you've also seen examples of forms that help you plan each event in more detail, and you are well on your way to being able to design events tailored to your clients' needs.

Step 12 Mail-in Quiz 3

- Follow the steps to complete the quiz.
 - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
 - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
 - c. When you've finished, transfer your answers to the Scanner Answer Sheet included. Use only blue or black ink on your Scanner Answer Sheet.
 - d. **Important!** Please fill in all information requested on your Scanner Answer Sheet or when submitting your quiz online.
 - e. Submit your answers to the school via mail, e-mail, fax or, to receive your grade immediately, submit your answers online at www.uscareerinstitute.edu.

Mail-in Quiz 3

For questions 1 through 20, choose the best answers from the choices provided.

1. **A Wedding Planner and Event Planner will need to be _____.**
 - a. diplomatic
 - b. a good communicator
 - c. a creative thinker
 - d. all of the above

2. **An Event Planner may choose to divide services in which of the following ways? _____**
 - a. Consultation only
 - b. Retail services
 - c. Planning and coordinating
 - d. All of the above

3. **Some issues an Event Planner may have to help with that a Wedding Planner would not are _____.**
 - a. finding entertainment for the event
 - b. deciding how much to charge for tickets and how to collect ticket fees
 - c. identifying the client's vision for the event
 - d. locating a caterer for the event

4. **Some community events that an Event Planner might help organize include ____.**
 - a. seasonal events like a winter carnival
 - b. fundraising events
 - c. a free concert series
 - d. all of the above

5. **To make a favorable impression during the initial phone call with a prospective client, you need to ____.**
 - a. be very chatty
 - b. not ask questions
 - c. hit a mix of enthusiasm and professionalism
 - d. none of the above

6. **Some important questions to ask during the first phone call are what ____.**
 - a. type of event the client is planning
 - b. food they want to serve
 - c. steps have they already taken toward planning the events
 - d. both a and c

7. **If a caller wants a quick suggestion for a vendor or party game, you should ____.**
 - a. tell him you never give out any information without being paid for it
 - b. tell him you need to do research
 - c. share an idea off the top of your head
 - d. none of the above

8. **If you offer retail services to a client, you might ____.**
 - a. create centerpieces
 - b. decorate their banquet hall
 - c. make invitations to the event
 - d. all of the above

9. **Most clients prefer to meet ____.**
 - a. in their offices
 - b. at your home
 - c. in their homes
 - d. both a and c

- 10. _____ can give you clues to what they want for their event.**
- Discussing events the client enjoyed or thought were successful in the past
 - Talking about what they didn't like about past events
 - Both a and b
 - None of the above
- 11. A portfolio can help you _____.**
- highlight past successes you've had with events
 - suggest some possibilities for decorations or themes
 - get a better sense of the kind of event the client envisions
 - all of the above
- 12. It's important for a client to decide on location first because _____.**
- many places are booked far in advance
 - many of the other decisions are affected by where the event is held
 - it's the most fun thing to discuss
 - both a and b
- 13. After discussing the budget at the initial meeting with a client, you should walk away with _____.**
- an exact dollar amount to spend for each aspect of the event
 - an overall ballpark figure
 - the costs for location and food only
 - none of the above
- 14. When trying to decide how many people will attend a public event you might _____.**
- use your past experiences with similar gatherings
 - use the client's past experiences with similar events
 - research to obtain accurate figures from similar events
 - all of the above
- 15. _____ will determine the means of providing participants with information about the event.**
- Determining the location
 - The budget
 - Finding out who is expected to attend the event
 - All of the above

- 16. Some possible members of an event planning committee are a/an ____.**
- a. marketing director
 - b. facilities manager
 - c. office manager
 - d. all of the above
- 17. While some occasions you handle as an Event Planner may require invitations, as a wedding does, others may be events open to the public and announced by ____.**
- a. internal memo
 - b. the media or advertising
 - c. letter
 - d. none of the above
- 18. Which of the following items might appear on an event-planning checklist? ____**
- a. Organize publicity and promotion
 - b. Complete shopping list
 - c. Purchase, prepare, mail invitations
 - d. All of the above
- 19. An event-planning checklist should be ____.**
- a. completed after the event
 - b. shown to the client to make sure you haven't missed anything
 - c. tailored for the specific event
 - d. both b and c
- 20. The most important aspect of event planning is making sure that ____.**
- a. all the different elements work together to achieve the client's purpose and goals for the event
 - b. you are not responsible for doing everything
 - c. you do everything perfectly
 - d. none of the above

CONGRATULATIONS

You've completed
Lesson 3.



Don't wait for your quiz results to continue with Lesson 4.

Manage Your Client's Resources

4

Step 1 Learning Objectives for Lesson 4

- ❑ When you have completed the instruction in this lesson, you will be trained to do the following:
 - ❖ Help your client determine a budget and list the elements of any wedding and event budget.
 - ❖ Identify who traditionally pays for what and recognize modern arrangements for dividing costs.
 - ❖ Describe how to work with vendors to get the best prices for your client.
 - ❖ Find creative ways to cut costs for your client.
 - ❖ Ensure that your professional services are valued.

Step 2 Lesson Preview

- ❑ The next two weekends, you will attend two weddings you've helped plan as a Wedding Planner. The first wedding is a small affair. The ceremony will take place on Saturday morning at the couple's favorite picnic spot, near a lake. The ceremony site is naturally beautiful, so the bride has decided she doesn't need elaborate flower arrangements. The groom has decided he'll be more comfortable in a nice, gray suit rather than a tuxedo, and the bride will wear a simple, tea-length dress she found in a department store. After the ceremony, all of the bride's and groom's close friends and immediate family will enjoy a day-long barbecue, where the bride and groom will have plenty of time to catch up with family and enjoy the company of old friends. The bride and groom are paying for this wedding on their own and have kept expenses to \$3,500.

The second wedding is a glamorous evening celebration. The couple both love the theater, and the bride and groom dreamed of an elaborate theme wedding that would let them share their love of costume and fanfare with friends. The bride will wear a post-Civil War gown, which she had custom-designed using old photographs. The groom's suit is also custom-tailored, and the couple will be married on a restored riverboat. Guests have been encouraged to come in costume and will be treated to an evening aboard the boat with fine food, a host bar and a complete Dixieland band. Both the bride's and the groom's families are helping the couple pay for this wedding, which will cost about \$50,000.

What do these two weddings have in common? Although one is a small, intimate gathering and the other a large, formal affair, both weddings are successful due to your expert budgeting advice. In each case, you helped the clients determine what was most important to them—an all-day gathering of close friends in the first case, an elaborate theme in the second—and allowed for those elements in the budget.



You've helped your clients plan an elaborate theme wedding on a riverboat.

Budgeting is essential whether your client is a bride or a business owner planning a party. So in this lesson, you'll learn to manage your client's money for a wedding or an event. In addition, you'll learn how to ease your clients through the sometimes tricky but important process of budgeting. You'll learn about what costs your clients need to consider, who pays for what, how to get the best prices and how to make sure clients value your services.

Step 3 Help Your Clientele Determine a Budget

- ❑ Carolyn and Jeff are a young, professional couple who have hired you to help make their wedding day special. They know that long before they will actually cut the cake at their reception, their resources must be carefully allocated. Both bride and groom are a little nervous about how much their wedding might cost, how they're going to keep track of all the expenses and how they'll arrange the wedding they've dreamed of. That's where you come in! At one of your first meetings with Carolyn and Jeff—or any clients—you'll first spend some time discussing what is most important to them and finding out their expectations about costs.

Before you talk to clients about specific budget items, it's a good idea to ask them what they most want to remember about their event, a ballpark figure of what they want to spend and who else will be involved in financing the wedding or event.

You begin by asking Carolyn and Jeff what they most want to remember about their wedding. What will they remember on their 25th wedding anniversary, for example? Like a lot of couples, Carolyn and Jeff have trouble coming up with anything—they just say they want “everything to be perfect.” So you offer some suggestions. Will they remember the dress? The cake? The photos? Do they have a special location in mind? Will it be most important to them that all of their friends and family were able to attend? Have they always dreamed of hearing a particular kind of music as they walk down the aisle or dance the first dance?

Next, you ask about the level of formality they have in mind. You might ask them, “Do you want something very simple or very elaborate? Something in-between?” You explain that the formality of a wedding or event determines a lot, so deciding this early will help them focus on what’s most important. It will also help you help them establish a realistic budget. If your clients have a realistic budget from the start, it will reduce tensions later. After you’ve planned a few weddings, you’ll be able to draw on your experience to paint some mental pictures for clients. When you’re just starting out in your planning business, you can refer to your own wedding or to those of friends or family members as examples.



Ask your clients what they want to remember on their 25th wedding anniversary to determine the elements that are most important to them.

After you’ve talked about what kind of wedding your clients want, you can discuss some of the details that can help determine the wedding budget. For example, you can ask your clients about their priorities in order to provide them with the costs in your area. Is the number of people attending the event or wedding the highest priority? Perhaps the style of the wedding is more important, a couture gown or the decorations are top priorities. Feel free to use examples from your event portfolio to show your client the varying prices for weddings and events. This will help set what the client expects to spend.

Since Carolyn and Jeff are just starting their careers, they don’t feel they have enough money saved for the wedding they envision. At this point, you ask them to explore who else might be involved in financing the wedding. You may want to ask if anyone else has offered to help. Sometimes the groom’s family offers to pay for certain elements of the wedding budget, or other family members (such as aunts, uncles or grandparents) may wish to help. Encourage your clients to consider this when setting their budgets. We’ll talk more about how to help your clients decide who pays for what later in this lesson.

When you discuss budgets, feel free to mention that simple can be beautiful, too. Some brides feel like they have a list of elements they must include in their wedding. As a result, the bride feels she must budget to fit it all. In the end, the wedding would’ve looked better if more money was spent on fewer elements.

Most often, your main client for weddings will be the bride—or, if the wedding is quite traditional, the mother of the bride—and you will make your contract with her. If more than one person or family wants to help pay for the wedding, your contract needs to specify who is the final decision-maker. If more than one person insists on being involved, those people may be asked to participate in budget discussions from the beginning. Find out from your client what kind of relationship the various parties have and how much control each person wants or expects. Although this can be a delicate matter, it’s best to get these issues out in the open from the beginning rather than be surprised later! If others do get involved in the planning, it is important that the family decides on one person who is the final decision maker. It’s best if this person is the bride.

For events, you'll also need to create a contract for your clients and determine the amount of control that each person has. For example, if your client is planning a surprise 60th birthday party for her husband, she controls the event decisions. However, if you're working with several clients to plan an event, confirm who is the final decision maker.

Keep in mind that you will have one or two budget meetings at the beginning of the wedding planning process. Early on, you'll help the couple come up with a "bottom line" figure, with the understanding that what they spend on individual items will change as you "borrow" from the amount they've set aside for one item to help pay for another. Remember, you are not a financial consultant. However, you are an expert on wedding and event costs, which can help your clients, such as Carolyn and Jeff, stay within the budget they've set. Once they decide on the total amount of their budget, it's your job to help them keep within that budget. But a budget is never 100% firm. As you continue the planning process and show them options on everything from decorations to music, your clients may choose to spend more or less on individual items—it's not your role to monitor everything they spend!

Elements of Any Budget

Now that you have a better idea of what's important to Carolyn and Jeff, and you have a general idea of how elaborate a wedding they want, you can start to discuss specific items they'll want to consider. Because you've attended weddings in the past, you can think of many things that need to be included in a wedding budget. You probably already know more than you think about what to consider when making up a budget.

You also can discuss ways to pay for the wedding. Some recommend using credit cards with reward programs, such as airplane miles. Perhaps your client can redeem these miles for plane tickets for the honeymoon. In addition to earning rewards, your clients will have the security of credit card protection.

Start by making your own list of anything you can think of that Carolyn and Jeff should include in their wedding budget. You might start with the basics. Of course, they will get rings. The bride will need a dress. And food of some sort is usually served at the reception. Try dividing your list into pre-wedding costs, ceremony costs, reception costs and honeymoon costs. See how many items you can come up with before looking at the list we've provided. Take as much time as you like!



If clients use credit cards to pay for their wedding, they can earn rewards and receive credit card protection.

Wedding Budget	
1.	Wedding rings _____
2.	Wedding dress _____
3.	Caterer/food _____
4.	_____
5.	_____
6.	_____
7.	_____
8.	_____
9.	_____
10.	_____
11.	_____
12.	_____
13.	_____
14.	_____
15.	_____

If you came up with even ten items, you're off to a great start! Now take a look at our list, which is also a form you can use in your business, and see how many of these things you were able to think of on your own.

Wedding Budget					
Vendor/Service	Bride/ Groom	Bride's Family	Groom's Family	Other	Total
Pre-Wedding					
Consultant					
Marriage license/blood tests					
Engagement & wedding rings					
Invitations					
Announcements					
Thank-you notes					
Postage					
Attendant gifts					
Legal fees					
Estate or tax planning					
Wills					
Preuptial agreement					
Pre-Wedding Subtotal					
Ceremony					
Site rental					
Officiant's fee					
Bride's attire					
Dress					
Headpiece					
Accessories (shoes, veil, jewelry, garter, lingerie, etc.)					
Alterations					
Hair stylist/makeup artist					
Groom's attire					
Bride's attendants					
Groom's attendants					
Floral					
Bride's bouquet					
Bridesmaids					
Flower girl					
Ring bearer					
Corsages #					
Boutonnieres #					
Altar					
Aisle/pew					

Wedding Budget					
Vendor/Service	Bride/ Groom	Bride's Family	Groom's Family	Other	Total
Other site					
Site rentals					
Programs/napkins					
Canopy, arch					
Candles, aisle					
Carpet & other					
Other site décor					
Music					
Photography/videography					
Guest book/favors					
Ceremony Subtotal					
Reception					
Site rental					
Table décor					
Rentals (chairs, lighting, dishes, flatware, etc.)					
Linens					
Centerpieces					
Place settings					
Décor (favors)					
Room décor					
Food/caterer					
Bar/beverages					
Cake (knife, napkins)					
Favors					
Champagne (toasting glasses, napkins, etc.)					
Music/Entertainment					
Photography/videography					
Transportation (limousines, etc.)					
Reception Subtotal					
Pre-Wedding Total					
Ceremony Total					
Reception Total					
Grand Total					

If your services cover pre-wedding parties and honeymoon planning, you would also include lines for those costs in your budget form. Otherwise, these items are usually considered separately. Also, some planners choose not to include a line for their fee, keeping the discussion of their fee separate from the wedding-budget discussion.

As you can see, when you create a budget, there’s a lot to think about! You can see why Carolyn and Jeff will be grateful for your experience and advice. Once you’ve done a few weddings, you’ll have a general idea of what each item costs before you even start talking to vendors. This will help relieve some of the couple’s fears while giving them a realistic picture of what the wedding they want will cost. You will also be able to help your clients make adjustments along the way and still get the wedding they’ve dreamed of.

Many of the elements in a wedding budget are also included in an event budget. Take a look at the following list for event budgets.

Event Budget	
Vendor/Service	
Invitations	
Thank-you notes	
Postage	
Programs	
Site rental	
Table décor	
Rentals (chairs, lighting, dishes, flatware, etc.)	
Linens	
Centerpieces	
Place settings	
Room décor	
Food/caterer	
Bar/beverages	
Knife	
Favors	
Napkins	
Napkins, etc.	
Music	
Entertainment	
Photography/videography	
Transportation (limousines, etc.)	
Grand Total	

Again, remember to advise your clients to be flexible about individual budget items, while you reassure them that you will keep in mind their “bottom line” figure. The client’s vision should be the first priority and the budget should be done later. This will avoid getting locked into a budget that doesn’t fit what the couple wants. For example, a bride may find a dress that she absolutely has to have and decide to serve chicken instead of steak at the reception in order to cover the cost. Once you’ve had a general conversation about the budget with your client, you can begin checking with vendors and doing some actual pricing. Budgeting is a process of give and take, and expecting the unexpected. The more you can convey this to a client, the better.

Expert Advice

When you’re just starting out, ask people you know who’ve had a wedding recently and are willing to talk with you about which vendors they used, whether they were satisfied and how much they spent. This will give you a good idea of how much people spend on weddings in your area.

Step 4 Pay the Bills

- ❑ The question of who pays for what will arise with wedding planning more than event planning. In this section, you’ll learn who traditionally pays for certain wedding elements and you’ll discover some creative ideas for dividing wedding costs.

Who Pays for What

After Carolyn and Jeff realize how much the wedding they want is going to cost, they decide they will need to accept their parents’ help. They turn to you for advice:

“Who should pay for which items?” Carolyn asks you, looking concerned. “I don’t want to start my marriage with a family feud!” Carolyn explains that her parents are eager to help pay, but because they are still putting Carolyn’s two younger sisters through college, they hope Carolyn and Jeff will have a small wedding.

Jeff adds that his father, an attorney, wants them to have a large wedding so that he can invite all of his colleagues and work acquaintances. He has suggested that he’d like to help pay, but he doesn’t want to offend Carolyn’s parents by implying they don’t make as much money as he does.

You are eager to ease all of these concerns. What do you say?

Traditional Arrangements

Although many modern arrangements now exist for covering wedding expenses, most couples will want to be informed about tradition before they make a decision for their own situation. As a planner, you will be a resource for traditional etiquette. Traditionally, expenses are split among the bride, the groom and their families, as you can see on the following page.

Bride

- ❖ Groom's wedding ring
- ❖ Groom's wedding gift
- ❖ Bridal attendants' gifts
- ❖ Personal stationery
- ❖ Medical exam and blood test (if required)
- ❖ Accommodations for out-of-town attendants

Groom

- ❖ Bride's rings (engagement and wedding)
- ❖ Bride's wedding gift
- ❖ Gifts for the best man and ushers
- ❖ Bride's bouquet
- ❖ Mothers' corsages
- ❖ Boutonnieres for attendants and fathers
- ❖ Medical exam and blood test (if required)
- ❖ Marriage license
- ❖ Officiant's fee
- ❖ Honeymoon
- ❖ Accommodations for out-of-town ushers

Bride's Family

- ❖ Ceremony costs—location, music, rentals, etc.
- ❖ Reception costs—food, beverages, music, rentals, decorations, cake
- ❖ Bride's wedding attire and accessories
- ❖ Wedding invitations and postage
- ❖ Bridesmaids' bouquets
- ❖ Transportation for the bridal party
- ❖ Bridesmaids' luncheon
- ❖ Photography
- ❖ Floral decorations

Groom's Family

- ❖ Rehearsal dinner
- ❖ Wedding night suite

Attendants who participate in the wedding traditionally pay for their own attire (except for flowers) and travel expenses. Sometimes, however, the bride or her family opt to pay for the bridal attendants' dresses. Attendants also frequently pay for a shower, bachelorette party (bride's attendants) and bachelor party (best man or ushers).

Other variations: The bride's family may choose to purchase her bouquet. The bride may opt to pay for her own mother's and grandmothers' corsages. The bride's family or a close family friend may host the rehearsal dinner.

New Ways to Divide Expenses

After you explain the traditional arrangement, you reassure Carolyn and Jeff that today's etiquette says expenses can be divided more flexibly, to allow for different financial situations and family structures. In other words, there are as many creative ways to split expenses as there are unique wedding couples!

Here are just some of the ways to divide expenses that you can tell your clients about:

Bride and groom pay for the entire wedding. Many couples—especially older couples—decide to pay for their wedding themselves. Some second marriages also pay for their weddings.

Expenses are shared by all. Another alternative for older, more established couples is to split the entire cost of the wedding (all of the elements listed in previous sections) into thirds—the bride and groom pay one-third, her family pays a third and his family pays the final third. This arrangement may work well if the families share similar income levels and expectations for the wedding.

Expenses are split between the bride and groom's families. In this arrangement, expenses that are traditionally paid by either family are pooled and then split evenly between the two families. The bride and groom still pay their own expenses (as listed previously).

Each family pays for their own guests. This arrangement helps minimize awkward feelings about the guest list. Sometimes one family has a much larger group of friends and family members that they wish to invite, while the other family may want to keep the guest list small to minimize costs. In this case, the families might add together all of the expenses for the ceremony and reception and divide it by the expected number of guests. Each family (and the bride and groom) then pays that per-guest cost for each person they wish to include.



You can inform your clients about creative ways to divide wedding expenses.

Groom's family pays for the entire wedding. This is not common, but it's certainly not an unheard of arrangement. This may be an appropriate option if it is the bride's second marriage and the groom's first, if the bride's family is deceased or if there is a large disparity in income level between the two families.

As you can see, there are plenty of ways to divide wedding expenses. After you describe several options, encourage your clients to pick the option they are most comfortable with. Remember Carolyn and Jeff's situation, where one family was able to afford more and wanted a larger wedding than the other? With guidance from you, their Wedding Planner, they decided to talk to their parents about the possibility of each family paying for their own guests. Whoever your clients are, and whatever their unique situation, before they leave, you'll want to remind them of these important pointers for involving other family members:

- ❖ If the groom's family will be asked to help, the groom should be the one to approach his parents. (While we know the rules have changed, some families may still not realize it's becoming more acceptable for the groom's family to participate.)
- ❖ The bride's parents should make the final decision of whether or not to accept the groom's family's offer to help with expenses. (The couple can decide this if they are hosting their own wedding.)
- ❖ Whoever is involved in paying for the wedding might like to be included on the wedding invitation and may want to be involved in planning. (If the parents are hosting, their names should definitely be on the invitations.) Still, your contract needs to specify who the final decision-maker will be.

You'll remember that Carolyn and Jeff were a little nervous when they first came to see you. By now they feel much more comfortable and relaxed about financing their wedding. The couple has decided what is important to them and how formal they'd like their wedding celebration to be. With your help, they've started to make a sample budget and have determined a ballpark figure of what they can expect to spend. They've discussed who will be involved in financing the wedding and different ways they might divide the wedding expenses.

Now that you're familiar with budgets and some strategies to pay for weddings, let's apply what you've learned.

Step 5 Practice Exercise 4-1

□ For questions 1 through 5, choose the best answer from the choices provided.

- 1. Before you talk to clients about specific budget items, it's a good idea to ask them ____.**
 - a. what they most want to remember about their special day
 - b. the level of formality they have in mind
 - c. who else might be involved in financing the wedding
 - d. all of the above

- 2. If others do get involved in the wedding budget planning, ____.**
 - a. it is important that the family decides on one person who is the final decision maker
 - b. those people may be asked to participate in budget decisions from the beginning
 - c. it's best if the final decision-maker is the bride
 - d. all of the above

- 3. The groom's family traditionally pays for the ____.**
 - a. ceremony costs
 - b. reception costs
 - c. rehearsal dinner
 - d. all of the above

- 4. Today's etiquette says ____.**
 - a. the bride and groom's families should split all costs equally
 - b. each family should pay for their own guests
 - c. the bride and groom should finance the wedding on their own
 - d. expenses can be divided more flexibly, to allow for different financial situations and family structures

- 5. When involving the groom's family in financing a wedding, the ____ should be the one to approach them about helping.**
 - a. groom
 - b. bride
 - c. Wedding Planner
 - d. bride's family

For questions 6 through 8, write your answers in the provided spaces.

6. List three creative ways to divide wedding expenses.

7. List two items that the groom's is traditionally responsible for.

8. Today you met with two new clients. As you began discussing the couple's vision for their wedding, they brought up some budget concerns. The couple is just starting out, and don't have money for an extravagant wedding. The groom's family has a substantial income and the bride's family is deceased. You discovered that this is the bride's second marriage and the groom's first wedding. What suggestions do you have to divide the wedding expenses?

Step 6 Review Practice Exercise 4-1

- Compare your answers to the Answer Key at the end of this instruction pack. Correct any mistakes you may have made.

Step 7 Event Budget Elements

While the same budget concepts apply to both weddings and events, event budgets include some unique elements. For example, in addition to location, food, beverages and decorations costs, you also may need entertainment, tickets, printed programs, awards or prizes.

As you do with wedding clients, make sure your client has an initial ballpark budget in mind. This will help you and your client determine elements of your event. For example, if your client's company has a tight budget for a product release party, then a five-course, plated dinner may not be realistic.



Events can vary, so some may be low-budget gatherings while others may be extravagant affairs with complex budgets.

Take a look at the following list of potential costs for an event. Keep in mind that you will rarely have all of these costs at an event. Also, event sites might take care of some of these details, so check with your event site manager.

Event Site/Facility

Rental fee

Permit(s)/License

Rentals

Heat/Air

Furniture

Tables

Registration tables

Chairs

Carpeting/Flooring

Props

Tents/Canopies

Staging (skirting, stairs)

Risers

Stanchions/Ropes

Food Services

Food

Beverages

Bartender fees

Catering fees

Equipment

Tables/Chairs

Supplies (linens, china)

Glasses, utensils

Labor/Staff

Gratuities

Health permits

Personnel/VIP/Guests/
Volunteers

Audio-Visual

Television monitors

Video Players/Recorders

Cameras

Projectors/Carts

Screens

Lecterns/Podiums

Microphones

Disc players

Sound system

Walkie-Talkies

Pointers/Marking pens

Flip Charts

Blackboards

Computer interfaces

Technical staff

Continued—

Electrical

General lighting
Special lighting
Generator
Extension cords
Video production
Other rentals

Decorations

Event decor
Stage decor
Stage backdrop
Centerpieces/Table decor
Flowers/Plants
Candles
Balloons
Specialty linen
Chair covers
Signs
Props
Paper supplies

Entertainment

Music
Talent
Celebrity
Speaker's fees
Models

Utilities/Waste Management

Water hookup
Restrooms/portable restrooms
Trash/dumpsters
Receptacles
Disposal service
Setup crew
Cleanup crew

Promotion/Advertising

Newspapers
Magazines
Radio
TV
Show signs
Street signs
Directional signs
Banners
Printed photos
Promotional items
Radio/TV/Video production

Security

Facility
Private

Insurance

Gen. liability Insurance

Continued—

Design and Printing

Designer
Business cards
Brochures
Media kit
Registration packets
Posters
Flyers
Invitations
Tickets
Letterhead/Envelopes
Duplicating/Photocopies
Logo
Program

**Misc. Printing/
Specialties**

Menus
Maps
Sponsor signs
Special area
VIP area
Name Tags/holders
Place cards
Awards, recognitions
Engraving
Certificates
Prizes
Frames
Thank you cards

Transportation/Parking

Limousine/Car rental
Valet Area
Shuttle

On-site Transportation

Truck/Van rental
Carts/Hand trucks
Special vehicles

**Travel/
Accommodations**

VIP travel
Limousine/Car rental
Hotel
Staff travel
Limousine/Car rental



As you can see, events have some costs that aren't needed for weddings. When you meet with your client, see if they require any of this list for their event. Both weddings and events can get expensive, so let's learn some strategies to keep costs reasonable.

Step 8 Keep Costs Reasonable

- ❑ Now that you've talked to your clients at length about their budget, it's time to start working with vendors to secure their services.

Work with Vendors—You Get What You Pay For

As you begin looking for prices on specific budget items, you will have in mind all of your client's concerns and financial constraints. While it may be tempting to try to save money for your client by bargaining vendors down to rock bottom, consider these two scenarios:

Scenario 1: Carolyn and Jeff have come up with a certain sum of money to work with in planning their wedding. It's a significant amount, but they have indicated to you that they'd like to save as much money as possible for their honeymoon. So, even though you know they have \$1500 in their budget for flowers, when you meet with the florist, Beth, you give her a lower number—say \$800—to see if you can save your clients some money. As Beth shows possible arrangements, you then try to negotiate the best rate so that you can get your clients the lowest price.

Scenario 2: When Carolyn and Jeff say they want to save money for their honeymoon, you suggest they include realistic honeymoon costs in their wedding budget. You urge the couple to give you a price—or a range—that they are truly willing to spend for flowers, and then, from your experience with local florists, you give them a picture of what they can afford at that price. If Beth shows you a nice package that's a little out of the range of what your clients can afford, you ask if she can create that look for less money. When you work with Beth, you give her a realistic range of what your clients would like to pay and accept Beth's stated prices, which you know from experience and comparisons with other florists are reasonable.

Which approach do you think will work better for the bride and groom and for you? Let's see what happens in each case.

In the first scenario, Beth is likely to show you flowers within the stated price range that do not meet your clients' expectations. Your appointment with Beth will take longer



When you meet with your floral vendors, you try to negotiate the best rate for your clients.

than necessary and be frustrating for both of you, since Beth won't know what Carolyn and Jeff really want. If Beth does come down in price on her flowers, she may be annoyed when she delivers the flowers to the reception and sees what was spent on other aspects of the wedding. In an extreme case, the quality of her service may suffer because of this annoyance. Either way, Beth is inclined to distrust you in the future, and she may increase her prices or decrease her usually excellent service standards for your future clients.

In the second scenario, Beth shows you flowers within your clients' range from the beginning, so they tend to be closer to what Carolyn and Jeff have said they want. Your initial appointment goes more smoothly, and both of you leave the meeting satisfied. When Beth delivers the flowers, she will be pleased that you have brought her profitable business. She will be eager to work with you on future weddings, and may be inclined to be more flexible with your clients than with other clients, the longer the two of you work together.

It's important to develop good working relationships with vendors. From the above scenarios, we can gather some points to keep in mind when working to get the best prices and service for your clients:

- ❖ Be honest about what your client can spend. When possible, offer a realistic range.
- ❖ It's not always a good idea to bargain vendors down to where they don't make enough of a profit because they may be annoyed when they see how much was spent on something else. Pay vendors what they're worth.
- ❖ An effective Wedding and Event Planner mediates between clients and vendors to develop relationships that will ultimately serve both present and future clients.

Creative Ways to Cut Costs

Treating vendors fairly certainly does not mean that you can't help your client keep costs reasonable. On the contrary, after looking at an initial budget and hearing what a few vendors have to offer, many of your clients will look to you for advice on how to cut some expenses. When clients are concerned about costs, you can help them think of creative ways to decrease expenses. After you've done a few weddings and events, you'll have plenty of experience and ideas to share with clients. Even now, you can probably think of a few ways to keep costs down. Think about your own wedding and weddings of friends, or creative things you've done in the past to keep costs down for parties you've thrown or attended.

You'll discover ways to cut costs by coming up with creative ways to take care of the details that make any wedding or event special. These details will be covered in more depth in a later lesson. Some cost-cutting ideas are listed on the following page to get you started.

Expert Advice

Making a Budget

Unless you have a client who is really interested in the math, crunch numbers out of the presence of your clients or they'll get bored.

Wedding Attire

- ❖ Suggest the bride purchase a ready-to-wear dress from a department store or a wedding dress that fits her without any major alterations.
- ❖ Point out that many wedding shops and boutiques sell sample dresses or discontinued styles at a discount, often at the end of a season.
- ❖ Hundreds of dollars can be saved on the wedding dress if the bride uses a white or ivory bridesmaid's dress with embellishments
- ❖ Suggest that the bride check the newspaper, consignment shops and second-hand stores for dresses purchased for weddings that were canceled.
- ❖ The bride could wear her mother's dress.
- ❖ Most formalwear shops offer the groom's tux free or at a discount (after a certain number are rented for the wedding party and fathers).



Your client can save money by purchasing a wedding dress that doesn't need alterations or is a sample dress.

Accessories

- ❖ If the bride is good with her hands (or has friends who are), suggest she make her own garter or ring pillow.
- ❖ Consider using family heirlooms such as goblets for the toasting glasses, or borrow the cake knife and serving set.

Invitations

- ❖ The client could order pre-packaged cards and use a computer invitation program to design and print their own invitations.
- ❖ The reception information can be included on the ceremony invitation, and guests can be asked to RSVP on a Web site or by phone rather than on a separate response card.
- ❖ Most invitations require extra postage—your client might look for an invitation that needs only standard postage.

Reception

- ❖ You can always suggest that the guest list be reduced, if costs are getting out of hand.
- ❖ Your clients might hold the reception in a friend or family member's home or backyard rather than somewhere that requires a site fee.

- ❖ Encourage your clients to hold a morning or afternoon reception, or have their wedding during the week. Popular ceremony and reception sites will charge top dollar for Saturday nights.
- ❖ Also, if the wedding is in the afternoon, the couple might offer cake or cocktails and simple hors d'oeuvres rather than a full meal.
- ❖ You can suggest a self-catered reception at which food would be served buffet style. Serving dishes can be borrowed from friends rather than rented, and liquor and food can be purchased from wholesalers. Be wary of this suggestion though, because a self-catered event will require more staff help. In fact, some wedding planners charge a no-caterer fee because of the extra staff requirements.
- ❖ If the reception is catered, chicken and pasta are less expensive alternatives, as is in-season food.
- ❖ Suggest a cash bar rather than a hosted, “open” bar.
- ❖ Use a facility that allows you to bring in your own alcohol.
- ❖ Control alcohol consumption by serving it all at once at pre-established times.
- ❖ Consider serving just wine and beer or house brands of alcohol.
- ❖ Use a false tier in the wedding cake.

Flowers and Decorations

- ❖ The bride can carry a small bouquet or a single flower—sometimes simple is just as lovely as extravagant.
- ❖ The bride could use cut flowers or decorate with potted plants. Or, perhaps a family member can create the floral arrangements.
- ❖ Table centerpieces can be made from a single flower in a bud vase or from silk flowers.
- ❖ Outdoor ceremonies usually require less elaborate floral arrangements because natural beauty is already available.
- ❖ Use in-season flowers or flowers from a friend or family member's garden.
- ❖ Suggest that the same floral arrangements might be used for both the ceremony and reception. For example, candelabra flower arrangements from the ceremony site make good buffet-table or head-table centerpieces.
- ❖ Check into floral schools in your area. These may offer services free or at a discount.

Music

- ❖ Ask the couple if they have any musical friends who might play or sing during the ceremony.
- ❖ For the reception, the couple can hire a band with only a few musicians, use a deejay or use CDs and ask a friend to act as deejay. If you have an mp3 player, you can create a playlist and plug it into your site's stereo.



To save money, suggest that the couple order the smallest possible photo package.

Photographs

- ❖ Wedding photographers are quite expensive—suggest the couple order the smallest possible package. You also can ask friends to take candid shots throughout the day.
- ❖ If the couple has a friend with good equipment and experience who volunteers to take the wedding pictures, encourage them to accept the offer.

Like weddings, you can save some money when you plan events as well. Here are a few suggestions for cutting event costs.

Invitations

- ❖ Depending on the formality and size of your event, perhaps you could deliver invitations or e-mail invitations.

Food/Beverages

- ❖ If you need to cut costs, a buffet is more cost efficient than a plated dinner. Or, host a cocktail party and serve hors d'oeuvres instead of a full meal.
- ❖ Serve soft drinks, coffee, tea, wine and beer, and provide a cash bar for other alcoholic beverages.

Location

- ❖ Hold the event in a friend or family member's home or backyard rather than a rented site.

Decorations

- ❖ If your event occurs near a holiday, you can use the holiday decorations and save money. For example, if you're planning a cocktail party for your client's small office, hold it in December. Most likely, the location will be decorated with lights, poinsettias and greenery, so you'll need few decorations.
- ❖ If you're including floral arrangements, use in-season flowers.

Music

- ❖ Use CDs and ask a friend to act as deejay. If you have an mp3 player, you can create a playlist and plug it into your site's stereo.

As you can see, there are plenty of creative ways for your clients to save money without missing out on anything that's important to them. You can probably think of others not mentioned here. As with everything else, let your clients decide what to spend more or less on, because everyone has a different idea about what's important. Then make suggestions that fit your client's idea of the perfect wedding.

Step 9 Ensure That Your Services Are Valued

- ❑ At this point, you may be concerned that once they hear how much a wedding really costs and start thinking of ways to save money, Carolyn and Jeff might decide one easy way to cut corners is to cut out your services altogether! This can be a concern for Wedding Consultants just starting out. Once clients start focusing on budget specifics, they may consider cutting out the consultant, mistakenly thinking that's a good way to keep expenses down. Don't worry, though. With a little tact, you can prevent this from becoming an issue by firming up your contract before talking about budgets, emphasizing that your relationships with vendors can save clients time and money and keeping the lines of communication open.

First, firm up your contract and set your fee before you have a detailed budget conversation. Remember, establishing a contract is one of the first steps for working with a new client. In that initial meeting, you'll explain to the client the unique services you offer and help her appreciate the value of a professional Wedding and Event Consultant. Having signed a contract, your client will feel more secure knowing you're working for her best interest. She'll be less likely to doubt the value of your services. You can then talk openly about costs without worrying whether your service is still under consideration.

Second, explain how your relationship with vendors may help save costs. If, once you start to talk about a detailed budget, your client still questions the value of your services, you can remind her that you have worked with most of the wedding and event vendors in town—from ceremony and reception sites to musicians and florists. Because you know all of the vendors, you can ensure your clients hire only those vendors who offer the best value. And because those vendors know and trust you, and you bring them a lot of business, they may be able to offer you discounts that you then pass along to your clients.

Third, keep lines of communication open. Many people get embarrassed talking about money. But if you seem comfortable talking about budgets, and if you are honest and forthcoming about money matters, your client will be, too. Assure clients of your absolute confidentiality and encourage them to let you know if their financial circumstances change at any point in the planning process. If they are accustomed to talking to you openly about money, they will be less likely suddenly to drop your services if they have less money than they thought.

Most clients don't really have a firm idea of their budget when they begin the process. They will be grateful for your experience and relieved to have someone talk them through this challenging step in planning their event or wedding. Handled tactfully, the budget process can be one that cements your relationship with a client and earns you their trust and respect.

Let's review what you've learned in this section.

Step 10 Practice Exercise 4-2

For questions 1 through 5, choose the best answer from the choices provided.

1. **When working with vendors, it's a good idea to ____.**
 - a. be honest about what your client can spend
 - b. try to bargain the vendor down in price
 - c. tell the vendor your client is willing to spend less than they actually are
 - d. none of the above

2. **A Wedding Planner mediates between client and ____.**
 - a. family members
 - b. vendors
 - c. clergy
 - d. all of the above

3. **When clients are concerned about costs, a Wedding Planner can ____.**
 - a. try to bargain with vendors
 - b. encourage the client to ask other family members for help
 - c. help them think of creative ways to decrease expenses
 - d. suggest the client not use a Wedding Planner

4. **One way to cut wedding costs is to ____.**
 - a. serve seafood
 - b. hold a morning or afternoon reception
 - c. hold the wedding on Saturday night
 - d. all of the above

5. **Ensure your services are valued by ____.**
 - a. writing up a contract after talking about budgets
 - b. avoiding talking about money whenever possible
 - c. firming up your contract before talking about budgets, emphasizing how your relationship with vendors may help save costs, and keeping the lines of communication open
 - d. none of the above

6. **You're helping two clients from a local real estate office plan a celebratory event. Your clients have mentioned that their budget is tight, and they'd like some suggestions to save some money. List two suggestions that you could offer your clients to save money.**

Step 11 Review Practice Exercise 4-2

- Compare your answers with the Answer Key at the end of this instruction pack. Correct any mistakes you may have made.

Step 12 Lesson Summary

- Helping clients plan their wedding or event budget is one of the most important aspects of your job as a Wedding and Event Planner. The process begins by asking the client some general questions about expectations for the wedding or event. This will help you and the client determine what's most important to the client, how formal a wedding the couple would like, how large the event is and how much they want or expect to pay. During this conversation, you will also want to explore whether or not anyone other than the client (whether that be the bride, bride and groom, bride's mother or someone else) will help finance the wedding or event.

You can then begin to go over specific items that will be included in a budget. This list includes items for the ceremony and reception, as well as wedding attire, stationery, gifts, flowers, photography/videography and more. For other events, decorations, food, beverages, location and entertainment should be included in the budget. Don't forget to include your own services in this list as well! While you'll be able to give your clients a ballpark idea of these expenses, flexibility is the key to this stage in the budget-planning process.

Your clients will probably also have questions about who will pay for what, especially if more than one person or family is involved in financing the wedding. After reading this lesson, you know that both a traditional arrangement and more modern possibilities exist. Your clients should select the arrangement that best meets their needs and financial situation. Remember that regardless of how expenses are divided, your client is the person who pays you—this needs to be established in your contract and you need to keep it in mind as you help with planning decisions because you'll want to make that person's satisfaction a top priority.

Once you begin to work within the budget your client has set, you'll want to keep several things in mind. First of all, honesty is important when working with vendors. Be up front with both your client and the vendor about how much things cost and how much your client is willing or able to spend. You can still help your client save money while treating vendors fairly. After reading this lesson, you are able to offer your client many creative ideas for cutting costs. Keep in mind, though, that cutting costs shouldn't mean cutting your services. You can ensure this doesn't happen by establishing a contract before talking about the budget, emphasizing that your relationships with vendors can save your clients money.

In the next lesson, we'll look at event details, such as location, food, beverages and decorations.

Step 13 Mail-in Quiz 4

- Follow the steps to complete the quiz.
 - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
 - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
 - c. When you've finished, transfer your answers to the Scanner Answer Sheet included. Use only blue or black ink on your Scanner Answer Sheet.
 - d. **Important!** Please fill in all information requested on your Scanner Answer Sheet or when submitting your quiz online.
 - e. Submit your answers to the school via mail, e-mail, fax or, to receive your grade immediately, submit your answers online at www.uscareerinstitute.edu.

Mail-in Quiz 4

For questions 1 through 18, choose the best answers from the choices provided.

1. **Deciding on the formality of a wedding early _____.**
 - a. helps clients focus on what's most important to them
 - b. will limit a client's options too much
 - c. helps clients establish a realistic budget
 - d. a and c

2. **A wedding budget _____.**
 - a. can usually be firmed up in one meeting
 - b. is never 100% firm
 - c. will not vary much from client to client
 - d. is something your client doesn't need to be involved in

- 3. Advise your clients to be flexible about ____.**
 - a. how formal they want the wedding to be
 - b. what's most important to them
 - c. individual budget items
 - d. their "bottom line" figure

- 4. Although many modern arrangements now exist for covering wedding expenses, most couples will ____.**
 - a. at least want to be informed about tradition before they make a decision for their own situation
 - b. want to use the traditional guidelines
 - c. want to pay for their own wedding
 - d. want you to decide who should pay for what

- 5. Wedding-party attendants traditionally pay for their ____.**
 - a. own attire (except for flowers)
 - b. travel expenses
 - c. flowers
 - d. a and b

- 6. The groom's family might pay the entire cost of the wedding if ____.**
 - a. the wedding will be held at their home
 - b. the bride's family is deceased
 - c. it's the groom's second wedding
 - d. all of the above

- 7. The bride's parents should ____.**
 - a. always pay for the rehearsal dinner
 - b. approach the groom's family about sharing expenses
 - c. make the final decision of whether or not to accept the groom's family's offer to help with expenses
 - d. always accept offers of help from the groom's family

- 8. Your client is always the ____.**
 - a. groom's family
 - b. bride's sister
 - c. bride's mother
 - d. final decision-maker

- 9. If you tell vendors what clients are actually willing to spend, they will be more likely to ____.**
- a. show you products your clients will want
 - b. be pleased that you have brought them business
 - c. be eager to work with you on future weddings
 - d. all of the above
- 10. After looking at an initial budget and hearing what a few vendors have to offer, many of your clients will ____.**
- a. terminate their contracts with you
 - b. look to you for advice on how to cut some expenses
 - c. decide not to get married
 - d. all of the above
- 11. Your clients could save money on invitations by ____.**
- a. ordering pre-packaged cards
 - b. including reception information on the ceremony invitation
 - c. looking for an invitation that needs only standard postage
 - d. all of the above
- 12. There are plenty of creative ways for your clients to save money. You need to ____.**
- a. let your clients decide what to spend more or less on, because everyone has a different idea of what's important
 - b. tell them they will have to miss out on some of the things that are important to them
 - c. make suggestions based on your own idea of a perfect wedding
 - d. none of the above
- 13. If clients feel they can talk to you openly about money, they will ____.**
- a. be more likely to want to stop working with you if their financial situation changes
 - b. be less likely to suddenly drop your services if they have less money than they thought
 - c. want to pay you less
 - d. all of the above

- 14. When it comes to budgeting, most clients ____.**
- a. don't really have a firm idea of their budget when they begin the process
 - b. will be grateful for your experience
 - c. will be relieved to have someone talk them through this challenging step in planning their wedding
 - d. all of the above
- 15. Having each family pay for their own guests is a good budget option because ____.**
- a. it is traditional
 - b. the groom's family feels included in the festivities
 - c. it helps minimize awkward feelings about the guest list
 - d. all family members should pay their fair share
- 16. You and your client, Jason, are planning a large event. Jason doesn't want to allocate money for entertainment, but would like some background music. What could you suggest? ____**
- a. No music
 - b. A band
 - c. Play CDs
 - d. A deejay
- 17. Before you have a detailed budget conversation, first firm up your ____.**
- a. vision and submit your bill
 - b. budget and fees
 - c. fee
 - d. contract and set your fee
- 18. You're meeting with a client to discuss the budget in detail, and she examines the list for items to cut. In order to deter her from doubting the value of your services, you ____.**
- a. mention other planners whose fees are less than yours
 - b. explain how your relationship with vendors may help save costs
 - c. offer to consult for free
 - d. none of the above

CONGRATULATIONS

You've completed
Lesson 4.



Don't wait for your quiz results to continue with Lesson 5.

Event Details—Corporate and Private Events

5

Step 1 Learning Objectives for Lesson 5

- When you have completed the instruction in this lesson, you will be trained to do the following:
 - ❖ Describe how to assist your clients to find appropriate locations for their events.
 - ❖ Explain how to secure locations for your clients.
 - ❖ Explain how to select food and refreshment options for an event.
 - ❖ Provide room set up suggestions based on the goal of the event.
 - ❖ Ask effective questions when you make arrangements with caterers and other vendors.
 - ❖ Provide creative decoration options for different events.
 - ❖ Describe how to reserve decorations from vendors in your area for your clients' events.

Step 2 Lesson Preview

- If successful events and the details that go into creating them satisfy you, you're going into the right profession. As an Event Planner, you become familiar with a wide variety of locations: from hotels and convention centers, to orchards and beaches, to museums or even airplane hangars. You familiarize yourself with a wide variety of foods and drinks, and you get to plan room decorations that can vary as widely as the range of your ideas.

On the day of a successful event, things will often seem to come together like magic. But under the smooth surface of parties and events hides the Event Planner's enormous amount of planning and know-how. In this lesson, you will learn about three of the most important categories necessary for you to fulfill your clients'



On the day of a successful event, things will often seem to come together like magic for your clients.

visions: event locations, food and beverage options and decoration ideas. You'll study the wide range of options at your disposal, as well as the technical details, such as contracts and guarantees, that allow you to turn ideas into realities. Read about how to effectively deal with site managers, caterers and vendors, and learn cost-saving tips that will earn your clients' respect and gratitude. When you finish this lesson, you'll know so much more about what goes into planning a successful event.

Now, let's begin this lesson with a discussion about locations.

Step 3 Select a Good Location

- ❑ In this section, we'll talk about how to find and secure a good location for an event. It's important to visit facilities beforehand and have standard questions to ask that will help you to make the right choice. As you'll learn in a later lesson, many of the basics of event planning are the same as those in wedding planning, but there are also a number of differences. Probably the biggest difference is the vast variety of sites available to you as you plan an event. While you might hold both a wedding reception and a business party in an event hall, few wedding receptions take place at the zoo. However, you might hold certain events in such unusual locations.



While you might hold events at unusual locations, such as zoos, few wedding receptions take place at zoos.

Usually, the first major decision in the event-planning process is to select the location. It's a good idea to choose a location for your event before you decide on food or decorations because some sites provide their own catering service and decorations. It's also important to decide on a site first because with busy sites, you often have to be flexible about the date of your event, and you need to confirm the date of your event before you can start to make other plans.

Know Your Options—Different Sites for Different Occasions

There are a number of factors to consider as you select the right location for an event. These include, but are not limited to:

- ❖ Purpose of the event (birthday party, family get-together, meeting, convention, fundraiser, etc.)
- ❖ Size of the event
- ❖ Theme of the event (if it has one)

- ❖ Budget for the event
- ❖ Date of the event, including seasonal concerns
- ❖ Activities planned for the event (music, speakers, food and drink)
- ❖ Kind of people who will attend the event (religious, business-oriented, families, etc.)
- ❖ Place from which most people travel to the event
- ❖ Whether your clients want a site that provides full services or want to work with independent vendors

These are some of the factors you should think about before you consider actual sites for an event you plan. You probably wouldn't want to hold a business luncheon at a church, for example, or a children's party at a convention center.

The kind of role that your client hires you to fulfill also determines the criteria you use as you select a location. Sometimes, your client may tell you where the event will occur, and you won't be involved at all in the decision. Other times, a client may have an idea of where they want to host the event—somewhere outdoors, for example, or someplace that lends itself to a certain theme—but he won't know the exact place to fit his idea. At the most open-ended extreme, a client may not have any idea at all about where to host the event. For example, he may only know that he wants to have a fun time at a place within the range of his budget.

Forethought and common sense are key at this early stage in planning. To begin, make a checklist of the special needs you have for the event that you must plan. After you have a good idea about these needs, you can begin to consider different kinds of sites. The following list, though by no means all-inclusive, gives you an idea of the range of places at your disposal. Use the list that follows to help you brainstorm other locations in your area.

Common Indoor Sites

- ❖ Event halls
- ❖ Hotels
- ❖ Convention centers
- ❖ Restaurants
- ❖ Private residences
- ❖ Office buildings
- ❖ University halls
- ❖ Library rooms
- ❖ Rooms in museums and art galleries
- ❖ Bars
- ❖ Country clubs
- ❖ Department stores and other retail outlets
- ❖ Religious facilities
- ❖ Sports facilities
- ❖ Historical sites of interests

Outdoor Sites

- ❖ Parks
- ❖ Beaches
- ❖ Backyards
- ❖ Patios
- ❖ Farms
- ❖ Pools
- ❖ Zoos
- ❖ Orchards
- ❖ Vineyards
- ❖ Natural hot springs
- ❖ Lake or river banks
- ❖ Amusement parks
- ❖ Botanical gardens
- ❖ National parks
- ❖ Mountains
- ❖ Building tops

Now, don't let conventional sites limit you. An unusual site can make a theme party come to life (imagine an old-West party at an actual ghost town), or, it can make a non-theme-oriented event one that the guests will never forget. The range of unusual sites is limitless, but following are some to stir your creative juices:

Unusual Sites

- ❖ An old mansion
- ❖ Movie theater
- ❖ Railroad car or train
- ❖ Riverboat
- ❖ Nightclub
- ❖ Cave
- ❖ Castle
- ❖ Health club
- ❖ Barn
- ❖ Bowling alley
- ❖ Moving bus
- ❖ Skating rink
- ❖ Bank
- ❖ Lighthouse
- ❖ Riding stable
- ❖ Casino
- ❖ Circus
- ❖ Ski lodge
- ❖ Yacht



Although some are unusual, less-conventional sites can help complement an event's theme. For example, perhaps you could hold a Halloween-themed company party at a rustic barn.

Of course these are only types of facilities. As an Event Planner, you'll need to come up with actual sites to fit the bill. You probably already know of at least a few specific places in your community that hold social and business events. For more help in finding actual sites to fit your ideas, try:

- ❖ Local newspapers
- ❖ Chamber of commerce
- ❖ Bureau of tourism
- ❖ Historical societies
- ❖ Phone book
- ❖ Internet
- ❖ Referrals from friends and associates

Choose the Right Site

After you generate a list of potential sites for the event you're planning, you need to find out more about each one. Doing so will help you decide which one to choose. The size of the event and whether the event is social or business will influence the process of narrowing your choices. It's extremely important to make contact with the official in charge as soon as possible because popular sites will book far in advance.

Ask the Right Questions

Naturally, you'll want to find out all the crucial information about each site that you consider as soon as possible. The official in charge of a site may be called the site manager or coordinator, or a number of other names, but, for the purposes of this lesson, we'll refer to him or her as the site manager. It's important to establish a good rapport with a site manager. Your relationship with him or her can be crucial to your success as you find the right site and establish a contract to use the facility. Often, each site manager will provide you with information fact sheets, a sample contract and copies of site rules and regulations. Here is a list of questions that you can use as you narrow your list of sites:

- ❖ How much will it cost to use this site? What is the payment plan?
- ❖ What is the deposit?
- ❖ Does the site match the goal of the event?
- ❖ Is a security deposit required? How much is it? When will it be refunded?



Establish a good rapport with every site manager that you meet.

- ❖ Does the site offer a party or event package? If so, what does the package include?
- ❖ Are there any times of the day, week or year during which the cost to secure the site is discounted?
- ❖ Does the facility carry liability insurance?
- ❖ How many people can the site accommodate?
- ❖ If the site holds more than one event at one time, where exactly in the site will my client's event occur? And what other specific events will be held there at the same time? Will they be noisy or otherwise distracting in any way?
- ❖ How many hours is the site available? Do any penalty charges apply if your client stays longer? Is there a minimum amount of time that the site must be rented for?
- ❖ Are there any restrictions that involve decorations?
- ❖ Are chairs, tables, table linens, plates, glasses and silverware provided? What (if any) is the rental fee for these items?
- ❖ Are cooking facilities available?
- ❖ Can you use the caterer of your choice, or is there an in-house caterer that the event must use?
- ❖ Are there any restrictions on the time of day during which music may be played? What about restrictions on the type or volume of music?
- ❖ Are musical instruments available for use? Does an additional rental fee apply?
- ❖ Are there any restrictions on alcohol consumption?
- ❖ May you provide your own liquor? If not, what is the per-drink or per-person charge?
- ❖ Is there a corkage fee associated with wine or champagne?
- ❖ Is there an area for dancing?
- ❖ Is a microphone provided?
- ❖ What sort of restroom facilities does the site offer?
- ❖ Does the site provide a coat check? Is there an additional fee?
- ❖ What sort of parking is available? Is there an additional fee?
- ❖ Can any outdoor areas be tented? Does the site provide this service? If so, does an additional charge apply?

- ❖ What considerations are made in the event of bad weather?
- ❖ Do neighbors, security companies or police need to be notified that an event is taking place?
- ❖ Are heaters and lights provided for outside areas? Is there sufficient electrical power available to use them?
- ❖ Is setup and strike (tear-down) included?
- ❖ Does the rental fee include post-reception clean-up?
- ❖ What is the policy in the event of cancellation?
- ❖ Is the site handicap-accessible? (Most large facilities provide a fact sheet detailing that they are compliant with the ADA, or Americans with Disabilities Act, a federal law that requires that all public places be handicap-accessible.)

Whew—there are a lot of questions to ask!

In addition to all of the questions that we just discussed, you'll need to consider site location. There are a couple of concerns that we must mention in regard to location of the site. For one, you'll want to consider from where the majority of the event participants are traveling. This is often a very important consideration. Also, with some events, the location of the site rotates each year to be fair to individuals who live in different areas. You'll need to find out if this is the case for each event that you plan. If it is, you'll need to know the general area in which the event is to be held this time around.



Take into account from where participants travel as you narrow your site choices.

Of course, all of the questions that we discussed may not be necessary or appropriate for you to ask the site manager. (You won't need lights for an outdoor event that takes place during the day, for example.) And, there may be some questions related to the specific purpose of the event that we did not include in our list. After each site manager answers all of your questions, you'll need to weigh and balance the different factors to come to a decision. Some factors, such as cost and size, will immediately eliminate some sites, while other factors will require more consideration.

Visit the Site

Before you can make a recommendation to your client, you'll want to actually visit the sites that top your list of favorites. As you gain experience in event planning, you'll become increasingly familiar with different sites in your area, and, in some cases, you won't need to visit a site because you're already familiar with it. However, even when you are familiar with the site, it's a good idea to revisit it every six months or so. After all, you may rent the site at a different time of day or season, or the event you're hosting now may be different enough from the first one that the site warrants a second visit.

There are some things that you can do to make your visit to each site productive. If the event that you plan has a theme or a predetermined set of decorations, imagine how the theme or decorations will fit with the site in question. A modern or industrial facility, for example, might better suit a futuristic theme party than would a more rustic location. Take notes as you visit each site, and make it a point to cover all of the most important details. It's a good idea to take digital photographs and obtain room diagrams. You can present these to your clients later to help them make up their minds. Sometimes, a site can also provide you with a floor-plan diagram, and, if so, be sure to ask if the diagram is to scale. Check that the diagram includes columns and other barriers, and consider these when you plan seating and where people will stand. If there is furniture (or other items) present, you will want to ask if the site will provide the furniture for your event. Also, when space is really an issue, you may want to take measurements of crucial areas yourself.

If possible, you'll want to visit the site at the same time of day or night that the event that you plan will occur. This will allow you to see the site as your clients will see it. If view or scenery is important to your client, this will be an especially good idea. Your site visit is also a good time to meet with the site manager in person and ask any questions that you might not have been able to ask or find the answers to. If the site manager has a standard contract for the site, this is a good time to obtain a copy to carefully review at your office.

Arrive at a Deal—Book the Site

After you visit sites, talk with the site managers and receive answers to all of your questions, you are ready to make a site recommendation to your client. When you meet with your client, bring all of the information that you have about the site that you chose, including notes, photos, seating charts, the contract and anything else you think may be useful. Depending on your client's needs, you may want to recommend a single site, or you may want to present two or three sites to your client as different options. In any event, you won't want to overwhelm your client with too many options. Part of your job, after all, is to narrow the range of choices to appropriate sites. Your client will often want to take some time to review the information you provide and may want to visit the site or sites before he makes a decision.

When your client reaches a decision about where he or she wants to hold the event, you'll need to work out the details of the contract. In almost all cases, the site facility will provide you with a standard contract, but, sometimes—as with novel site locations—you may need to draw up a contract yourself. In either case, you will need to review the contract based on your client's needs. Always make sure that the contract covers every detail relevant to the event. It's best if your client signs the site

agreement so that he or she is legally responsible, but you may also choose to subcontract. In that case, your name will be on the agreement, and you will be legally responsible. If you make any changes in the contract, both the client (or you, if you subcontracted) and the person in charge of the facility need to initial those changes.

A facility (and other service providers) usually includes a termination clause in the contract that says it is not responsible in case of acts of God, war, labor strikes, fire, etc. You may also wish to add things that are to your advantage, such as a clause for valet parking in case of rain, for example. Remember, the best contract is one that pleases both the site facility and your client. In other words, agreeing on contracts should be a win-win situation for both parties.



When you meet with your client, bring all of the information you have on your site choices.

Here is a list of items that a site contract should include:

1. Total cost
2. A line-item breakdown of the services that the facility will include
3. The amount of deposit, when the facility received it and whether it's refundable
4. The amount of the remaining balance, including details of the payment schedule
5. Exact date of the event
6. Exact time of the event
7. Exactly where the event will occur (specify the name of the hall, room or building, etc.)
8. The length of time for which the event site will be available
9. A very specific list of all of the materials that are available for your event's use (includes table linens, silverware, microphones, chairs, tables or anything else your client requires)
10. The refund policy that applies in the event of cancellation
11. Any extras that you and the site manager agreed to (if you include these on the contract, it will ensure that they actually happen)
12. Whether the facility includes setup, strike (take-down) and clean-up

The Vance Inn

333 East Meadow Parkway
Bayshore, NJ 07222

Catering Contract

Definite Revision Hotel Contact: Todd Brown Date: 5/15/XX

Name of Group: Mary Sellman, Events Beautiful
Address: 1449 Fenway Ave.
City: Edgewater, NJ 07062
Phone: (123) 333-4441

Schedule of Events

Day-Date	Hour	Function	Attendance
Saturday May 15, 20XX	2 p.m.-10 p.m.	Set Up/Wedding	200

Comments

Number of Guests: 150 Room Rental: \$750 Deposit Required: \$250
Catering: \$20/guest

BILLING INSTRUCTIONS:

Please include required deposit. The balance will be due at least 30 days prior to your function date. A credit card guarantee is required for additional food and beverage that you purchase during your function.

CANCELLATION TERMS:

This agreement may be terminated only when the client gives written notification to the Vance Inn. In the event that Todd Brown receives notification of termination, the site will assess a cancellation fee equal to one-half the anticipated revenue. This fee will include the advance deposit. Expenses that the hotel incurs in preparation for the function will be the client's responsibility.

Catering Contract

ALL RESERVATIONS AND AGREEMENTS ARE MADE UPON AND ARE SUBJECT TO THE FOLLOWING RULES AND REGULATIONS AND CONDITIONS

1. Client must provide final confirmation of the number of people who will attend this function to the hotel at least 48 hours before the function date. The Vance Inn must provide all beverages. The inn must obtain a minimum fee of \$300 through beverage sales.
2. All federal, state and municipal taxes which may be imposed or be applicable to this agreement and to the services that the Vance Inn renders are in addition to the prices herein agreed upon, and the client agrees to pay them.
3. Performance of the agreement is contingent on the ability of the hotel management to complete the same and is subject to labor troubles, disputes or strikes; accidents; government requisitions; other causes whether enumerated herein, beyond control or management preventing or interfering with performance. In no event will the hotel be liable for the loss of profit or consequential damages, whether based on breach of contract, warranty or otherwise. Hotel agrees not to rent designated space to another party for the date above.
4. The client must make full payment 30 days in advance of this function unless credit is established to the satisfaction of the hotel. If credit is approved, the client will pay a deposit at the time of signing this contract with the balance of the account due and payable upon receipt of the statement. For accounts more than 30 days in arrears, finance charges will be applicable.
5. All displays or exhibits, if any, conform to the City Code fire ordinance rules. The hotel will not permit the affixing of anything to the walls, floors or ceilings of rooms with nails, staples or tape. If the inn suffers any damage, it will bill the cost of repair and/or replacement to the client.
6. Client can arrange all special equipment and services with our Catering Department. For your convenience, we do provide Audio Visual services. If these do not fulfill your needs, we request that you notify the Catering Department in advance of any equipment that you will provide.
7. The hotel applies a mandatory 18 percent service charge to the room rental charge.
8. Deposit of \$500 for use of the Center Kitchen is required 30 days prior to the event. Access to the kitchen will be at 2 p.m. Saturday, May 15.
9. The hotel will provide round tables and chairs only. The client will provide all linens, flatware, service equipment, etc.
10. The inn will provide and set up banquet tables with skirting at no extra cost, as well as up to 30 30" x 6' tables.

SIGNATURE OF ACCEPTANCE Mary Sellman

ORGANIZATION Events Beautiful

Cost-saving Tips for Event Locations

OK, now that you know the basics of booking a site, let's factor in event budgets. Here are some money-saving tips that may help you when it comes to event locations.

- ❖ For small social events, you can save money if you host the event at a public area, such as a park or beach, or at someone's private residence. Keep in mind that many parks require licenses or permits.
- ❖ For seasonal parties (Christmas, New Year's), see if facilities provide decorations. Some facilities will decorate areas with seasonal items and can provide centerpieces at no extra cost.
- ❖ When you use a hotel, the price of a meeting room is often complimentary or reduced if the hotel handles meal functions. Other package deals for hotels include free meeting rooms or meal services when you book accommodations for a certain number of guests, and deals where you receive a certain amount of free rooms if you book a large number of rooms.
- ❖ Book the site in the off-season or on a less popular day of the week.

In a moment, we are going to discuss food and refreshment options for a variety of events. However, first, complete the Practice Exercise that follows.

Step 4 Practice Exercise 5-1

For questions 1 through 5, choose the best answer from the choices provided.

1. **Which of the following are common indoor site locations?** _____
 - a. Banks, health clubs and post offices
 - b. Convention centers, hotels and private residences
 - c. Beaches, parks and farms
 - d. Old mansions, zoos and churches

2. **For help in finding actual sites to fit your ideas, try the _____.**
 - a. library
 - b. USA Today
 - c. penitentiary
 - d. Chamber of Commerce

- 3. It's extremely important to make contact with the official in charge of a site ____.**
- a. as soon as possible
 - b. at least a day or two before the event
 - c. after the event
 - d. when it's convenient
- 4. Which of the following can you do to make your visit to the site more productive? ____**
- a. Rush through the site to save time
 - b. Bring your own contract to the site
 - c. Take photographs of the site
 - d. Request to look at the site without the site manager
- 5. Before you make a recommendation to your client, make sure you ____.**
- a. reserve the site
 - b. visit the site
 - c. sign the contract
 - d. request valet parking

For questions 6 through 8, answer the questions in the provided spaces.

- 6. What types of questions should you ask the site manager about a potential site for your event? Provide at least four questions. _____**

- 7. What are two points that the site contract should include? Why should the contract include the two points that you chose? _____**

8. **Your client asked you to help plan a corporate reception that concludes a week-long sales meeting. The president of the company wants the reception to have a nautical theme. Can you offer your client two indoor and outdoor site ideas? Why might each site be a good option? A poor option?**

Step 5 Review Practice Exercise 5-1

- Compare your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 6 Food and Refreshments

- In front of the guests at the reunion of a glee club sit the last plates of a five-course meal. The baked apples filled with walnuts and currants look delicious, but few of the guests have room for one more bite. They already sampled their appetizers of spinach and roasted pepper frittatas, enjoyed a fall greens salad with fennel and marinated mushrooms, devoured potato-corn chowder and delighted in a main course of fettuccine tossed with garlic, shrimp and scallops. Everyone is happy, even the most particular guest—who doesn't like seafood—received his fettuccine with tomato sauce and Italian sausage.



Your careful planning ensures that any dinner is a success.

What the group doesn't see is the expert preparation that went into planning the dinner. You knew that the dinner, the central event of the reunion, was the key to a successful event. So you found out early in the event-planning process what kinds of foods the members of the club enjoyed. Since they loved lots of fresh vegetables, you checked a number of catering possibilities to save the group money, and you hired servers well versed in the French serving style to lend the affair a touch of elegance.

All these aspects of preparation—and more—are part of your role as an Event Planner. Now, let's take a closer look at the details that lead to terrific food and beverages at parties and other events.

Food, Beverages and the Event Planner's Role

There are a number of steps that you must take to plan food and beverages for events. They include:

1. menu planning
2. food and beverage purchase-quantity guidelines
3. room setup
4. service style

As an Event Planner, your involvement with each of these steps will vary depending on the task and on the type of event that you plan.

Menu planning can be as simple as chicken, biscuits and potato salad for an office picnic, to something as complex as a large multi-course meal for an elegant corporate meeting. While you plan the menu, it is the caterers' responsibility to handle the details involved in executing meals for events. If the food is prepared on-site, the facility's staff will take care of the details. With small events, you may serve pre-prepared foods from a grocery store, deli or other facility. For example, when you hold an event at a church, which in some states may have a health-approved kitchen, you will have the option to cook the food yourself. But this is rare.



With event planning, there is often a large variety of menu options and concerns that you'll want to discuss with your caterer.

A later lesson covers the details of how to choose, work and establish a contract with caterers. You'll find some cost-saving tips for caterers at the end of this instruction. In general, the biggest difference between catering arrangements for wedding receptions and for other types of events is that with event planning, there is often a larger variety of options. Your caterer or other food-service staff will know of a variety of styles of menu planning and food-quantity issues for events of different types and sizes. When you find the right caterer for an event that you organize, you should discuss these issues with him.

Now, let's move on to room setup. How might it influence an event that you plan? Well, you'll study just that in the next section!

Room Setup

At the last large dinner party or banquet that you attended, did you notice the table setup? Can you remember now? There's a good chance that the answer to these questions is, "No." That is, unless the tables were arranged in a way that guests found inconvenient. In general, room setup—like parking—is something that you notice only when it isn't working. If you do remember the table arrangement at the last event that you attended, and the setup wasn't a problem, congratulations! You have an eye for the kinds of details that are important to an Event Planner. Let's look at how you can help room setup become one of those unobtrusive details that facilitates a successful event.

The degree to which you are involved in the room setup varies from event to event, but setup will always involve you somehow. You may preset a room for some clients, while other clients will want to handle setup themselves. Unless there is no one else to handle setup, it's best to advise clients against doing the setup, which can be stressful on the day of an important event. The nominal fee that the rental company that provides tables and chairs charges is usually worth it.



Did you notice how the tables were arranged at the last event you attended?

For some events, your client will tell you what kind of seating she wants, and you need only to make sure that it happens. Sometimes, clients will let you handle the room setup. Others—such as facility personnel or caterers—will usually do the work. Even situations in which you don't arrange the room yourself, you will want to oversee the setup to ensure success for the event. When you oversee the setup, you can correct any mistakes that you see at that time instead of waiting until the last minute to fix them.

Seating Allowances

Perhaps the most important part of room setup is to simply make sure that there are enough places for the guests. Round tables, called **rounds**, and rectangular tables, called **banquets**, are the most common types of tables that you will use. Even if you use an alternate type of table, you can use the following guidelines to gauge how many people can comfortably sit at the table:

Table Seating Allowance	
Table Size	Number of Guests
60-inch round	Eight guests
72-inch round	Nine to 10 guests
6-foot banquet	Six guests (possibly two more at each end)
8-foot banquet	Eight guests (possibly two more at each end)

A good rule of thumb is to allow at least two feet per guest at any kind of table, though, if space is tight, you can always squeeze in more people. Alternatively, if you have the space to allow for extra comfort, allow three feet per person, or two people per side at a six-foot rectangular table and three people per side at an eight-foot rectangular table.

When you set up the tables in the room, it's crucial to allow ample space for servers and guests. In general, you should allow at least four feet between tables and four feet for the center aisle. Allow five to six feet for walking aisles. Allow three feet between tables and walls. All sites must legally comply with the ADA, but you should also think about how to accommodate guests of whose specific handicaps you are aware. You and the caterers should know capacity restrictions and fire codes for the site. You should also be mindful of evacuation procedures and communicate these with other staff or committee members.



As you lay out the table setup, leave enough space for servers and guests.

Setup Element	Recommended Space
Tables	Four feet between
Center Aisle	Four feet
Walking Aisles	Five to six feet
Tables and Walls	Three feet

As you plan the room setup, a seating diagram can be invaluable for your plans. We'll discuss seating diagrams now.

Seating Diagrams

If you work with corporate clients, seating diagrams will be expected as part of your planning service. If you have a copy of the floor diagram of the site that you chose, you can make your diagram on a copy of that. If you don't have one, you can sketch the room yourself with the necessary measurements. A **seating diagram** helps ensure that all of the guests and staff have the room they need for comfort and accessibility. The site's staff can also help you draw up and double-check a seating plan for individual tables. You can create seating diagrams to scale with graph paper, magnetic models or a computer program.

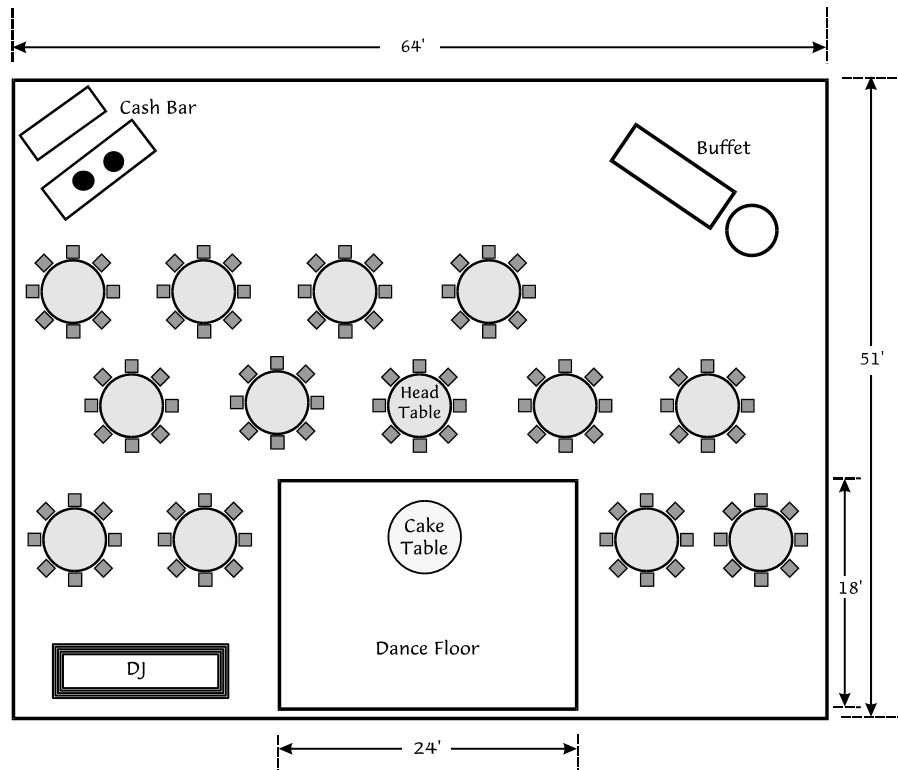
As you create your diagram, coordinate how the room will be set up with the audio-visual service, the caterer, entertainment and site manager. All of these people will have somewhat different needs, but the bottom line is that you all want the best setup for the event overall. After your discussions with everyone involved, you will often draw up a diagram and provide them with copies.

You also need to consider **traffic flow**, or how the guests will move throughout the event. Think about how people will move in and out of aisles or reach a stage or dance floor. How will they move most efficiently through buffets? Is there adequate space for guests to stand and wait for the buffet? Consider such details as not putting bars or other gathering places too close to entrances. Put entertainment at the back of the room whenever possible to make sure there are no "traffic jams." At trade shows and conventions, placement of booths is an art. For any kind of event, it's useful to keep in mind that people tend to move to their right first.

Remember, too, to consider your guests' line of sight. Are there barriers that block their view of crucial parts of the event? If so, draw these in to your diagram. How can you arrange seating to avoid these problems?

When you inquire about the capacity of a room, it's important not only to know the legal limit, but also what the room holds comfortably based on certain arrangements of tables, chairs and podiums.

Following is a sample seating diagram to use as a model when you create your own.



Head Tables

If there are VIPs, guests of honor, organizational leaders, speakers or other honored guests at the event you plan, it may be appropriate for you to setup a head table for them. **Head tables** usually involve pushing two or more banquet tables together to create a long, rectangular table at the head of the room. With head tables, one should skirt the side that faces the audience and not sit anyone at the table ends or on the side facing the audience. Head tables may not be appropriate for less formal occasions.

Seating Styles

In most events, seating styles depend on whether you choose to serve food at a buffet or at tables. But as you plan meetings or conferences, you will find that there are five common seating styles that you will generally use: conference style, hollow-square style, modified hollow-square style, theater style and schoolroom style. If the event involves an entertainer, a meeting, a slide show or film, a speech or other such activity, you'll want to consider that with regard to the seating style. The room's size and layout will also help you make a choice. You should also be aware that most meeting facilities and hotels have seating guidelines available in each seating style for their rooms.

Let's learn about the different seating styles.

Conference Style

With the **conference style**, two rows of banquet tables are pushed together along their long sides to make a larger table that resembles a conference table.

Hollow-square Style

If you line up the banquet tables end to end to form a square or rectangle with a space in the middle, this is the **hollow-square style** of table arrangement. Guests sit on the outside of the square or rectangle, so that they can all face toward the center and easily pay attention to the same speaker, instructor, etc.

Modified Hollow-square Style

The **modified hollow-square style** is the same as the hollow square, except that one of the tables is left out of the setup to allow easy access to the inside of the square or rectangle.

Theater Style

With the **theater style**, the chairs are set up in rows that face one direction. This style allows for the largest number of people to comfortably view the same event or screen, but it can make eating larger meals a problem since it doesn't usually involve tables. Be sure to allow a center aisle and at least two feet between rows with this setup. Also, guests can become uncomfortable if they don't have at least a foot's width between chairs. If the guests view a film or slide show, a good rule of thumb is to not seat anyone further away than 10 times the size of the screen. Most audio-visual services will advise you on how to arrange chairs based on industry standards.

Schoolroom

The **schoolroom style** involves two or three banquet tables placed end to end. Guests only sit on one side of the tables and face forward. The setup leaves one or more aisles open between the tables to resemble a schoolroom.

Last But Not Least...

For events that involve speakers, entertainers or other featured guests, it's important to provide a ready room for them that is close to the main room. Often, you'll set a table aside against a wall for sales, handouts and promotional materials. Also, any audio-visual equipment must be set up, tested



In the schoolroom setup, guests sit on one side of the tables, and aisles are left open between the tables.

and/or sound-checked in advance. Provide pitchers of water and drinking glasses at the tables. With locations, such as hotels and event halls that are used to hosting events, the site usually will take care of these items for you; however, you will always want to double-check.

When Space Is an Issue

There are a number of steps that you can take to save space if it is an issue for an event that you plan. One idea is to stagger guests to arrive for food at different times. For example, you could invite guests whose last names begin with the letters A through M for food between 6 and 8 p.m., while you might schedule guests whose last names begin with the letters N through Z to arrive between 7 and 9 p.m.

Another way to save space in areas not designed for large parties, such as homes, is to convert ordinary furniture and other items into makeshift tables. You can, in a pinch, change bookshelves, desktops and fireplace mantels into eating areas. You can stretch a board across ladder rungs, or place a couple of boards or unused doors on cinder blocks to make a buffet table. You might add card tables to the ends of tables, and use bathtubs to ice beverages. A creative imagination can do a lot to overcome space obstacles!

OK, now that you know all about seating arrangements, let's switch gears a bit and study service styles.

Service Style

Can you imagine an elegant, five-course meal that waiters in black ties serve to an amateur wrestling team—a team more in the mood for a down-home barbecue? Would you ask CEOs dressed in tuxes to eat Sloppy Joes at picnic table for an evening dinner? These extreme examples show how an event's service style needs to fit the event's purpose, mood and level of formality.

In many situations, your caterers, the staff at the facility that you choose or a banquet service that you use will provide wait staff and/or bartenders who have experience with the various service styles. Most caterers and event staff employ servers whom they have trained and are familiar with, and they will be able to competently meet your clients' food and beverage service needs. The caterers or staff may suggest a service style, or you might suggest one from the list that we're about to study. You should ask how the staff will dress to ensure the attire is appropriate for the event. If you plan an event around a theme, the wait staff may be able to provide costumes (though you should be sure to ask about additional costs for your request) or wear accessories that you provide (such as bandannas, clip-on earrings and eye patches worn above the eye for a pirate theme).

In the event that you need to hire wait staff and/or bartending personnel on your own, there are a number of resources at your disposal. You'll find two good resources for temporary wait and bartending staff in the phonebook: specialty service companies and temporary service agencies. The cost of such services varies quite a bit according to service style, reputation of the service provider and



Your event's service style should fit the event's purpose, mood and level of formality.

the area where the event occurs. For example, temporary staff will certainly cost more in New York City versus a small town in the Midwest. When you employ wait and bartending staff, be sure to ask if the cost includes tax and gratuities.

As you determine the size of the wait and bartending staff, be aware that every six to eight people at a sit-down dinner generally need one waiter or waitress. For cocktail parties, you'll need one wait-staff individual for approximately every 25 people, while buffet arrangements generally require one service person for every 20 guests. Bartending service is not generally as extensive—you'll require one bartender for approximately every 75 guests. If you need service personnel for social events, it is possible to locate help through restaurants, country clubs, colleges and other facilities. And, we include more cost-saving service tips at the end of this section.

Event	One waiter/waitress per
Sit-down meal	Six to eight people
Cocktail parties	25 people
Buffet meal	20 people

Get It on the Table—Popular Food-service Styles

A moment ago, we talked briefly about service styles. Now, let's get to the specifics. You will generally want to plan the service style in conjunction with a room setup appropriate for the event. The service style should fit the theme of the event (if it has one), as well as the space and budget available. Following are descriptions of the most common service styles for food.

Buffet Style

Most people are familiar with this help-yourself service arrangement. In the **buffet style**, guests pick up their plates and utensils at one end of the table and take the food that they want as they proceed down the table on one or both sides. Guests usually grab beverages from a separate table, or, when table seating is provided, the wait staff serves the beverages at the tables where the guests sit. This is the least-expensive service style. Should you use this style remember to place plates first, then the food, then utensils at the other end of the buffet.

Family Style

As the name implies, this the **family style** refers to how most people eat dinner at home with their families. The wait staff places the food at the center of the table, and guests pass it to one another.



In family-style food service, the wait staff places the food at the center of the table, and guests pass it to one another.

Russian Service

With the highly formal **Russian service** style, a trained wait staff serves the meal in a series of courses. The staff leaves a service plate before each guest, then, replaces it with a filled plate for each course of the meal. The staff generally serves food from the left of the guest and clears it on the right (unless the staff uses the left-left rule and serves and removes from the left). Beverages are served from the right, and the staff does not lift the glass from the table. The wait staff should use the hand farthest away from the guest, so that when to the left of the guest, the staff uses the left hand and vice versa for the right.

English and French Service

Both English and French service involve the use of platters. With **English service**, the wait staff either holds platters while the guests serve themselves or places the platters beside the guests at their table. With **French service**, the wait staff prepares and serves the food from platters.

Hors d'oeuvres and Appetizer Service

Hors d'oeuvres and appetizer service generally occurs in buffet style, silver-tray service style or in some combination of the two options. With appetizer buffets, guests help themselves to appetizers that the wait staff sets out throughout the course of the event. Finger foods are often best, though food that requires forks is becoming more common. With silver-tray service, the wait staff passes trays of hot hors d'oeuvres to the guests. If an event includes dinner, allow six to eight hors d'oeuvres or appetizers per guest. If the event is cocktails-only, 10 to 12 items per person is a good rule of thumb. Combined buffet and silver-tray service often works well for larger groups.



With silver-tray service, the wait staff passes trays of hot hors d'oeuvres to the guests.

Beverage-service Styles

Like food, beverages also have service options. In a later lesson, we'll discuss open, cash limited and non-alcoholic bar options. Three other options that you may want to use for event planning include *ticket-open bar*, *self-service bar* and *wait staff*.

Ticket-open Bar

With the **ticket-open bar**, the host or hosts issue a predetermined number of tickets or tokens to guests at the door to limit the amount of alcohol that each guest consumes. For example, if you plan a casino-themed party, your drink tickets could resemble playing cards or poker chips. Simply give each guest a certain number of cards or chips to exchange for drinks.

Self-service Bar

The **self-service bar** represents a kind of “buffet-style” approach to serving beverages. The facility sets up a table or bar with alcoholic and/or non-alcoholic beverages, glasses, coasters and napkins and encourages guests to help themselves. The facility should assign someone to periodically replenish the supplies (including ice for cold drinks) and clean up the beverage service area.

Wait Staff

Often, a facility handles beverages just the way a restaurant or lounge would. For the **wait staff** style, waiters and waitresses take and supply orders in a style appropriate to the event. You can easily combine open, ticket and cash bar procedures with this style.

A Few List Items

Facilities sometimes use three more basic beverage-service styles at events: *water and coffee*, *punch* and *afternoon tea service*. With simple **water and coffee** arrangements, the wait staff either pours beverages at the table or leaves water pitchers, coffee pots and teapots at the table. The staff simply refills the pitchers and pots as necessary. With **punch**, the facility usually places the punch bowl on a separate table, apart from the buffet table and other high traffic areas. Again, either the staff can pour beverages or the guests can help themselves.

The **afternoon tea service** involves a banquet table set with coffee at one end and tea at the other—or the facility might provide tea at individual round tables. The tea service should include a tray, teapot of tea, teapot of hot water to dilute the tea, creamer, sugar, sliced lemon and (optional) a tea strainer. Coffee service includes the pot of coffee, sugar and cream. The wait staff places cups and saucers to the left of the service trays, with teaspoons and napkins to the right. Trays of small sandwiches, cookies and cake are often served with small bowls of mints and nuts between the two services. It should be noted that a formal tea service requires a seated hostess at both ends of the table to serve guests.



The tea service should include a tray, teapot of tea, teapot of hot water to dilute the tea, creamer, sugar, sliced lemon and (optional) a tea strainer.

We’ve covered a lot of information here! We’re about to wrap up this section. But first, let’s talk about a few cost-saving tips for food and beverage planning.

Cost-saving Tips for Food and Beverage Service

Here are some tips that you might find helpful if you must plan food and beverage service on a tight budget:

- ❖ When you hire wait staff, consider an alternate source, such as a club, restaurant, hotel, VFW hall or nightclub. Careful, though—while these sources may save you money, they will also require more organization, as you will often have to instruct and coordinate the employees yourself or delegate another staff member for the task. For very large events, you may be able to generate service volunteers.
- ❖ Hire through a school. If you have a bartending, cooking or other appropriate vocational school in your area, consider hiring students-in-training. The school might also provide a coordinator for the staff it provides, and, as a side note, the students are often graded and receive credit, so they may be eager to do a good job.
- ❖ With beverages, see if it is possible to buy on consumption. Ask catering companies if you can pay only for beverages that guests consume rather than all of the items that the company sets out. This generally works best with canned or bottled beverages.
- ❖ See whether buying food by the piece would be cheaper than by the person.
- ❖ With liquor, purchase by the bottle. You will want to take an inventory before and near the end of the event. Also, consider purchasing “dead stock wine” left over from previous events.
- ❖ Use drink coupons or tokens to minimize excessive alcohol consumption at free bars.
- ❖ Finally, if you know and can anticipate the behavior of the group that you must serve, you can also save. For example, if there is a golf or tennis tournament around lunchtime and many of your guests are interested in the event, a lot of guests won't attend the lunch that you serve. The same goes for major televised events, like playoff games.
- ❖ This is taking a chance, but, if you are really in a financial pinch, remember that most caterers plan 3 to 5 percent above your guaranteed number of guests. If you keep this in mind, you can plan 3 to 5 percent below the number of guests that you expect when you give your guarantee. At conventions, conferences and other events, you can issue tickets for meals and get guests to make reservations ahead of time to give you a better estimate of the number that will attend.



Ask your caterer if you can pay for beverages that are consumed instead of all the items that are brought to the event.

Next, this lesson will explain the different decorating options that you have available as an Event Planner. But, first, complete the Practice Exercise that follows.

Step 7 Practice Exercise 5-2

For questions 1 through 5, choose the best answer from the choices provided.

1. **With rectangular banquet tables, you should allow at least _____ per guest.**
 - a. 18 inches
 - b. two feet
 - c. three feet
 - d. 30 inches

2. **When you organize the room setup, a _____ can be invaluable as you make your plans.**
 - a. seating consultant
 - b. sample set of tables and chairs
 - c. seating diagram
 - d. practice run

3. **If there are VIPs, guests of honor, organizational leaders, speakers or other honored guests at the event that you plan, it may be appropriate for you to have a(n) _____ set up for them.**
 - a. head table
 - b. special bar
 - c. extra large set of chairs
 - d. reserved wait staff

4. **When you plan the size of the wait and bartending staff, be aware that you'll need one waiter or waitress for every _____ people for sit-down dinners.**
 - a. two to three
 - b. six to eight
 - c. 10 to 15
 - d. 15 to 20

5. **The _____ style is the least expensive service style.**
 - a. French service
 - b. Russian service
 - c. family
 - d. buffet

For questions 6 through 8, answer the questions in the provided spaces.

- 6. Your client wants to limit the amount of alcohol that each guest consumes. Which beverage-service style would you recommend to him? Why?**

- 7. You and your client meet to discuss the room setup for an instructional workshop that you're organizing. Your client asks you the difference between conference style, hollow-square style and modified hollow-square style. How would you explain these seating styles to your client?**

- 8. Your client asks you how many appetizers per person he'll need to order for his event. What can you tell your client?**

Step 8 Review Practice Exercise 5-2

- ❑ Compare your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 9 Party and Event Decorations

- ❑ You thought that a sock-hop party sounded like an unusual idea for the annual office bash, but once you get there, you get in the spirit. The first thing you notice is the wait staff: The women wear ponytails with bobby socks and saddle shoes beneath their long poodle skirts; the men wear jeans with matching high-school-letter jackets and crisp white T-shirts. You watch them set the hamburgers, fries and Cokes (in 12-ounce bottles with red-striped straws) on tables with centerpieces composed of large ice-cream soda glasses. The glasses contain white carnations that resemble ice cream scoops and tiny, red carnations that look like cherries on top. The walls are adorned with more poodle skirts (these made of colored tissue paper), old 45-records, high-school pennants and posters of classic cars of the 50s. There's even a rented juke box in place of the office photocopier machine. To the right of the box stands a cardboard cutout of Elvis, to the left, Marilyn Monroe. As the evening ends, people hula-hoop and dance to the song "Flying Purple People Eater." Everyone has a wonderful time.

It's hard to say who more enjoys the atmosphere at a well-decorated party, the guests or the Event Planner who provides ideas and helps bring them to life. If you're excited about the creative possibilities that event planning offers, then you'll find this section especially interesting. Few aspects of this career use your imaginative resources like party and event decoration. You might find extravagant, expensive affairs a lot of fun with the freedom they allow for your ideas. But, you'll see that budget events are an enjoyable challenge, as well, as you brainstorm how to best use easily available resources. As you gain experience, you'll develop an ever-growing body of ideas to help you as you plan. However, for now, here are some tips to help get you on your way. Of course, you shouldn't think of this part of the lesson as comprehensive or carved-in-stone in any way. Instead, it's a springboard for your own creativity.

Table Decorations

Table decorations are a crucial part of almost any party or event. When a guest walks into a room, the tables are like little stages scattered around to draw one's gaze. What adorns the stage—the table coverings, centerpiece, place



A sock-hop theme came to life with the wait staff in costumes, theme-related food and appealing decorations and entertainment.

settings, glassware—forms an important element in how one perceives the atmosphere of the whole room. Indeed, at parties and events that aim for simplicity in decoration, table decorations may be all that is necessary to set the mood.

Let's look at different aspects of table decoration both in terms of traditional ideas and novel ones for unique or theme-oriented events.

Decorative Table Coverings

The first step to decorate a table is usually to cover it. Tablecloths, table runners and individual place mats are all options, but you'll probably use tablecloths most often. As you lay a tablecloth, it's a good idea to allow a 6- to 12-inch overhang. And, when it comes to colors, if you can use something other than standard white, you can plan a color scheme that goes with your party or event's purpose or theme. By the way, if you work with caterers or a hotel, you should ask what linen colors are available at no extra cost. Many facilities charge additional fees for certain linen colors because they don't carry them on the premises. Often, you will need to order special colors from a party-supply store or party-rental companies.



Check with your caterer or hotel to see what linen colors are available.

One way you can add a nice touch to your table covering is to layer different-colored tablecloths on top of one another. For rectangular tables, spread one tablecloth the way you normally would, and, then, spread another, smaller tablecloth with a pleasantly contrasting color or print over the first. You should place the corners of the smaller cloth within the corners of the table. For round tables, place a round tablecloth over the table first, with a smaller, square cloth on top.

You can use unusual materials to create a unique table. For example, it might be fun to have butcher-paper tablecloths with crayon sets at each place setting. Or, for a party with a maritime or aquatic theme, you can throw netting over a plain tablecloth. Other unusual tablecloth ideas include denim, burlap, chiffon or even cellophane or tinfoil for a futuristic theme party. Fabric stores have a variety of prints, such as paisley, camouflage and Hawaiian, that can add the right mood to your event.

As you plan your tablecloth, you'll need to consider your tablecloth/napkin color scheme, as well.

An Added Touch—Skirted Tables

If you want to add a decorative flavor to an event, consider skirting your head and serving tables. In general, **table skirting** is a pleated or gathered cloth attached to the table edge; the skirting usually hangs all the way to the floor. You'll put up table skirting after the tablecloth or other table covering, and you might layer it or adorn it with ribbons, flowers, etc., for an especially decorative look. You can buy pre-gathered skirting commercially in cloth or plastic and attach it with pins, thumbtacks, Velcro or

commercial plastic and metal fasteners. You can also use pearl corsage pins for an elegant touch. Or, you can gather or pleat the skirt yourself with a tablecloth and one of the same kind of fasteners that we just mentioned. (A one-half-inch pleat works well for a full, gathered look, while two-inch pleats create a flat, pleated appearance). Another method is to use tape and paper tablecloths available at party and stationery stores. You should never skirt the sides of tables where guests will sit or where the skirt might interfere with your guests' legs.



Skirted tables and chair covers are decorative details that can make your event more elegant.

Chairs

Decorative touches for chairs are also quite popular. Many event sites offer colored chair covers that you can decorate with ribbons. In addition, you can decorate chairs with balloons, flowers, ribbons, cutouts or anything else that you can think of!

Placemats

You can use placemats in some situations—for example, if you have an especially attractive wooden banquet table. You'll usually use placemats instead of tablecloths, but, with informal table settings, you will sometimes put placemats on top of tablecloths. You can purchase a wide variety of placemats at commercial outlets, or you can make them easily at home. You can use nearly any material for a placemat, including unusual items, such as burlap, doilies, oriental bamboo or clear glass. For some parties, you may want to use novelty placemats, such as ones made from posters, maps, felt hearts, record covers, flannel or construction paper cut into almost any shape—your imagination is the limit!

Centerpieces

If a table is a stage at a party or event, then the centerpiece is the star of that stage. Centerpieces naturally draw the eye and establish a mood or theme. Even a party with a very small budget for decorations should have centerpieces of some kind. With some creativity and resourcefulness, you can buy or create effective but inexpensive centerpieces.

The range of possibilities for centerpieces is limitless, but here are some ideas from the traditional to the unusual to help you get started.



Flowers are the most popular centerpieces, and they can add a beautiful touch to party and event decorations.

Floral Arrangements

Floral arrangements are the most popular centerpieces, and they can add a beautiful touch to party and event decorations. If you can afford it, you may want to hire a professional florist and take advantage of her or his expertise. A florist can add expense to your budget, but it's convenient and saves time.

Florists are also often great sources of floral ideas for themes and color schemes at your party or event, but don't be afraid to use your own ideas, too.

It's an art to design floral arrangements, but you can do it yourself. You can get a wholesale license to purchase flowers at wholesale. Even a few flowers in a vase add an elegant touch to an event. If floral arrangements interest you, you may want to consult one of the many books on floral designs for other tips.

Baskets Are the Start of a Great Centerpiece

Another fantastic idea for centerpieces—both traditional and novel—is to start with a basket and build from there. You can choose from many varieties of baskets—wicker, ceramic, paper and cloth, for example. Baskets range in shape from traditional to unusual shapes, such as animals or other objects. Baskets are popular, you can easily find them at your local department store, discount store and arts and crafts store or garage sales and flea markets.

As you think about the right basket for your centerpiece, consider how you want to fill and/or decorate it. You can paint baskets to complement the filler inside and decorate them with ribbons, bows, ballroom bouquets or cloth napkins tied to the handle. Also, you may want to line your basket with tissue paper, cellophane, cloth napkins or other materials before you fill it. Nearly anything makes a good basket filler, and it's particularly easy with basket arrangements to suit a party's theme, such as Lifesavers for a nautical theme or small toys and candy for a children's party.

Candles

Candle arrangements can make excellent centerpieces alone, or they can complement almost any other centerpiece arrangement. You'll usually use candles for evening functions, but you might occasionally use them at breakfast settings to add a special touch. Draw on the color of the candle to further enhance the table color scheme, or use the style of candleholder to add a special touch. In addition to the traditional candle holders available at department stores, discount stores, party-supply stores and elsewhere, you can create your own candle holders from ordinary objects to add to the party's theme or mood. For example, wine bottles or small gourds both make good candle holders.

Keep in mind that candles will benefit any room that isn't as bright as you want. Check with your hotel to see if it has candle hurricanes or mirror squares that you can place under candles. Some facilities will let you borrow these items for your event.

Balloons

Plain, fancy or professionally tied and designed, balloon arrangements make fantastic decorations for centerpieces and elsewhere in the room whether the event that you plan is a children's party or an elegant dinner and dance affair.



If you decide to blow up and tie your own balloons, allow extra time.

Balloon design is a booming business in many regions, and you can often find decorators in the yellow pages or through referrals. Your caterer or site facility staff can also often arrange for balloon decoration. CBAs, or certified balloon artists, really add creativity and style to any event.

If you want, you can make your own balloon designs and arrangements. You'll need to buy or rent a helium tank to do this. If you do decide to blow up and tie your own balloons, be aware that although it can save you money, it can consume time and be a bit of a hassle. After all, balloons pop easily during transport, and their strings tend to intertwine and tangle. If you can afford a company to deliver the balloons, you'll usually save time for other details.

When you use latex balloons as centerpieces, you'll tie them to dowels and place them in vases or other containers. You can also tie balloons into animal or other shapes and put them directly on the table for centerpiece arrangements. Tie washers to balloon strings to weigh down the balloons, or you can tie down balloons with baskets, bags of rice covered with fabric or other theme-oriented objects. If the balloons float from the table on strings rather than rest directly on it, be sure that the strings are long enough so that the balloons float above the eye-sight of the guests and don't interfere with conversation. Finally, a skilled balloon designer can tie balloons into large, elaborate shapes, such as clowns or animals, for a festive centerpiece sculpture.

Centerpiece Possibilities are Endless

Flowers, baskets, candles and balloons aren't the only items that make great centerpieces—far from it! With the right theme or setting, you can use a variety of objects effectively in centerpiece design. For theme parties, consider objects around the house, at garage sales or from second-hand stores.

One idea is to use unusual items as substitutes for or in conjunction with flower arrangements. Some flower-like centerpiece items include pinwheels, paintbrushes, evergreen branches with bows, paper flowers or origami, colored uncooked pasta, candy and almost anything colorful on a dowel. You can also try unusual objects as vases for a novel touch, such as paper hats, watering cans (perhaps with ribbons "pouring" from the spouts), champagne glasses with marbles at the bottom, wooden shoes with tulips, beer steins, fruit jars with wildflowers, movie popcorn boxes, cookie jars, cowboy boots and nearly any other container you can think.

You might even break away from tradition completely with just about any kind of theme-related object as a centerpiece, either on its own or in combination with some of the ideas that we just mentioned.

A final note about table centerpieces: Whatever type of centerpiece you choose, it should lend to conversation at the party or event, not obstruct or distract from it. For this reason, ensure centerpieces at guest tables are well below eye-level—unless the centerpieces are transparent. At buffet tables, in contrast, you'll often place centerpieces on a pedestal made from Styrofoam, a box or a telephone book with a cloth draped over it to elevate them.

Individual Place Settings

Individual place settings work well in conjunction with a table centerpiece, or, especially with small tables, as a substitute for a centerpiece. You can decorate each individual place setting with a nice touch, such as a single flower or a votive candle.

Now, let's talk about how dishes, flatware and glassware influence an event.

Dishes, Flatware and Glassware

Choose dishes, flatware and glassware appropriate for your event. China and appropriate flatware and glassware add a nice touch even to casual events. However, these days, you can find high-quality paper and plastic dishware, as well. Most caterers charge extra for the use of china, glass and silverware, but, depending on the event, the charge may be worth it. A lot of caterers rent the china, dishes and linens from a rental company, but you can rent the items yourself, if you wish. If you choose paper and plastic, consider designs and colors that go with the event's mood or theme. One situation in which you might find paper and plastic particularly appropriate is for outdoor events on cement or near a pool.



You can rent china, dishes and linens from a rental company, or use a facility's dishes if available.

You can decorate dishes, flatware and glassware. For example, place bows and flowers on plates or upon the flat base of upside-down wineglasses. Or, tie a ribbon around the plate, the stem of a wineglass or the flatware. For buffets, you can fan out the flatware into decorative shapes, or place it in a unique container to fit the theme of the event. You might also use unusual items for plates and glasses to suit an event's theme.

Napkin Folds and Napkin Rings

A beautiful napkin fold turns an already nice table arrangement into something truly fabulous. With simple table arrangements, napkin folds and/or decorative or unusual napkin rings really bring the table arrangement together. There are a multitude of napkins folds—including fans, knots, swirls and many others—that you might find appropriate for different table arrangements. To learn about them, including how to fold them yourself, purchase one of the many napkin-fold books available from large bookstores or party-supply stores. Some Event Planners consider these books and the skills they impart an essential part of their event-planning repertoire.

Place Cards

Place cards are a great way to personalize the place setting and let each guest know that he or she is expected and welcome. You should center the place card at the top of the plate, or, for more informal occasions, on top of the napkin, sticking out of the stemware on the napkin folded there or on the plate itself.

One great idea for place cards is reusable china place cards and nonpermanent ink markers. Often Event Planners own one or more sets of these. Disposable cards also work well, often in conjunction with calligraphy or electronic or manual label makers. Many printers and computer word-processing programs offer this option. Most stationery and paper copy stores usually perform the service, as well. Remember that you can coordinate different font styles with your theme to help the place cards fit the tenor of the party or event.

When you use place cards, prepare for changes in the guest list. Have extra place cards available to add names. Place a party favor or other decorative item next to a place card to make it extra special. Another great idea is to use unusual or theme-related items as place cards. You can write or attach your guests' names to any number of items, from paper flowers to candy bars.

So, you set up enchanting table decorations for the party, replete with stunning centerpieces, beautifully matched layered tablecloths, individual votive candles at each place setting and elegant place cards for all. All of the tables—the little “stages” aligned throughout the room—look marvelous. But what about the rest of the room? Well, our next section focuses on whole-room decorations that you can use to further set the atmosphere for parties and events that you plan.



Personalize a guest's place setting with place cards.

Decorate the Whole Room

What follows are tips for use of balloons, streamers, lighting and other whole-room decorations. You can decorate not only the walls and ceilings, but windows, doors, staircases, pillars, fireplace mantels and almost anything else in the room! However, be sure to plan your whole-room decorations to the size of the room that you decorate. You don't want to clutter a small party or event room with too many items.

At the end of this section, you'll find some tips for outdoor decorations, as well.

Balloons



Balloons make great whole-room decorations.

You already learned about decorative balloons in the section on table decoration, but balloons make great whole-room decorations, too. You can use balloon colors that enhance your overall color schemes, or, for a fancier effect, you can place smaller, solid-color balloons or confetti inside larger, clear balloons. (However, be sure to check with the site manager first to see if the facility allows confetti.) Here are some other ideas for balloon decoration for the walls, ceiling and elsewhere:

- ❖ Place balloon clusters at the center and corners of your streamers to enhance ceiling designs. Or, let helium balloons floating about the ceiling. (Just make sure the balloons' tails are above the head level of the guests.)
- ❖ Create balloon wall-clusters. Tie groups of balloons together in decorative designs and hang them on the walls. You can weave ribbons, streamers, paper cutouts or other items into the balloons, or use the balloons to ornament a poster or theme-oriented cardboard cutout.

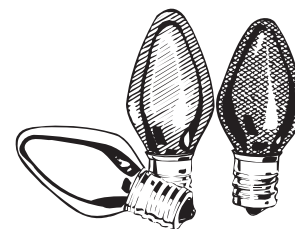
- ❖ Have a balloon drop! Balloon drops are appropriate for more than just the New Year's Eve countdown. Hang balloons from special balloon drop bags or nets, and release them at that special moment during your party or event.
- ❖ Make a balloon archway. Create an arch of balloons at the entrance to a party as a festive welcome for the guests.
- ❖ Use a unique balloon prop. You can make balloons into party props yourself, or you can hire a balloon artist to tie balloons into just about anything from flowers to race cars to jungle animals.
- ❖ Scatter balloons at random. This lends a nice informal touch to a party. Some of the Mylar balloons available resemble animals or characters and have weighted legs that actually make the balloons appear to walk. Note that balloons and streamers aren't the only things that you can use to decorate ceilings. Try flags, mobiles, toys or theme-oriented cutouts that hang from strings.

Hang Around—Other Decoration Ideas

You don't need to stop with balloons. Especially for theme parties, you can adorn the walls with any number of original items to add to the atmosphere—from sporting equipment to masks to road signs. Let your imagination and your event's theme guide you!

Let There Be Light (and Special Effects) at the Event

Good lighting can go a long way toward setting the mood for parties. Illuminate the guests with lighting around the dance floor, or place lights under tables for an under-glow effect. You can purchase paper globe lanterns, or use luminaries with battery-powered lights inside for a lighting effect. Additionally, Christmas lights are an inexpensive way to establish festive lighting for any occasion, and you can use specialty lights, such as black lights and strobe lights, for dance parties. If you want to put these types of lights to work for you at an event, allocate enough time to plan and install.



Christmas lights are an inexpensive way to establish festive lighting for any occasion.

For Halloween, dance parties and other occasions, dazzle the guests with some inexpensive special effects. Try strategically placed fog or smoke machines, or, for a touch of levity, turn on a bubble machine during a special novelty tune (for example “Tiny Bubbles” at a Hawaiian party). For an extra-special effect, combine a fog machine with colored track lighting. Don't forget that many facilities that provide a stage can also provide lighting to enhance your event.

Special lighting is now a very popular decorating tool for any type of event, not just a Halloween party. Many audio-visual companies even specialize in decorative lighting or “light shows” that can brighten any sort of gathering—from a meeting to a party. Let these professionals help you with the events that you plan!

The Theme Party

One way to brainstorm decorating ideas for your theme party is to think of the party room as a stage, and make it fit the theme as closely as you can. From circuses to castles, space crafts to ghost towns, the possibilities are endless. You can get great ideas from theater books on scenery and from picture books that portray the place or time of your party's theme. From there, you may want to use props to build a stage set. If you have the time and energy, you can do it yourself, or, if you have the budget, hire a professional stage designer or one from the theater department at your nearest college. For a truly realistic setting for a theme party, host your event "on site" at an actual location. Amusement parks, zoos, casinos, caves, skating rinks and lighthouses are among the innumerable sites that can ideally suit a theme party.



Amusement parks, zoos, casinos, caves, skating rinks and lighthouses are among the innumerable sites that can ideally suit a theme party.

Outdoor Décor

If the party that you plan is outdoors, there are some different opportunities and limitations for you in terms of decorations. While table decorations are largely the same for outdoor parties, whole-room decoration is obviously not possible. Still, there are a number of ways that you can spruce up an outdoor environment to fit a theme or give the party special flair. For instance, if there is a pool or pond nearby, float flowers or candles on the water. Decorate a volleyball net or a badminton court with flowers or balloons. You can also bring in a hay wagon for an "olde tyme country party" or use garden gnomes, figurines and toadstools for a fantasy effect. Let the space be your canvas! Remember, you can also decorate entranceways and parking lots outside an indoor event.

As you brainstorm outdoor decorating ideas, consider the wind. You don't want to spend time and energy decorating your event's outdoor site only to have Mother Nature blow away all of your hard work.

We are about to wrap up this lesson on event details. However, before we do so, let's talk about some tips to save you money as you decorate for an event, as well as take a look at a checklist that you can use to organize your decorative ideas.

Cost-saving Tips for Event Decorations

Decorations don't have to be expensive to make an impact. Here are some cost-saving tips for event decorating on a budget.

- ❖ If an event has a tight decorations budget, focus on the table centerpieces. With a centerpiece, you can bring to life the standard linens that caterers or site facility staff members provide. In fact, the centerpiece is often the most attention-grabbing part of any decorative arrangement.
- ❖ If your clients want to have a theme party but are flexible about the type, organize the theme around decorative items to which you already have access. You can sometimes save decorative items to store and use for future parties, though this depends on the contracts that you have with your clients.
- ❖ Make it a habit to frequent import stores, garage sales, Web sites, yard sales and flea markets, and keep your eyes open for inexpensive items that you will use in the future. But be careful as you develop your own inventory. Don't make major investments in items that you aren't sure you'll use.



Make it a habit to frequent import stores, garage sales, Web sites, yard sales and flea markets, and keep your eyes open for inexpensive items that you will use to decorate events in the future.

Decorations Planning List

Once you determine the tone and purpose of the event, you can make a decorations planning list that includes the details for the decorations. Again, you may need to alter the form that follows to meet your particular needs, or you can use it as is.

Decorations Planning List	
Entrance decorations:	<u>A red, white and blue balloon archway</u>
Room decorations:	<u>An American flag behind the podium; red, white and blue lighting projected on north and south walls</u>
Table and/or chair decorations:	<u>Red- and white-striped tablecloths; "founding-father" plaster busts.</u>
Food table decorations:	<u>Busts and stars and stripes trays; fruit display</u>
Guest-of-honor table decorations:	<u>Red, white and blue flowers; striped tablecloth</u>
Guest table decorations:	<u>N/A</u>
Individual place setting décor:	<u>Blue, star-shaped place mats; holiday candy</u>
Party favors:	<u>Candy; sparkler packets</u>
Signs to direct guests to site:	<u>In the shape of a U.S. map</u>
Other decorations (parking lot, restroom):	<u>Balloons; U.S. maps</u>

Aside from a description of the decorations, remember to list any materials that you need to purchase or borrow. Talk to your outside sources, such as the entertainer or caterer, to see if he provides any of his own supplies, such as special lighting, linens, decorations or dishes.

You can find this form in your student forms organizer, as well. Now, let's review what we learned in this section with the Practice Exercise that follows.

Step 10 Practice Exercise 5-3

□ For questions 1 through 6, choose the best answer from the choices provided.

1. **As you lay out a tablecloth, it's a good idea to allow a _____ overhang.**
 - a. three- to six-inch
 - b. six- to 12-inch
 - c. two-foot
 - d. floor-length

2. **_____ is a pleated or gathered cloth attached to the table edge; it usually hangs all the way to the floor.**
 - a. Table skirting
 - b. A tablecloth
 - c. A curtain
 - d. Napkin folding

3. **Whatever type of centerpiece you choose, it should _____.**
 - a. always be on a pedestal
 - b. never use balloons, but rather flowers and candles
 - c. lend to conversation at the party or event, not obstruct or distract from it
 - d. always be skirted with its own special cloth

4. **_____ are a fantastic way to personalize the place setting and let each guest know that he or she is welcome.**
 - a. Placemats
 - b. Individual votive candles
 - c. Napkin folds
 - d. Place cards

5. **As you think about the right basket for your centerpiece, consider how you want to _____.**
 - a. match the color of the carpet
 - b. fill and/or decorate it
 - c. use the basket later
 - d. serve the food

- 6. Even an event with a small budget for decorations should have ____.**
- a. skirted tables
 - b. chair covers
 - c. balloons
 - d. centerpieces

For questions 7 through 8, answer the questions in the provided spaces.

- 7. You help your client plan a Halloween party. What are two lighting suggestions that you offer your client?** _____

- 8. Your client will hold an elegant ball in February. Suggest three centerpiece ideas.**

For questions 9 through 13, read the following scenario and then answer the questions.

This morning, you met with a new client who has hired you to plan a retirement party. Bill and his wife Betty will retire in May and want to celebrate with family and friends. Both Bill and Betty want the party to have a golf theme because that's what they'll do once they retire.

- 9. Based on the theme of the party, what are two location ideas that you can give Bill and Betty?** _____

- 10. Based on the event size and budget, Betty and Bill chose a location. Now that you're meeting with the site manager, what are two questions you'll ask?**

11. Once the site manager creates the contract, you usually check it. List two items that you check the contract for. _____

12. Now that Bill and Betty have a contract, they need to determine the food service. Neither are familiar with English service or buffet style. How would you explain English service and buffet style to Bill and Betty?

13. Betty and Bill have asked you for some decoration ideas that use their golf theme. What are three ideas that you give them? _____

Step 11 Review Practice Exercise 5-3

- Compare your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 12 Lesson Summary

- With this lesson, you came a long way toward turning your clients' party and event dreams into a reality. You studied the ins and outs to secure the right location for an event. You know where to find specific sites, when and why to visit sites, how to work with site managers and how to establish the kind of contract that you want. You really know your site options!

You also learned the details of food and beverage planning for parties and an event, which means you'll work successfully with caterers, plan perfect seating arrangements, and select an appropriate service style for both foods and beverages as you plan an event. Finally, you read a lot of tips and guidelines for party and event decoration. You studied the importance of table decorations, including table coverings, centerpieces, place settings, place cards and other details. Plus, you learned about whole-room decoration, from balloons to a variety of tips for theme-oriented or unusual party décor. And, with each of these topics, we provided a number of cost-saving tips that will work for you. You should feel good about your expanded expertise!

In the next lesson you'll learn to select and book speakers and special guests for your client's event and how to promote your event. However, before we move on to those topics, complete the quiz that follows. Although you may use your lesson book as you complete the quiz, now would be a good time to review any material that you found confusing and contact your instructor with any questions that you might have.

Step 13 Mail-in Quiz 5

- ❑ Follow the steps to complete the quiz.
 - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
 - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
 - c. When you've finished, transfer your answers to the Scanner Answer Sheet included. Use only blue or black ink on your Scanner Answer Sheet.
 - d. **Important!** Please fill in all information requested on your Scanner Answer Sheet or when submitting your quiz online.
 - e. Submit your answers to the school via mail, e-mail, fax or, to receive your grade immediately, submit your answers online at www.uscareerinstitute.edu.

Mail-in Quiz 5

For questions 1 through 20, choose the best answer from the choices provided.

1. **When you plan an event, your first major decision in the planning process is usually to choose a(n) _____ for the event.**
 - a. entertainer
 - b. caterer
 - c. location
 - d. decorator

2. **When it comes to sites for your party, _____.**
 - a. be sure to limit your choices to conventional sites
 - b. sign the contract to book the site right away—even before you consult with your client
 - c. it is not necessary to visit a site before you book it
 - d. consider the site location

- 3. Be sure to make contact with the official in charge of a site ____.**
 - a. sometime before you book the site
 - b. as soon as possible
 - c. after the event concludes
 - d. when you sign the contract

- 4. The best contract is one that ____.**
 - a. pleases both the site facility and your client
 - b. makes you the most money
 - c. pleases your client alone
 - d. requires no negotiation

- 5. Which of the following might make a site visit more productive? ____**
 - a. Draw pictures of the site.
 - b. Always visit the site during the day, even if your event will occur in the evening.
 - c. Avoid the site manager until it is time to sign the contract as he or she will only bother you with a lot of questions.
 - d. Obtain a floor diagram of the site.

- 6. Buffet arrangements generally require one service person for every ____ guests.**
 - a. 6 to 8
 - b. 75
 - c. 20
 - d. 25

- 7. When you plan the room setup, a ____ can help you to make your plans.**
 - a. seating diagram
 - b. sample table
 - c. featured entertainer
 - d. centerpiece

- 8. Which service styles require a highly trained wait staff? ____**
 - a. Russian and French service
 - b. French and buffet service
 - c. English, buffet and family-style service
 - d. Russian, French and English service

- 9. This style represents a kind of “buffet-style” approach to serving beverages. _____**
- a. Ticket open bar
 - b. Self-service bar
 - c. Wait staff
 - d. Afternoon tea service
- 10. Most caterers plan _____ your guarantee.**
- a. 3 to 5 percent above
 - b. 10 percent above
 - c. 5 to 7 percent above
 - d. 4 to 6 percent below
- 11. As you plan your tablecloth, consider your _____.**
- a. carpet color
 - b. wall color
 - c. tablecloth/napkin color scheme
 - d. service style
- 12. Table skirting is put up _____ the tablecloth or other table covering.**
- a. before
 - b. after
 - c. inside
 - d. on all sides of
- 13. Candle arrangements _____.**
- a. with unique candleholders might add a special touch to an event
 - b. do not make good centerpieces alone
 - c. must only include votives
 - d. should never use anything for candleholders other than traditional candleholders due to the risk of a fire
- 14. You’ll usually use candles for _____.**
- a. luncheons
 - b. buffet centerpieces
 - c. evening functions
 - d. VIPs

- 15. One way to conceive decorations for a theme party is to think of the party room as a ____; try to make the room fit the theme as closely as you can.**
- centerpiece
 - book
 - spotlight
 - stage
- 16. Once you determine the tone and purpose of the event, you can make a ____ that includes the details for the decorations.**
- decorations planning list
 - contract
 - drawing
 - seating chart
- 17. When you create a ____, it's important to consider traffic flow, or how the guests will move throughout the event.**
- guarantee
 - strike
 - seating diagram
 - contract
- 18. When you consider traffic flow, ____.**
- remember that it is probably one of the least-important parts of any event
 - make sure that centerpieces are at guests' eye level
 - know that it is OK to put bars or other gathering places close to entrances
 - think about how people will move in and out of aisles, or reach a stage or dance floor
- 19. ____ now a very popular decorating tool for any type of event, not just a Halloween party.**
- Special lighting is
 - Jack-o-lanterns are
 - Russian service is
 - Balloons are
- 20. If the event you plan has a tight decorations budget, focus on the ____.**
- table linens
 - table centerpieces
 - lighting
 - napkins

CONGRATULATIONS

You've completed
Lesson 5.



Don't wait for your quiz results to continue with Lesson 6.

Speakers, Sponsors and Teamwork

6

Step 1 Learning Objectives for Lesson 6

- ❑ When you have completed the instruction in this lesson, you will be trained to do the following:
 - ❖ Explain how to select and book speakers and special guests for your client’s event.
 - ❖ Describe how to locate sponsors to support the event.
 - ❖ Promote or market any event creatively and effectively.
 - ❖ Explain how to incorporate a theme into your event.
 - ❖ Describe how to effectively work with volunteers and committees.
 - ❖ Access how to coordinate and troubleshoot on the day of the event.

Step 2 Lesson Preview

- ❑ Event Planner Cynthia Ross has been planning a fundraising event with a large local bookstore, Wordsworth Books. John Hansen, the manager of the bookstore, came to Cynthia and hired her to help plan a special event. The purpose was twofold—to raise money for a local homeless organization and to draw people into the store.

Cynthia suggested using a literature theme for the invitations and decorations, with images of houses or books that looked like houses. Together, they came up with the motto “At Home with Words.” Cynthia then presented John with a design for the event. John said he would ask a few of his employees—those he knew were interested—and a representative from the homeless organization to be on the planning committee. Cynthia then met with the committee. The representative from the homeless organization gave a short presentation



Cynthia is planning a fundraising event with a large local bookstore to benefit a homeless organization.

about the homeless problem in the city and what his organization was doing to make it better. He thanked everyone for their involvement, and the committee discussed all the details of the event. Cynthia delegated responsibilities, and they came up with a schedule of when they would meet.

Cynthia thought that in addition to charging \$20 per person for entry to the event, they might raise money with an announcement that 20% of all book sales that day would go to the organization, and get local businesses to sponsor the event. In exchange for printing their names on the programs, sponsors will be offered free advertising on bookmarks or mugs, or they will be asked to sponsor particular things for the event, such as coffee or the fees for the speakers. Cynthia wrote and sent letters to local businesses explaining the purpose of the event and the levels of sponsorship. As part of Cynthia's follow up, she called a gourmet coffee shop located across the street from the bookstore, and asked them if she could meet with the manager to discuss sponsoring the coffee for the event. They were glad to be able to help the cause and were happy about the advertising on mugs that they would receive in exchange. In addition, a representative from the coffee shop joined the planning committee.

At the next meeting of the planning committee, Cynthia served fruit, cheese and crackers as they discussed marketing strategies and who to invite. The committee made up an "honored guest" list that included the mayor and other important members of the community. The staff made the invitations out of parchment paper, on which a sketch of an old book had been color copied. The employees handwrote the invitations, which gave them a personal touch and a kind of "old world" charm. The event was more than two months away, but Cynthia knew that sending out the invitations far in advance is important for event planning in order to give the guests plenty of time to plan ahead. The committee discussed sending other invitations to everyone on the bookstore's mailing list, the homeless organization's mailing list, the university in town, and others. They brainstormed ideas for a flier, and one member, who had experience with graphic design from the bookstore's advertising campaigns, volunteered to design it and the bookmarks. The committee agreed that the fliers and bookmarks would be shaped like houses and read "At Home with Words."



Cynthia's event committee met to create a guest list, create invitations and brainstorm flier and bookmark ideas.

Cynthia knew she would have to find a special guest, perhaps a writer, who would really make the event special. She called the English department at the university to inquire about local writers she could hire for the event. She also asked John and some other employees at the bookstore for their input. They decided to ask a few of local writers rather than one "big name," and Cynthia called them to invite them to read their work at the bookstore event. The writers were excited and flattered about the opportunity. Cynthia already had another sponsor who would offer each of the five writers a small honorarium in exchange for being mentioned as a speaker/sponsor in all advertising. In addition, the writers would sign books and their books would be displayed.

Cynthia gave the writers the date, time and location. In addition, she made a note to e-mail the event details and send a hard copy of the invitation with directions.

Soon, fliers for “At Home with Words” were up all over town, local businesses were displaying them and giving away house-shaped bookmarks with the time and date of the event, and the local newspaper had run a story on the upcoming event. Everyone on the committee was excited about the big day to come—every member had heard someone talk about the upcoming reading. They were even talking about making it an annual event. As an Event Planner, Cynthia knew how to involve people in an event and get them excited. The day of the event came. Over a hundred people attended, \$3,000 was raised for the homeless organization, and the store’s sales went up dramatically. The writers who were the special guests gave impressive performances and got their work out to a wider audience. Everybody benefited!

This fundraising event is just one example, but most any event that an Event Planner organizes will involve locating speakers, special guests or entertainment; soliciting sponsors and informing people know about the event. Your goal is to make a splash! How do Event Planners coordinate speakers, sponsors, marketing and promotion for social and business events? What makes a party or event special? What do guests remember about the event? These are some questions you, the Event Planner, will ask yourself when planning events, whether they are children’s birthday parties, community events or large corporate events. You may be able to plan and carry out the event on your own, but most often you may need to recruit help in the form of committees and volunteers. In this lesson, you will learn how to make decisions about speakers, special guests, and entertainment. You’ll learn how to find sponsorship and market the event effectively. You’ll also learn about your role on the day of the event and how to troubleshoot.

Step 3 The Talk of the Town—Speakers, Special Guests and Entertainment

- Part of your job as an Event Planner is to assess the event’s purpose and tone when you choose a speaker or special guest. The speaker should always reflect the purpose of the event. The writers at the fundraising event Cynthia planned were ideal for that event. But writers might not have been appropriate if the event was an employee-training event, for example. Your job is to assess the event’s purpose, and come up with ideas about who should speak or entertain. Your client may already have ideas about who he or she wants at the event, and in that case, your job is to research out that person or group and hire them via contract. Either way, your job is to secure the appropriate speaker, special guest or entertainment most fitting for the event.

Speakers

Professional speakers are people who are trained or experienced in public speaking. They can include professors, managers, directors, scientists, teachers, trainers, researchers and other professionals who know their topic well and are asked to speak because of their knowledge. Professional speakers could also be people who are part of the organization and who present a welcome or thank-you speech to a group. Keynote speakers are often well-known people who provide a motivational welcome to the event. Speakers also may offer educational workshops during an event.



Professional speakers are trained to speak publicly.

Special Guests

Special guests are those people who appear because of their personas. They include politicians, celebrities, writers, poets and other public figures. Special guests may be “guests of honor” who simply circulate among guests and sometimes have their pictures taken with guests.

Entertainment

Entertainers are those people who have artistic talent and are asked to entertain guests. They include singers, musicians, artists, actors, clowns, magicians, comedians and dancers.

Speakers, Special Guests and Entertainment

As you know, social events can include holiday parties, engagements, anniversaries, baby showers, birthdays, graduations, wedding showers, conferences, training programs, retirement parties and weddings. Entertainment for social events may include musicians, magicians or any other person whose main function is to entertain. If a retirement party is casual, but meant to be meaningful to the guests and the guest of honor, make sure you understand the purpose so you don't end up hiring a magician or clown who usually performs at children's birthday parties. Consult with your client and, if you can, meet the guest of honor, or some of the guests, so you get an idea of the type of people you're planning the event for. This will help you establish the tone. You should try to keep the goal of the event in mind and carry it through the decorations, activities, and food as well as the speaker or special guest. Remember, there is always room for creative play. Your client may want a fancy sit-down dinner, but entertainment that is more casual and fun, such as a magician or a mime.

A speaker or special guest can enhance the event by offering a main attraction that relates to the specific event. Guests are entertained as they celebrate, and they have something to remember the event by. You will book a speaker, special guest or entertainment that is appropriate for a specific social event. This is not difficult when you listen to your client and determine the purpose of the event. Social events (and sometimes business events) will usually have entertainers who play music, sing, do magic tricks, tell jokes, draw caricatures or perform impersonations. It probably wouldn't be appropriate, for example, to have a local politician deliver a speech about America at a baby shower, right? Common sense will generally guide you when you choose speakers, special guests and entertainment.

Speakers, Special Guests and Entertainment for Community and Corporate Events

Corporate events can include conferences, luncheons, company picnics, employee reunions, fundraisers, grand openings, promotion parties, team-building events, employee-of-the-month parties, training and development sessions, inaugurations, arts festivals and special-area events such as stock shows. Community events might be walk-a-thons, sidewalk sales, organized runs, fairs, farmers markets, summer theater or dance workshops, etc. Corporate events center on employees and, like community events, often involve fundraising, education and entrepreneurship. The purpose of business events may lean more toward the serious side, though this is not to say that the events can't be fun. Some community events are often planned and carried out with an air of fun, though both corporate and community events are often quite serious about sponsorship and promotion. Corporate-event purposes may tend to be more focused than social events, with objectives ranging from education to increasing sales. Community events are often sponsored by local businesses, so even community events serve the business community in terms of advertising and promotion.

As an Event Planner, you will be involved with the business-event client in the same way as with the social-event client in terms of determining the purpose of an event. When you choose a speaker, special guest or entertainer, you'll want to target your audience. As you can imagine, you have many special guest and entertainment possibilities, and your task will be to narrow down those possibilities when dealing with clients.

As with the client who wants to plan a social event, a corporate-event client may have someone in mind for the event, someone who has something important to say in relation to the purpose of the event. On the other hand, corporate and community events can be more social, like Cynthia's bookstore event. But even in the case of the bookstore event, John had a purpose in mind that would also ultimately benefit the store. In the same way, corporate events have a more focused purpose that has to do with the business itself.



As you choose a speaker, special guest or entertainer, make sure you target your audience.

Though the private business event is sometimes celebratory, it also has the benefit of bringing management and employees together, or improving communication between them. If the client has someone in mind to speak at the business event, it will be your job to secure that speaker in the same way you would do for the social event's speaker. You contact the speaker and agree upon a contract, get everything in writing, follow up and follow up again.

The speaker can enhance the event by offering information or entertainment relevant to the event. This is especially important regarding training or development sessions. The training or development session's main purpose is just that: to train employees in new skills and develop existing skills. The speaker is especially important to these events. You may have some ideas regarding the speaker, but management will usually have someone particular in mind. If the event is a bit more casual, you may need to hire both a speaker who will deliver a talk on something relating to the business and someone who can provide light entertainment as well. Light entertainment is a trend in business events, but whether to hire a clown for a training session will depend on the client and the event. For corporate and community events, you can look to other businesses, local schools, churches, the military or the retired community for speakers who may be appropriate for the event.

Locate Speakers, Special Guests and Entertainment

Of course, not every event you plan will have a speaker, special guest or entertainer. But if your client wants one and doesn't have a particular speaker, special guest or entertainer in mind, you will need to conduct research and find one. For both social and business events, you have a lot of resources for speakers, special guests and entertainment. To find speakers or special guests, first look in your community for people who have professional or personal experience in an area that relates to your event. Network—in other words, ask everyone you know about speakers and special guests they know of from attending other events. Perhaps there is a local Speaker's Bureau in your area that can provide you with some options, too. Below are some suggested resources for finding speakers, special guests, and entertainers. Try asking or inquiring of:

- ❖ Friends and family
- ❖ Local, national and international speakers associations
- ❖ Talent agencies
- ❖ The yellow pages (under "Speakers," etc.)
- ❖ Authors of books related to the event's purpose
- ❖ Local colleges and universities
- ❖ Places that relate to the purpose of the event (art museums, fitness clubs, etc.)
- ❖ Browse community Web sites for ideas

In addition, if you see calendars or ads on the Internet or in papers of local events, print or clip them out and store them in a folder. Then you can use this folder for entertainment ideas for future corporate and community events.

Remember, these are just a few of the places where you can find speakers to contribute something to your events. When you talk to places that relate to the purpose of the event, ask to talk to a person in the organization who hires speakers. You can also ask for references from someone you think might know of people who have spoken publicly before or who are enthusiastic about offering their services at your event. The Chamber of Commerce in your area is also a good source for information regarding places where you can find speakers. You can also consult with other Event Planners to see if they have any ideas concerning entertainment.

Always meet with the speaker or special guest, get a sample of their work if possible and obtain references. Many professional speakers can provide you with video clip or audio file of their work. It's also a good idea to attend another event where they're speaking to get an idea of whether they will be appropriate for your event. If you are booking an entertainer, consider doing so through a talent agency to ensure reliability.

When booking a speaker, it's very important to check references. Ask the person the speaker lists as a reference what the reaction of their group was to the speaker, whether the speaker kept the group's attention, came on time and did what the person expected. A good speaker or entertainer is a wonderful addition to any event, but someone who doesn't perform well could cast a negative light on the entire event. Do your homework and discuss expectations early, and you can make sure that the speaker, guest or entertainer will be successful.

Get It in Writing

Another part of your job includes booking and working with the speakers or special guests. If your client has a particular entertainer in mind, it is your job to contact that person and arrange the date, time, place and payment. This is where a contract comes in. Most professional speakers, sponsors, special guests and entertainers will have their own contracts. You will need to review this and make any adjustments to the contract before signing. Check the contract for:

- ❖ Price
- ❖ Length of presentation
- ❖ Contract inclusions (autographs, answer questions, visit with guests)
- ❖ Cancellation or “no show” policy
- ❖ Travel expense policy
- ❖ Hotel and meals expense policy

Payment can take place before or after the event, or sometimes a portion of the payment is made before the event and the rest after. Payment specifics will vary with each speaker, special guest or entertainer. Some special guests will not require payment, but it is always good to offer something, such as a gift certificate or other gift to show your appreciation. This ensures that the special guest will oblige you in the future. Sometimes a speaker will offer *pro bono services*. **Pro bono services** are services that are free (though they are often given in exchange for advertising or promotion, as in the case of the writers whose books were being promoted).

Step 4 Practice Exercise 6-1

□ For questions 1 through 5, fill in the blank with a word or phrase that best completes the sentence.

1. **Part of your job as an Event Planner is to assess the event's _____ and tone when deciding on a speaker or special guest.**
2. **Professional speakers are those people trained or experienced in _____.**
3. **The speaker can enhance the event by offering information or entertainment _____ to the event.**
4. **To find speakers or special guests, first look in your _____ for people who have professional or personal experience in an area that relates to your event.**
5. **When you book a speaker, it's very important to check _____.**

For questions 6 through 8, write your answers in the space provided.

6. **List two resources you could use to locate a special guest, speaker or entertainer.**

7. **You and your client are planning a community marathon. Suggest two speakers, special guests or entertainers that could fit with your event.**

8. **When you review your speaker's contract, you should make sure it lists specific items. List two of these.**

Step 5 Review Practice Exercise 6-1

- ❑ Compare your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 6 Will You Sponsor Me? Work with Sponsors for Event Support

- ❑ Think back to the last event you attended. Did it have sponsors? Perhaps your event T-shirt listed local businesses, or you were handed a particular brand of water during the event. Many events have sponsors that provide donations for the event.

Sponsors can provide donations—time, supplies, funds, labor or anything else you might need for an event. How do you get sponsors? It's simple: you just ask! There are many organizations and businesses willing to sponsor events. They may wish to support a particular cause. They will also be interested in increasing the awareness of their company and reaching more people. At the event, you must remember to publicly mention and thank any sponsors that have provided services or donations. One big reason that businesses and organizations sponsor events is the publicity they receive in return. You can even get free supplies from some businesses if they can get free advertising in return. This is a great relationship for both Event Planners and sponsors—the exchange of supplies or donations for free advertising and publicity works well for both of you. Getting sponsors keeps costs low, makes profits higher and increases recognition of more than one business in your community.



Create a list of businesses or individuals that you can ask to sponsor your event.

Where to Ask for Sponsorship

As you do when you locate speakers, good sources for sponsors exist right in your community. First, think about who you want to ask for sponsorship and what you want them to donate. Come up with a list of businesses or individuals you'll ask to sponsor your event. Perhaps these businesses want to sponsor a particular item or part of the event. For example, the local radio station might be asked to sponsor the audio equipment for your event (and asked to broadcast the event, if appropriate). A coffee shop would probably be glad to donate coffee in exchange for having their name on advertising, such as T-shirts or mugs. A home-improvement store may be asked to donate items to support an event to raise money to build a homeless shelter.

But don't limit yourself. Any business or organization—not just those related to the purpose of your event—is worth looking into for sponsorship. Many businesses employ people who handle requests for sponsorship every day, and most businesses expect to be contacted. The worst thing you can get is a refusal, so any idea for a sponsor is worth investigating. You can also contact the Chamber of Commerce in your city to find out if there are particular organizations you may not be aware of that might be willing to sponsor your event. Here are just a few more suggestions of places to find sponsorship:

- ❖ Rotary clubs
- ❖ Educational associations
- ❖ Fraternities and sororities
- ❖ Business associations
- ❖ Banks
- ❖ Insurance companies
- ❖ Grocery stores



Create a list of businesses or individuals that you can ask to sponsor your event.

Sponsorship is most often appropriate for community fundraising events. Remember that if the business or organization you're asking to sponsor you is guaranteed free advertising, they will be more willing to donate something for the event. It's a good idea to offer recognition to individuals who sponsor events as well. Never, however, underestimate a sponsor's wish to support a good cause—simply wanting to help out is a strong motivation for many companies and individuals who sponsor events, so don't assume businesses are "only in it" for free advertising!

Ask for Sponsorship

As you attempt to secure sponsorship, it is a good idea to appear professional and to have all the details of the event laid out ahead of time. Ask for sponsorship as far in advance as you can. Many companies, particularly large corporations, allocate funds for charity at the beginning of their fiscal year. So it might be helpful to find out what the company's fiscal year is before asking.



First contact your potential sponsor in writing.

Once you've decided to ask a company or individual, contact them first in writing. Remember that most businesses are used to receiving requests for donations. Find out who handles sponsorship for the company or business. Send that person a sponsorship packet. Your sponsorship packet, or proposal, is one of your most effective tools. It typically includes a letter that explains the event and asks for sponsorship, written materials about the organization or cause the event is benefiting and sometimes complimentary tickets.

Sometimes, businesses and individuals will respond to a well-presented packet without any prompting. But more often, securing sponsorship involves a little more footwork. When you look for sponsorship, follow up anything you send by mail with a phone call or a visit. Remember to show enthusiasm about your event! Politely ask if they have had a chance to consider your proposal. Ask for a donation of any kind that the business or organization is willing to contribute. If they need time to decide, leave your name and number with them. Never badger potential sponsors. This is one area where following up needs to be treated with care. Don't call or visit the potential sponsor more than twice if they have agreed to think about sponsorship. If they refuse immediately, don't contact them again, at least for that particular event. There are plenty of willing sponsors out there. Here are a few basics concerning sponsorship:

- ❖ Know what you want
- ❖ Research the company
- ❖ Contact decision-makers
- ❖ Know your event demographics (specifics about who your participants are—their ages, zip codes, buying habits, etc.)
- ❖ Provide good information about the cause you are raising funds for
- ❖ Offer different options for or levels of sponsorship
- ❖ Offer unique opportunities for company exposure
- ❖ Follow up and send thank-you notes
- ❖ Maintain communication after event
- ❖ Build relationships

Create Sponsorship Proposals

As you seek sponsorship, prepare a proposal carefully. Research the sponsor you are approaching; this shows that you have a real interest in the sponsor and aren't contacting every business in town. Try to fulfill the sponsor's needs as well as your own. Meet their demands, knowing that they may be a valuable sponsor in the future. When you present your proposal, make sure it evokes the excitement and value of the event. Provide information about the cause you are raising funds for; if it's an organization, send a fact sheet on their letterhead. The proposal should be concise to ensure that the sponsor reads it; if you give them too much material, they may not have the time or attention to read it. You should also present the sponsorship as an investment, not an expense. Stress the importance of how sponsorship will benefit a business with regard to promotion and advertising.

Now that you know more about sponsorship, let's look at how Cynthia's sponsorship packet looks. Following is a sample sponsorship proposal, written a year after the first successful "At Home with Words."

Cynthia Ross
446 Cherry Street
Marshall, NM 87608
(505) 543-2111

Meredith Finley
Greetings & More
110 Main Street
Marshall, NM 87608

July 25, 20XX

Dear Ms. Finley:

It's that time of the year—the time of the year to be "At Home with Words"—to help combat homelessness and celebrate the work of local writers. On August 21, Wordsworth Books will host its second annual benefit reading for Home Base, our county's homeless organization.

This year six celebrated writers, including nationally acclaimed poet Harvey Gold, will be sharing their words with over 100 members of our community.

A commemorative program will be distributed at the reading, and our popular bookmarks will also be given away before and after the event. We invite you to help the homeless in our community by securing advertising space in the program, on the bookmark or by participating in other sponsorship opportunities. These sponsorships will give your business marketing exposure, as well as help provide funds for building a new shelter and develop a job-training program for homeless people in our area.

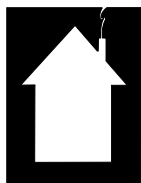
I'll contact your office next week regarding the possibility of arranging an appointment at your convenience to discuss this opportunity in more detail. We're hoping "At Home with Words" will continue to help house people in our community through the power of words!

Thank you for your time and consideration.

Sincerely,

Cynthia Ross

The following is a sample fact sheet, on company letterhead, about “Home Base,” the homeless organization Cynthia is raising funds for. Though many organizations have their own fact sheets, you will sometimes need to help prepare one:



Home Base
123 Safehouse Drive
Anytown, USA 80901
(800) 234-5678

Home Base

Home Base is a nonprofit organization committed to combating homelessness in Fisk County. Many people don't know that there are over 100 families and individuals in our county who do not have a place to live, and the number has risen steadily in the last five years. These are regular folks displaced by the rising cost of housing and unemployment, people struggling simply to find a roof over their heads and provide for their families.

Home Base seeks to provide temporary shelters and long-term solutions to this problem. A major portion of all funds raised goes to building temporary shelters and investing in job-training programs and low-cost housing opportunities. Another major goal of Home Base is to raise community awareness about homelessness.

We have had great successes in our two years, thanks to the generosity of businesses and individuals in our fine community. Over 50 of our clients have found permanent housing and jobs, and the numbers are growing. The satisfaction of helping people hold responsible jobs and have decent housing is indescribable.

In addition to the letter and fact sheet, Cynthia's proposal would also contain a fact sheet with biographies of the writers reading at her event. The speakers, special guests and entertainers you hire will often be able to provide you with short paragraphs that describe them or their work, but sometimes you'll need to create them yourself. Here is a sample biography about poet Harvey Gold:

Harvey Gold
123 Mineral Parkway
Anytown, USA 80901
(800) 456-7890

Harvey Gold

Critically acclaimed poet Harvey Gold, author of the collections *Home by Five*, *Razor Sharp* and *Desert Skylark*, is also a "fabulous, engaging, funny, warm, heck of a guy," according to the *New Mexican Journal*. His public appearances are national and numerous. His ability to excite his audiences has made him extremely popular. Most importantly, his poetry is direct, often humorous and accessible. His words come straight from the heart, and his meditations on what home means make him an ideal contributor to "At Home with Words."

As you saw from Cynthia's letter, it's a very good idea to offer businesses and individuals different opportunities for sponsorship. Everyone likes to give something, and when you give people options, you often get the best results.

The following is a sample “Sponsorship Opportunities” sheet that Cynthia includes in her sponsorship packet:



2nd Annual “At Home with Words” Reading

A Benefit for Home Base

Hosted by Wordsworth Books

Sponsorship Opportunities

Event date and time: August 21, 20XX

Location: Wordsworth Books, South Denton and 1st Street

Entrance fee: \$20 (refreshments provided)

Activities: Poetry and fiction reading, book signing to follow, 20% of all book sales donated to Home Base.

All sponsorships must be paid in full by August 1, 20XX for placement in the program booklet. Please make checks payable to Home Base.

Bookmark Sponsor:

Sponsorship rate: \$50

Includes: Your business name on the back of an attractive, laminated bookmark advertising the event, which will be distributed a week before the day of the event; 50 bookmarks for your own distribution.

25% of this sponsorship is tax-deductible.

Program Sponsor:

Booklet size: 8½ “x 5½”

Copy deadline: August 1, 20XX

Advertisement space:

<u>Size</u>	<u>Rate</u>
Full page	\$200
½ page	\$150
¼ page	\$ 75
1/8 page	\$ 50
Back cover	\$300
Inside back cover	\$250
Inside front cover	\$250

Covers are sold subject to availability.

Prices based on camera-ready artwork (including business cards). If copy is not camera ready, add 25% of ad rate for layout and typesetting. Add \$15 for each photo submitted.

Advertisements are tax deductible as an advertising expense, not a contribution expense.

(Continued)

Refreshments Sponsor:

Sponsors donate coffee, baked goods, plates, napkins, fruit or cheese and crackers for refreshments. Sponsor may display corporate banner and/or signage at the refreshment stations. Refreshment sponsors will also receive a full-page thank-you notice in the program.

Also available: Opportunity to sponsor corporate/business logo mugs, T-shirts, etc.
Call Cynthia Ross at (505) 543-2111.

Amount of tangible product donation is tax deductible as a donation expense.

Speaker Sponsor:

Sponsorship rate: \$500

Includes: Full-page program advertisement
10 complimentary tickets
Designated signage facing the audience
25 refreshment coupons

A portion of the sponsorship rate, \$187.50, is tax deductible as a donation expense. This is calculated on the \$500 sponsorship donation minus fair market value of goods received, \$200 for tickets and \$62.50 for refreshment coupons.

Gold Sponsor:

Sponsorship Rate: \$1,000

Includes: Full-page program advertisement
10 Complimentary front-row tickets
Designated signage facing the audience
Room-banner display
100 refreshment coupons

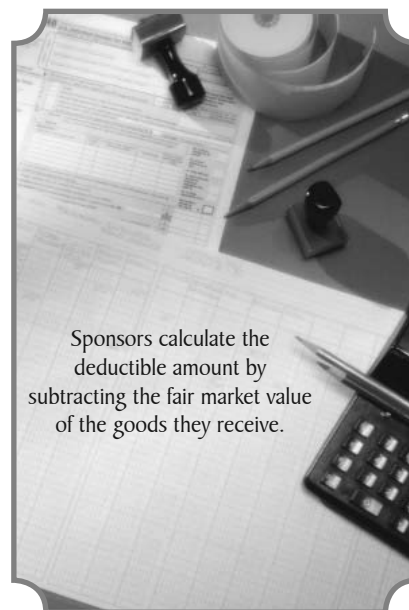
A portion of the sponsorship rate, \$375, is tax deductible as a donation expense. This is calculated on the \$1,000 sponsorship donation minus fair market value of goods received, \$200 for tickets and \$125 for refreshment coupons.

In addition to the above materials, a sponsorship packet might also include fliers or posters with a letter asking business owners to display them (sometimes in exchange for tickets). An order form for advertising in programs also is included in a sponsorship packet. Remember, sponsors like to know who will be at your event (demographics)—it helps them to know how effective the advertising you offer them will be. It's also a good idea to offer exclusive or semi-exclusive advertising to a few of your sponsors if possible.

Is This Tax Deductible?

An important incentive for sponsors when they are donating is that they can deduct many donations from their taxes. You can calculate a donation expense for a potential sponsor by calculating the price of the donation minus the fair market value of the goods they receive. For instance, if a sponsor paid \$500 for a baseball signed by a major league player and the ball's market value was \$175, he or she could deduct only \$325 for a donation expense.

Now, say it's a ticket to a fundraising dinner where each ticket is \$250 a plate. The fair market value of goods obviously includes the \$35 per plate (non-discounted) catering expense. (If the caterer discounted the meal from fair market value, the fair market value would still be used in the calculations.) The fair market value of goods and services might also include drinks, hors d'oeuvres, entertainment and favors. Obviously, the fair market value of some goods might be calculated differently by various people.



Sponsorships are sometimes confusing to calculate because the fair market value may not be just the cost of banners, printing, etc. The fair market value may be almost as much as the amount charged because of the exposure and advertising opportunities. It may also be possible for the sponsor to deduct the entire sponsorship as an advertising cost. The Event Planner can suggest that the sponsor check with their accountant. Another method of determining how much of a donation is deductible is to contact the charity's accountant for advice at no charge.

While it's not mandatory to include information about what's tax deductible on sponsorship proposals, it's considerate for your sponsors if you do. IRS laws, rules and regulations change quite often. It's important to look into the current IRS laws, as there are fines involved for not following rules. You can always call the charity's accountant or the IRS directly with your questions.

Also, in order to comply with sales tax laws, you need to check the local sales tax regulations if you sell merchandise at the event. For example, when Cynthia checked into the sales tax rules for Marshall, her city, she was informed by the tax authority that, based on the estimated amount of sales for the event, no sales tax needed to be collected on the T-shirts. This is not always the case, so call your local tax office to check before selling any merchandise at an event.

How to Work With Sponsors

Once you have made your initial contact and the business or organization has agreed to sponsor your event, get the supply or monetary donation in writing, along with a statement that you'll mention them or post their name and logo at the event. Invite your sponsor to the event, give them complimentary tickets if there is a ticket price (and if you have tickets to spare!) and thank them at the event, verbally and in writing. You must remember to thank the sponsors—preferably in person—after the event has taken place.

Also, frequent their business and encourage others involved in the event to do so. It's also important to keep a list of the sponsors with whom you are successful; you may want to contact them again for other events.

Other Ideas to Raise Money at Your Event

In addition to raising money by sponsorship, here are some ideas that an event host or sponsor could try in order to raise money:

- ❖ **Sweepstakes/Contests:** This gets guests excited about the business or cause's name. Sweepstakes and contests generate a lot of publicity just from the excitement of winning a prize.
- ❖ **Purchase-Percentage Donations:** The business hosting the event gives a certain percentage of its sales for a specified period of time. You will then include the business's name at the event as contributing that percentage.
- ❖ **On-Site Sales:** A sponsor's product is sold at the event in exchange for a donation or services offered.
- ❖ **On-Site Presence:** A sponsor's product is displayed at the event free of charge in exchange for sponsorship.
- ❖ **Coupons:** You can distribute coupons at the event to promote sales for the host or sponsor.



Give your sponsor complimentary tickets to the event and thank them at the event.

Step 7 Promote and Market the Event

- ❑ An event is not an event if nobody comes! One extremely important part of planning and carrying out events is promotion and marketing. In other words, you need to let people know about the event to ensure that they come. This is especially true for business and community events. Part of what makes an event successful is the guest turnout. The guests make up the body of the event; without them, it wouldn't be an event. Promoting and marketing the event effectively is essential to its success.

Promotion

Promotion makes people aware of the event and persuades them to attend. Promotion includes anything you can do to get the word out about the event and create excitement about your event. The first step of promotion is to target your efforts—who are the people you want to come to your event and how can you best let them know about the event? Some methods are listed that you can use in your promotion efforts. Remember to evaluate the expense of each method. You may not reach enough people with a radio ad for the cost to be worth it. Keep in mind that sometimes the cheapest methods are actually the most effective.

Choose a method targeted to best reach your audience:

- ❖ Obtain a write-up in company newsletters.
- ❖ Distribute brochures.
- ❖ Post fliers in area businesses.
- ❖ Set up a table on-site at a company you're working with (in lunchrooms, lobbies).
- ❖ Send a general e-mail (or have a company representative do it for you).
- ❖ Hand out fliers on the street.
- ❖ Buy radio ads.
- ❖ Organize direct-mail or e-mail campaigns to target lists of people.
- ❖ Buy television commercials.
- ❖ Buy newspaper ads.
- ❖ Offer door prizes.
- ❖ Do "lucky ticket" giveaways.
- ❖ Distribute event maps and schedules.
- ❖ Give free demonstrations during the event.
- ❖ Provide complimentary passes.
- ❖ Fly a banner via airplane during a community event.
- ❖ Post information on Internet community calendars or calendars in local publications.

The scope of your promotion activities will depend on the type of event and its budget. Promotion tends to be more of an issue for community events because community events involve more people from outside an organization. Certain business events, however, such as trade shows, conventions and seminars, can also be large and need to attract outside guests.

Your promotion may include tickets, invitations, fliers, a small article in a local newspaper, billboards and signs or balloons at the entrance to the site, for example. Be creative! You may be able to get public service announcements if the event is a community event with human interest. You may need to make arrangements with the media, including Internet, magazines, newspapers, radio and television. Newspaper stories about your event will sometimes include a photo, so you may need to make arrangements regarding the photographer's presence at the event.



Post fliers around town to increase awareness of your event.

Depending on the scope of the event and your target audience, you may need to send press releases that include pertinent information about the event, such as date, time, place and purpose, or you will need to contact radio stations and television stations regarding the event. Newspapers can provide you with press release forms, or you may need to write up a brief, exciting description of your event, which some papers will then alter a bit and print as a short news item.

Marketing

How many times have you seen T-shirts with the names and dates of events on them? You might recall T-shirts that say, “Homecoming 5K,” “Earth Day,” “Lollapalooza” or “Newport Jazz Festival.” These are popular events that have wisely marketed their event by displaying the name and sometimes the date or location on a T-shirt. This kind of marketing is like a walking billboard; the event makes use of mobile advertising to get the word out about the event. Marketing includes advertising about an event on a product that can be distributed throughout the community. For example, you can market your event by advertising on:

- ❖ T-shirts
- ❖ Mousepads
- ❖ Water bottles
- ❖ Bumper stickers
- ❖ Notepads
- ❖ Coffee mugs
- ❖ Key chains
- ❖ Balloons
- ❖ Pens, pencils, highlighters

Expert Advice

In addition to marketing your event, printing marketing materials might appeal to sponsors as well. Sponsors might donate if they can place their logo and business name on a T-shirt, for example.

Marketing possibilities include anything that you can have the event name and date printed on. Target your efforts to the people you want to attract. If you want educators at the event, for example, use pens and school supplies to attract them. Marketing also depends on the target audience. You should tailor the item you’re using to the particular audience, just like Cynthia did with her bookmarks.



Use marketing materials that target your audience, such as pens to attract educators to an event.

Early distribution of marketing items also helps guarantee a good turnout at the event, as well as provide a reminder for future annual events or fundraisers.

Other methods for marketing your event are tied in with promotion. Marketing also includes:

- ❖ Posters and banners
- ❖ Direct mail (brochures, postcards, etc.) or e-mails
- ❖ Radio, television, magazines, newspaper ads
- ❖ Press releases

Sponsors can be very helpful with marketing, as well. They may be willing to donate printed items with the name and date of the event, as well as their own logo. Sponsors may even donate a percentage of the sales of the marketing items to your event. They may also have ideas about what types of items you should use for your event.

Party favors can often serve as ideas for marketing items that you may want to include as part of your event's promotion. If the bookstore event had been larger, perhaps including customers or investors, the bookmarks also would have been an excellent marketing item that could've been sold at the event as a way to generate revenue and boost name recognition.

Step 8 Make a Splash—Themes and Your Event

- ❑ When you market and promote your event, it's a good idea to apply the theme to all of the materials you distribute. As you already know, developing an event's theme can generate excitement about the event. It can also help you design invitations, decorations and inspire your decision about who to select as the speaker or special guest. A theme helps define the tone and purpose of the event. Always discuss the issue of a theme with your client. Themes can enhance social, corporate and community events, and are useful in the realm of promotion and marketing. Theme-related products that promote and market the event serve as strong reminders for guests and attendees. Theme-related invitations, decorations, entertainment, speakers and special guests help to evoke excitement for the event and serve as aesthetic reminders and mementos.

A theme doesn't need to be exotic and may simply match the purpose of the event. Remember how Cynthia carried the home and words theme throughout the planning process, and included it in the invitation design and speaker selection? Themes can be incorporated into catering, decorations, advertising design, marketing products and site location. Any theme that relates to the guest of honor, event's purpose or tone, event's location, employees' occupations or the guests and employees themselves can be applied to the event. Creativity reigns in developing and designing themes for events. You can even recruit committee members and volunteers to help you brainstorm ideas for event themes. The sky's the limit!

Expert Advice

Respecting Diversity

An important thing to consider as you plan, promote and market community events is diversity. Be sure that your promotion and marketing efforts don't exclude people of diverse cultures. Of course, some of the events you plan will exclude certain people simply because of the nature of the event—for example, some sporting events would exclude people with disabilities, or a women's golf tournament would exclude men. However, you should be aware of diversity insofar as you reflect the interests of the community as a whole, without targeting a specific audience. Some people of diverse cultures feel isolated from the community. Make everyone feel welcome, and your community event will prosper!

Here are a few creative ideas to incorporate themes into your event:

- ❖ Use a fashion designer's sketch as a logo on fliers and invitations for a student fashion show.
- ❖ Create invitations in the shape of a balloon for a children's party, then send them with actual balloons.
- ❖ To raise funds for a soup kitchen, ask local restaurants to donate gourmet soup recipes, then have a "taste-off" or contest at the event. Use the motto "Soup's On" on your marketing and promotion materials.

Most importantly, let your imagination be your guide! Let's learn how to effectively work with a committee to plan an event.

Step 9 Let's Pull Together—Work with a Committee and Volunteers

- Depending on the nature of your event, you will often have the help of committees and volunteers. Whether your event is a meeting, trade show or a children's party, you can always use help. You can form committees to help with everything from designing the invitations to finding sponsors for an event. Committee members and volunteers offer their time and assistance, and can also be a great source of ideas. Keep in mind that diplomacy is key. The most important rules of thumb when you work with committees, especially those made up of volunteers are:
 1. Every idea is a good idea.
 2. As a group, decide which of those good ideas can be used this time.
 3. Create a team feeling.
 4. Know the motivation of the volunteers.



When you work with a committee, you want to create a team feeling.

You can motivate committee members and volunteers and create a team spirit by expressing your need for them and your recognition of their abilities and ideas. Make committee members feel important, and let committee members and volunteers know they are needed will ensure their enthusiastic participation. Working on the event can be an opportunity for personal and professional growth for them, building skills and offering a challenge or a sense of personal accomplishment. Committee members and volunteers participate in events for a variety of purposes. Some may want free tickets, have a passion for the charity, have a love of decoration or

enjoy being involved in a group effort. It's your job to make sure they stay motivated. If they are working in exchange for free tickets, be sure they get those tickets. If they love to decorate, make sure they're on the decoration committee. And if they feel passionate about the charity, make sure they have an opportunity to express this in the planning process (and don't insult them by assuming they are "in it" for selfish reasons). It's a good idea to begin the first session of a committee meeting by having the members introduce themselves and say a little about why they are on the committee. Also, as you work with people, you will become aware of why they are involved, too.

To recruit committee members and volunteers and explain what their roles will be, you can make a volunteer job description, which you can post or send out. The volunteer job description lists the event, the expectations required of committee members and volunteers, the duties they will be responsible for and, if necessary, the qualifications they should have, such as experience in certain areas that relate to your event. Including qualifications in the volunteer job description will make it easier to specialize committees for larger events.

Delegate Responsibilities

Responsibilities should be delegated so one person (including you!) isn't overwhelmed with too many tasks. One form to help you do this and that you can add to your Event Planning notebook is the "Committees List." Depending on the scope of your event, you may need to organize committees to help you with responsibilities. Take a look at the sample form on the following page, which can be customized for any event.

Committees List

<u>Task</u>	<u>Name, Phone Number and E-mail address</u>	<u>Follow-up</u>	<u>Completed</u>
<u>Invitation preparation</u>			
<u>RSVPs</u>			
<u>Decorations</u>			
<u>Outside services</u>			
<u>Sponsorship</u>			
<u>Shopping</u>			
<u>Transporting supplies</u>			
<u>Site set-up</u>			
<u>Catering</u>			
<u>Entertainment</u>			
<u>Speaker/Special guest</u>			
<u>Activities</u>			
<u>Hosting/Greeting</u>			
<u>Clean-up</u>			
<u>Returns</u>			
<u>Other</u>			
<u>Other</u>			

You can add anything to this list as required by the event or party you are planning. You may also need to add more lines for each category depending on the number of people you have on each committee. You may even need to create separate committee lists depending on the size of your event. You can add special tasks to this list, such as guest pick-up, ushering or sound system setup. The great thing about all the event planning lists is that you can customize them to fit your needs.

On the day of the event, it's also a great idea to present volunteers with a task sheet that describes individual duties and the times when these duties need to be taken care of. This way you don't need to run around telling people what to do, and their duties will be clear. In addition to detailing schedule and duties, the task sheet can also detail what the volunteers should wear and/or bring to the event (black and white clothes, sun block, an umbrella, for example).

Thank Your Team

There are many ways you can thank committee members for their help during and after the event. The best thing you can say to committee members or volunteers is “thank you!” Verbally saying thank you throughout the event planning, at the event and after the event shows that you recognize the importance of committee members and volunteers. You should also give a more concrete thank you. As with sponsors, you should always send thank-you notes to committee members.

Make your committee members feel appreciated. They’re usually volunteering their time because they care a great deal about the event. If you want them to help with future events, make sure they are thanked appropriately. Here are some ideas about how to thank committee members and volunteers:

- ❖ Handwritten thank-you notes
- ❖ Certificates of appreciation
- ❖ Gifts
- ❖ Pizza parties (or any kind of party at all!)
- ❖ Follow-up sessions
- ❖ Personal visits
- ❖ Presentation of awards
- ❖ Providing a T-shirt or mug from the event
- ❖ Free tickets to the event
- ❖ Free memberships to organizations involved (zoos, museums, etc.)
- ❖ Volunteering at their events
- ❖ Including them in your newsletter



Thank your committee members for their event help.

These activities make the committee members and volunteers feel that their time was worthwhile to you and to the event.

Step 10 Your Role on the Day of the Event

- Your role on the day of the event is, of course, to ensure that things run smoothly. Depending on the nature and scope of the event, you may need to be an active director of the setup, catering, activities, entertainment or clean-up. It's always your client's event first, though, and your client should get the "glory" for a job well done while you stay behind the scenes, or stand in a central location answering questions. Guests and hosts are relying on you to take care of the details so they can focus on the event itself. If you have sponsors, you will also be in charge of communicating and directing them if they are in attendance, as well as ensuring that they are given proper recognition for their sponsorship. Similar to the Wedding Planner, the Event Planner will need to make a checklist for the day of the event and coordinate vendor services.

A master checklist will help you organize time, tasks and services. The master checklist includes aspects of planning and organizing that occur before the actual event. Look in your *Wedding and Event Planner Forms* supplement for a useful sample form.

Customize the master checklist if you need to, but this list contains most of the main details of any event. All the lists in the Event Planning notebook will make your job a lot easier and faster. You won't have to waste time trying to remember what you need to do and whether you've done it. It will be all right there in your Event Planning notebook.



A master checklist will allow you to organize time, tasks and services for the event.

Troubleshoot on the Day of the Event

In order to troubleshoot events, you first listen, evaluate the scope of the problem and then decide how to fix it. It's always important to determine how big the problem really is and whether you can fix it before involving your client. Remember, you were hired so your client can enjoy the event, so it's essential that you keep cool, calm and collected if problems arise. Sometimes, your client may never need to know there was a problem if you handle things well. Other times, you'll need to bring problems to his or her attention. Touch base with your client during the event to make sure he or she is satisfied, and make adjustments as needed.

Another part of your role as the Event Planner may include dealing with questions, concerns or complaints during any part of the planning process, at the event or after the event. You may get complaints from guests, committee members, caterers, speakers and sponsors. You would like to please everyone, but remember that you can't please everyone all of the time. Review the following useful steps when you face complaints.

1. **Listen carefully.** Sometimes the person complaining just needs to vent, and this solves the problem. Also, you want to be sure to understand the complaint so you can evaluate it objectively.
2. **Confirm what the person is saying.** Most people find this in itself to be soothing. Take into consideration the emotional stance of the person complaining and try to tap into that—many people just want to be heard!
3. **Ask for (or offer) suggestions.** Depending on the person, it may be a good idea to involve them in coming up with solutions. Or it might simply be better to show them that you can take care of things.
4. **Offer Solutions.** If the complaint is reasonable, try to think of something you can do to resolve the problem. When you deal with complaints, you will need to first be sympathetic, then apologize, even if you are not directly responsible for the problem. Of course, some complaints will be totally unreasonable, and in these cases, it is still important that you listen, sympathize and apologize. Often, an apology is all it takes to satisfy a complaint.

On the day of the event, you play a very active role in every phase, from the set-up to the clean-up. As an on-site manager, you will often direct each phase of the event. Additionally, you may carry a walkie-talkie to facilitate the activities and phases of committee members, volunteers, sponsors and speakers when the event is large in scope. People will look to you for guidance, so show confidence in how things are going. You are in charge and you need to be kept informed of changes as they occur. But even when the event is big, you still need to stay behind the scenes.



Listen carefully to the person's complaint because maybe he or she needs to vent to solve the problem.

How Did It Go?—Evaluate the Event

For every single event you do, you will always think of things that could have been done better—but this doesn't mean the event was a failure! It's all part of the process of becoming better and better at what you do. Don't berate yourself about something that didn't go as well as planned, or something you could have done differently. Congratulate yourself for the good things about the event, then look carefully at the whole picture so you can do even better in the future!

After every event, your role is to evaluate. Keep in mind the big picture: Was the client satisfied? Was the purpose carried out? You will also need to evaluate your role in the event from start to finish. And a good way to evaluate your performance at an event is to look at your objectives for the event. Did you achieve them? Then go through the details. Did you select an appropriate speaker? Did you have enough food for guests? Did you plan enough activities? Was the advertising effective? Was the entertainment good? Did you communicate effectively with committee members and volunteers? Did the decorations and invitations reflect the tone and purpose of the event? Did you plan too many activities? Could you have cut your costs somewhere? Did the sponsors work well? Answering these types of questions will help you in plan other events and build on your role and experience as an Event Planner.

Most Event Planners distribute evaluation sheets to the client and the committee members after the event to get feedback. Especially if the event is an annual one, this helps to make adjustments in the future. Be aware that people often feel they have to find something negative to say when asked for an evaluation. A good tip for avoiding this is to ask people to list two things they liked about the event and two things they think could be improved.



Most Event Planners give evaluation sheets to the client and committee members after the event.

In this section, you've learned how to market, promote and evaluate your event. Let's apply that knowledge in the following Practice Exercise.

Step 11 Practice Exercise 6-2

- For questions 1 through 5, fill in the blank with the word or phrase that best completes each sentence.

1. **Never underestimate a sponsor's wish to support a _____ — simply wanting to help out is a strong motivation for many companies and individuals who sponsor events in different ways.**
2. **Ask for sponsorship as far in _____ as you can.**
3. **Your _____, or proposal, is one of your most effective tools.**
4. _____ **makes people aware of the event and persuades them to attend.**
5. **When you're marketing and promoting your _____ event, it's a good idea to carry through with all of the materials you distribute.**

For questions 6 through 10, choose the best answer from the choices provided.

6. **Letting committee members and volunteers know they are needed will ensure their _____.**
 - a. enthusiastic participation
 - b. sponsorship
 - c. attendance
 - d. none of the above

7. **The volunteer job description lists the ____.**
- expectations required of committee members and volunteers
 - duties they will be responsible for
 - qualifications they should have
 - all of the above
8. **As with sponsors, you should always send ____ to committee members.**
- payment
 - thank-you notes
 - letters of recommendation
 - all of the above
9. **Guests and hosts are relying on you to ____ so they can focus on the event itself.**
- tell them what to do
 - be a passive participant
 - take care of the details
 - none of the above
10. **After every event, your role is to ____.**
- relax
 - evaluate
 - find your mistakes
 - none of the above

Step 12 Review Practice Exercise 6-2

- Compare your answers to with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.

Step 13 Lesson Summary

- You have learned some important things about planning events in this lesson. You have learned how and where to find speakers, special guests, entertainers and sponsors for events. You know how to promote and market events, incorporate a theme in an event and work with committees and volunteers to make your job easier, and you have a better idea of your role on the actual day of the event.

You understand that people will be looking to you on the day of the event. Enjoy your leadership role as the Event Planner, and take pride in the fact that you coordinated an event that people will enjoy and remember long after the decorations are gone. They will remember how you directed the activities, and some will be amazed that you were able to coordinate all the details of the event. When you send your thank-you notes or have follow-up parties for sponsors or committee members, your role as a successful Event Planner will be established and will aid you in planning events in the future.



In this lesson, you learned how to find speakers and sponsors for events.

Step 14 Mail-in Quiz 6

- Follow the steps to complete the quiz.
 - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
 - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
 - c. When you've finished, transfer your answers to the Answer Sheet. Use only blue or black ink.
 - d. **Important!** Please fill in all information requested on your Answer Sheet or when submitting your quiz via e-mail.
 - e. Submit your quiz to the school via mail, e-mail or fax.

Mail-in Quiz 6

For questions 1 through 20, choose the best answer from the choices provided.

1. **The speaker should always reflect the _____ of the event.**
 - a. purpose
 - b. budget
 - c. location
 - d. all of the above

2. **_____ are often well-known people who provide a motivational welcome to the event.**
 - a. Special guests
 - b. Keynote speakers
 - c. Entertainers
 - d. none of the above

3. **When choosing a speaker, special guest or entertainer, you'll want to ____.**
 - a. hire whomever you can
 - b. choose a magician
 - c. target your audience
 - d. all of the above

4. **Some resources for finding speakers, special guests and entertainers are ____.**
 - a. friends and family
 - b. talent agencies
 - c. the yellow pages
 - d. all of the above

5. **When booking a speaker, check the contract for: ____.**
 - a. length of presentation
 - b. cancellation or “no show” policy
 - c. travel expense policy
 - d. all of the above

6. **____ can provide donations—time, supplies, funds, labor or anything else you might need for an event.**
 - a. Guests
 - b. Caterers
 - c. Sponsors
 - d. Volunteers

7. **____ is worth looking into for sponsorship.**
 - a. Any business or organization
 - b. Only a business related to the purpose of your event
 - c. The yellow pages
 - d. none of the above

8. **A sponsorship packet typically includes ____.**
 - a. a letter explaining the event and asking for sponsorship
 - b. a resume
 - c. written materials about the organization or cause the event is benefiting
 - d. both a and c

- 9. It's a very good idea to offer businesses and individuals _____ for sponsorship.**
- a. different opportunities
 - b. one choice
 - c. a prize
 - d. none of the above
- 10. An important incentive for sponsors when they are donating is that they _____.**
- a. can make money from ticket sales
 - b. can deduct many donations from their taxes
 - c. don't have to volunteer labor
 - d. none of the above
- 11. You may be able to get _____ if the event is a community event with human interest.**
- a. free entertainment
 - b. reliable committee members
 - c. public service announcements
 - d. better sponsors
- 12. _____ the event effectively is essential to its success.**
- a. Promoting
 - b. Buying radio ads for
 - c. Marketing
 - d. both a and c
- 13. Sponsors may be willing to donate _____.**
- a. printed items with the name and date of the event
 - b. a percentage of the sales of the marketing items
 - c. both a and b
 - d. neither a nor b
- 14. _____ includes advertising about an event on a product that can be distributed throughout the community.**
- a. Sponsorship
 - b. On-site presence
 - c. Marketing
 - d. Promotion

- 15. A _____ can help you design invitations, decorations and inspire your decision about who to select as the speaker or special guest.**
- a. sponsor
 - b. florist
 - c. theme
 - d. none of the above
- 16. Committee members and volunteers _____.**
- a. offer their time
 - b. offer their help
 - c. can be a great source of ideas
 - d. all of the above
- 17. One reason committee members and volunteers wish to participate in events is that they _____.**
- a. want free tickets
 - b. have a passion for the charity
 - c. enjoy being involved in a group effort
 - d. all of the above
- 18. _____ your client during the event to make sure he or she is satisfied.**
- a. Touch base with
 - b. Evaluate
 - c. Interview
 - d. none of the above
- 19. When you deal with complaints, you will need to first be sympathetic, then _____, even if you are not directly responsible for the problem.**
- a. apologize
 - b. dismiss it
 - c. donate money
 - d. none of the above
- 20. A good way to evaluate your performance at an event is to look at your _____ for the event.**
- a. speaker
 - b. objectives
 - c. costs
 - d. number of guests

For questions 21 through 25, answer the following questions on your Quiz Cover Sheet or attach the typed answers to your Quiz Cover Sheet. Each question is worth 8 points.

- 21. Your clients, Molly and Perry Mac, have asked you to plan a birthday party for her 10-year-old daughter, Lucy Mac. Create a To Do list of 10 items for Lucy's birthday party.**

- 22. After talking with Lucy and her parents, Lucy tells you that she wants a princess-themed party. Her parents tell you that about 10 kids will attend the party at the Mac's house, and their budget is \$300. Lucy wants princess-themed invitations, but they haven't been sent, but should include directions to the Mac's house. and wants to make beaded jewelry at her party. Molly said that her friend, Katie, will show the girls how to make beaded jewelry. Lucy requests pink and purple princess decorations as well as tiaras and boas for the party guests. Complete your Event Design List from Lesson 2 with the information you received from Lucy and her parents. If information in the list doesn't apply to the event, write N/A on the line.**

- 23. Today you met with two new clients, Betsy and Will. As you began discussing the couple's vision for their wedding, they brought up some budget concerns. The couple is just starting out, and don't have money for an extravagant wedding. The groom's family has a substantial income and the bride's family is deceased. You discovered that this is the bride's second marriage and the groom's first wedding. What suggestions do you have to divide the wedding expenses?**

- 24. You're helping a client plan a St. Patrick's Day party for a local nonprofit organization. What are three centerpiece or decoration ideas that you'd suggest for the party?**

- 25. You've worked with your client for four months to plan a book-signing party. During the event, a guest complains to you that the line isn't moving fast enough and the finger sandwiches are dry. How would you deal with the guest's complaints?**

Wedding and Event Planner Mail-in Quiz 6

1. Fill in your **student ID** and your **course code** below.

STUDENT ID NUMBER COURSE CODE

2. Be sure your **name** and **address** are filled in below.

3. **Transfer your answers** to this cover sheet.

NAME

ADDRESS

CITY STATE ZIP

For School Use Only:

Grade: _____

U.S. Career Institute WD-02
2001 Lowe Street
Fort Collins, CO 80525

↑ Fold on dotted line

This Space for Instructor Use

1. _____

8. _____

15. _____

2. _____

9. _____

16. _____

3. _____

10. _____

17. _____

4. _____

11. _____

18. _____

5. _____

12. _____

19. _____

6. _____

13. _____

20. _____

7. _____

14. _____

21. To Do List—Lucy's Birthday Party

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

22. Using the information from your quiz, complete the following list.

The Event Design List

Occasion: _____

Theme: _____

Tone/Purpose: _____

Explanation: _____

Host(s): _____

Guest of honor: _____

Speaker or special guest: _____

Projected number of guests: _____

Budget: _____

Ticket price: _____

Sponsors: _____

Invitation design: _____

Invitations sent?: _____

Directions to site included in invitations?: () yes () no

Number of RSVP's returned?: _____

Site information: _____

Decorations: _____

23. _____

24. _____

25. _____

CONGRATULATIONS

You've completed
Lesson 6 and Pack 1!



Don't wait for your quiz results to continue with Lesson 7.

Answer Key

1-6

Lesson 1

Practice Exercise 1-1

1. If you ever have a question about the U.S. Career Institute Wedding and Event Planner course, **b. call an instructor.**
2. All the mail-in quizzes and other assignments in this course **d. all of the above.**
3. Each lesson in this course is designed in a **a. step-by-step** format.
4. The job of a Wedding and Event Planner **c. involves knowledge, creativity and practical skills you will learn as you go through the U.S. Career Institute Wedding and Event Planner course.**
5. The most important thing a Wedding and Event Planner does is **c. make her client happy.**
6. Wedding and Event Planners are in great demand because **d. both a and c.**
7. The best way to make a good first impression with clients is to **d. all of the above.**
8. Explain why you're taking this course. **Answers will vary.**

Lesson 2

Practice Exercise 2-1

1. The Wedding Planner's role **d. all of the above.**
2. When planning a long-distance wedding, a Wedding Planner **b. offers the out-of-town client a little more assurance that things are proceeding as planned.**
3. On the day of the wedding, unforeseen problems **d. both a and c.**
4. A good Wedding Planner works with vendors to **a. get her client the best prices on such services as flowers, food, music or decorations.**
5. On the day of the wedding, the planner **c. enjoys the satisfaction of a job well done.**
6. The steps in planning a wedding **d. both a and c.**
7. A Wedding Planner can focus on making sure things run smoothly because she **a. doesn't have the same emotional connection to the day as the family does.**
8. Wedding Planners are important because they **d. all of the above.**

Practice Exercise 2-2

1. An Event Planner organizes events such as **d. all of the above.**
2. A successful event means that, above all, the Event Planner has kept the client's **c. vision** in mind.
3. An important skill required of an Event Planner is **d. all of the above.**
4. An Event Planner's day may consist of **d. a and c.**
5. The role of the Event Planner is to **c. organize, plan, arrange and confirm details of an event for a client.**
6. The main reason clients hire Event Planners to plan events is that the clients don't have the **b. time** to do it themselves.
7. Event Planners can plan **a. as many events as they wish.**
8. At the initial interview with a client, the Event Planner discusses the **a. budget.**
9. Part of the Event Planner's role is to make decisions **d. all of the above.**
10. The number of steps it takes to plan an event depends on the **c. theme and size** of the event.

Lesson 3

Practice Exercise 3-1

1. One difference between an Event Planner and a Wedding Planner is **a. Event Planners also work on business-related events and community events.**
2. An Event Planner might help organize a **d. all of the above.**
3. When talking with a client for the first time on the phone, you need to always **a. listen carefully and reflect back their ideas.**
4. In the portfolio you show prospective clients, always include **d. both b and c.**
5. If your client wants a “theme” event, you need to make sure that **b. everything related to the event** match/matches up with the theme.
6. In your own words, describe planning and coordinating services. **Not only do you plan the event—advise and help make decisions on such things as décor, food and site; locate and contract with the vendors, wait staff, etc.—but you usually are on hand during the event to make sure that everything flows smoothly.**
7. Your client has selected a Western theme for a company picnic. List three ideas that you can suggest to your client. **Answers will vary, but some ideas include cowboy hats, sheriff badges and bandanas as party favors, coiled ropes as centerpieces, cowboy-, star- and horse-shaped cookies.**
8. Describe how you could bring up the subject of payment when you meet with a client. **So, before you begin discussing an event in too much detail, establish what you’ll be doing to help the client out. Make a list of what areas he or she would like you to help with and agree on a price for each of those services. You might ask the client to initial the list when you have completed it. Or, you may have a contract with “fill in the blank” lines that you complete as you discuss your services with clients and then ask them to sign.**

Practice Exercise 3-2

1. The first decision a client should make when planning an event is **c. where to hold the event.**
2. When discussing location with a client, important considerations are the **d. all of the above.**
3. You should visit the possible facilities **d. both a and b.**
4. One example of an event that may not allow much flexibility when choosing a date is a **c. holiday party.**
5. The responsibility for determining how many people will come to the event is **c. not yours, but your client's.**
6. An event-planning notebook is a great tool to use while planning events because it **c. compiles in one place** all the names, phone numbers, contracts and everything else associated with a particular event.
7. Besides names, phone numbers and contracts, the event-planning notebook contains **c. event-planning lists.**
8. The **a. event-design list** will be your main reference for the early stages of planning the event.
9. The guest list will help you plan for **d. all of the above.**
10. You can customize the guest list for each event, depending on **a. the size and type of event.**

Lesson 4

Practice Exercise 4-1

1. Before you talk to clients about specific budget items, it's a good idea to ask them **d. all of the above.**
2. If others do get involved in the wedding budget planning, **d. all of the above.**
3. The groom's family traditionally pays for the **c. rehearsal dinner.**
4. Today's etiquette says **d. expenses can be divided more flexibly, to allow for different financial situations and family structures.**
5. When involving the groom's family in financing a wedding, the **a. groom** should be the one to approach them about helping.
6. List three creative ways to divide wedding expenses. **Any three of the following is sufficient:**
 - ❖ **Bride and groom pay for the entire wedding.**
 - ❖ **Expenses are shared by all.**
 - ❖ **Expenses are split between the bride and groom's families.**
 - ❖ **Each family pays for their own guests.**
 - ❖ **Groom's family pays for the entire wedding.**
7. List two items that the Groom's is traditionally responsible for. **Any two of the following is sufficient:**
 - ❖ **Bride's rings (engagement and wedding)**
 - ❖ **Bride's wedding gift**
 - ❖ **Gifts for the best man and ushers**
 - ❖ **Bride's bouquet**
 - ❖ **Mothers' corsages**
 - ❖ **Boutonnieres for attendants and fathers**
 - ❖ **Medical exam and blood test (if required)**
 - ❖ **Marriage license**
 - ❖ **Officiant's fee**
 - ❖ **Honeymoon**
 - ❖ **Accommodations for out-of-town ushers**

8. Today you met with two new clients. As you began discussing the couple's vision for their wedding, they brought up some budget concerns. The couple is just starting out, and don't have money for an extravagant wedding. The groom's family has a substantial income and the bride's family is deceased. You discovered that this is the bride's second marriage and the groom's first wedding. What suggestions do you have to divide the wedding expenses? **Remember, there are no right or wrong answers here. You're simply offering your clients suggestions. You could suggest that the groom's family pays for the entire wedding. This is an appropriate option if it is the bride's second marriage and the groom's first, if the bride's family is deceased, or if there is a large disparity in income level between the two families. You also may suggest that the expenses are shared between the bride and groom and the groom's family. Perhaps the groom's family could loan the couple some money to pay for their portion of the wedding.**

Practice Exercise 4-2

1. When working with vendors, it's a good idea to **a. be honest about what your client can spend.**
2. A Wedding Planner mediates between client and **b. vendors.**
3. When clients are concerned about costs, a Wedding Planner can **c. help them think of creative ways to decrease expenses.**
4. One way to cut wedding costs is to **b. hold a morning or afternoon reception.**
5. Ensure your services are valued by **c. firming up your contract before talking about budgets, emphasizing how your relationship with vendors may help save costs, and keeping the lines of communication open.**
6. You're helping two clients from a local real estate office plan a celebratory event. You clients have mentioned that their budget is tight, and they'd like some suggestions to save some money. List two suggestions that you could offer your clients to save money. **Any two of the following is sufficient:**
 - ❖ **Depending on the formality and size of your event, perhaps you could deliver invitations or e-mail invitations.**
 - ❖ **If you need to cut costs, a buffet is more cost efficient than a plated dinner. Or, host a cocktail party and serve hors d'oeuvres instead of a full meal.**
 - ❖ **Serve soft drinks, coffee, tea, wine and beer, and provide a cash bar for other alcoholic beverages.**
 - ❖ **Hold the event in a friend or family member's home or backyard rather than a rented site.**
 - ❖ **If you're event occurs near a holiday, you can use the holiday decorations and save money. For example, if you're planning a cocktail party for your client's small office, hold it in December. Most likely, the location will be decorated with lights and greenery, so you'll need few decorations.**
 - ❖ **If you're including floral arrangements, use in-season flowers.**
 - ❖ **Use CDs and ask a friend to act as deejay. If you have an mp3 player, you can create a playlist and plug it into your site's stereo.**

Lesson 5

Practice Exercise 5-1

1. Which of the following are common indoor site locations? **b. Convention centers, hotels and private residences**
2. For help in finding actual sites to fit your ideas, try the **d. Chamber of Commerce**.
3. It's extremely important to make contact with the official in charge of a site **a. as soon as possible**.
4. Which of the following can you do to make your visit to the site more productive? **c. Take photographs of the site**.
5. Before you make a recommendation to your client, make sure you **b. visit the site**.
6. What types of questions should you ask the site manager about a potential site for your event? Provide at least four questions. **Any four of the following:**
 - ❖ **How much will it cost to use this site? What is the payment plan?**
 - ❖ **What is the deposit?**
 - ❖ **Does the site match the goal of the event?**
 - ❖ **Is a security deposit required? How much is it? When will it be refunded?**
 - ❖ **Does the site offer a party or event package? If so, what does the package include?**
 - ❖ **Are there any times of the day, week or year during which the cost to secure the site is discounted?**
 - ❖ **Does the facility carry liability insurance?**
 - ❖ **How many people can the site accommodate?**
 - ❖ **If the site holds more than one event at one time, where exactly in the site will my client's event occur? And what other specific events will be held there at the same time? Will they be noisy or otherwise distracting in any way?**
 - ❖ **How many hours is the site available? Do any penalty charges apply if your client stays longer? Is there a minimum amount of time that the site must be rented for?**
 - ❖ **Are there any restrictions that involve decorations?**

- ❖ **Are chairs, tables, table linens, plates, glasses and silverware provided? What (if any) is the rental fee for these items?**
- ❖ **Are cooking facilities available?**
- ❖ **Can you use the caterer of your choice, or is there an in-house caterer that the event must use?**
- ❖ **Are there any restrictions on the time of day during which music may be played? What about restrictions on the type or volume of music?**
- ❖ **Are musical instruments available for use? Does an additional rental fee apply?**
- ❖ **Are there any restrictions on alcohol consumption?**
- ❖ **May you provide your own liquor? If not, what is the per-drink or per-person charge?**
- ❖ **Is there a corkage fee associated with wine or champagne?**
- ❖ **Is there an area for dancing?**
- ❖ **Is a microphone provided?**
- ❖ **What sort of restroom facilities does the site offer?**
- ❖ **Does the site provide a coat check? Is there an additional fee?**
- ❖ **What sort of parking is available? Is there an additional fee?**
- ❖ **Can any outdoor areas be tented? Does the site provide this service? If so, does an additional charge apply?**
- ❖ **What considerations are made in the event of bad weather?**
- ❖ **Do neighbors, security companies or police need to be notified that an event is taking place?**
- ❖ **Are heaters and lights provided for outside areas? Is there sufficient electrical power available to use them?**
- ❖ **Is setup and strike (tear-down) included?**
- ❖ **Does the rental fee include post-reception clean-up?**
- ❖ **What is the policy in the event of cancellation?**
- ❖ **Is the site handicap-accessible? (Most large facilities provide a fact sheet detailing that they are compliant with the ADA, or Americans with Disabilities Act, a federal law that requires that all public places be handicap-accessible.)**

7. What are two points that the site contract should include? Why should the contract include the two points that you chose? **Any two of the following:**
1. **Total cost**
 2. **A line-item breakdown of the services that the facility will include**
 3. **The amount of deposit, when the facility received it and whether it's refundable**
 4. **The amount of the remaining balance, including details of the payment schedule**
 5. **Exact date of the event**
 6. **Exact time of the event**
 7. **Exactly where the event will occur (specify the name of the hall, room or building, etc.)**
 8. **The length of time for which the event site will be available**
 9. **A very specific list of all of the materials that are available for your event's use (includes table linens, silverware, microphones, chairs, tables or anything else your client requires)**
 10. **The refund policy that applies in the event of cancellation**
 11. **Any extras that you and the site manager agreed to (If you include these on the contract, it will ensure that they actually happen.)**
 12. **Whether the facility includes setup, strike (take-down) and clean-up**

Answers to the second part of the question will vary. For example, it is important to know the length of time the event site will be available because you want to be sure that you have the site reserved for the entirety of your event and because you want to know what will happen if your event runs long, and you need more time at the site. As long as you provide solid reasons for the two points that you picked, your answer is correct.

8. Your client asked you to help plan a corporate reception that concludes a week-long sales meeting. The president of the company wants the reception to have a nautical theme. Can you offer your client two indoor and outdoor site ideas? Why might each site be a good option? A poor option? **Ideas can vary. Possible indoor choices include a seafood restaurant or a lighthouse. Possible outdoor choices include a yacht, riverboat, near a lake/river or on the beach. Again, reasons why each site option might be good or bad will vary. For example, a public beach would be cheap, but the weather might be poor. A lighthouse might make a great setting for a nautical-theme party, but it might be too small for your event or not equipped to handle your electricity needs. As long as you provide viable reasons as to why each site that you picked may or may not be a good option, your answer is correct.**

Practice Exercise 5-2

1. With rectangular banquet tables, you should allow at least **b. two feet** per guest.
2. When you organize the room setup, a **c. seating diagram** can be invaluable as you make your plans.
3. If there are VIPs, guests of honor, organizational leaders, speakers or other honored guests at the event that you plan, it may be appropriate for you to have a **a. head table** set up for them.
4. When you plan the size of the wait and bartending staff, be aware that you'll need one waiter or waitress for every **b. six to eight** people for sit-down dinners.
5. The **d. buffet** style is the least expensive service style.
6. Your client wants to limit the amount of alcohol that each guest consumes. Which beverage-service style would you recommend to him? Why? **Recommend a ticket-open bar because this allows him to issue a predetermined number of tickets or tokens to guests at the door to limit the amount of alcohol that each guest consumes.**
7. You and your client meet to discuss the room setup for an instructional workshop that you're organizing. Your client asks you the difference between conference style, hollow-square style and modified hollow-square style. How would you explain these seating styles to your client? **You explain that with the conference style, you'll push two rows of banquet tables together along their long sides to make a larger table that resembles a conference table. If you line up the tables end to end to form a square or rectangle with a space in the middle, this is the hollow-square style of table arrangement. Guests sit on the outside of the square or rectangle so that they can all face toward the center and easily pay attention to the same speaker, instructor, etc. The modified hollow-square is the same as the hollow-square except that you'll leave out one of the tables in the setup to allow easy access to the inside of the square.**

8. Your client asks you how many appetizers per person he'll need to order for his event. What can you tell your client? **First, consider whether your client's event includes dinner or is a cocktails-only function. Explain to your client that if an event includes dinner, you'll allow six to eight hors d'oeuvres or appetizers per guest. If the event is cocktails-only, 10 to 12 items per person is a good rule of thumb.**

Practice Exercise 5-3

1. As you lay out a tablecloth, it's a good idea to allow a **b. six- to 12-inch** overhang.
2. **a. Table skirting** is a pleated or gathered cloth attached to the table edge; it usually hangs all the way to the floor.
3. Whatever type of centerpiece you choose, it should **c. lend to conversation at the party or event, not obstruct or distract from it.**
4. **d. Place cards** are a fantastic way to personalize the place setting and let each guest know that he or she is welcome.
5. As you think about the right basket for your centerpiece, consider how you want to **b. fill and/or decorate it.**
6. Even an event with a small budget for decorations should have **d. centerpieces.**
7. You help your client plan a Halloween party. What are two lighting suggestions that you offer your client? **Answers will vary. For example, you might suggest that your client get a fog/smoke machine and perhaps some colored track lighting. Use your imagination!**
8. Your client will hold an elegant ball in February. Suggest three centerpiece ideas. **Answers will vary. The goal of this exercise is to brainstorm centerpiece ideas.**
9. Based on the theme of the party, what are two location ideas that you can give Bill and Betty? **Answers will vary based on your ideas, but a golf course or country club would be appropriate based on the theme.**
10. Based on the event size and budget, Betty and Bill chose a location. Now that you're meeting with the site manager, what are two questions you'll ask? **Any of the site questions from the lesson will work, such as:**
 - ❖ **How much will it cost use this site? What is the payment plan?**
 - ❖ **Does the site offer a party or event package? If so, what is included?**

11. Once the site manager creates the contract, you usually check it. List two items that you check the contract for. **Any of the contract checklist items will work, such as:**
- ❖ **Total cost.**
 - ❖ **A line-item breakdown of the services that will be included.**
 - ❖ **The amount of deposit, when it was received and whether it's refundable.**
 - ❖ **The amount of the remaining balance, including details concerning the payment schedule.**
 - ❖ **Exact date of the event.**
 - ❖ **Exact time of the event.**
12. Now that Bill and Betty have a contract, they need to determine the food service. Neither are familiar with English service or buffet style. How would you explain English service and buffet style to Bill and Betty? **Guests pick up their plates and utensils at one end of the table and take food as they wish, proceeding down the table on one or both sides. Beverages are generally found at a separate table, or, when providing table seating, the beverages are served at the tables where the guests are seated. With the English style, the platters are either held by the wait staff while the guests serve themselves or placed beside the guests at their table.**
13. Betty and Bill have asked you for some decoration ideas that use their golf theme. What are three ideas that you give them? **Answers will vary, but you could suggest any of the following:**
- ❖ **Floral arrangements w/ clear vases that are full of golf balls**
 - ❖ **Golf tees sprinkled on tables**
 - ❖ **Golf ball and club wall hangings**
 - ❖ **Silhouettes of golfers for the tables**
 - ❖ **Galvanized buckets filled with golf ball favors as table centerpieces—each golf ball has Bill and Betty's name and the date of their retirement party**
 - ❖ **Name your tables after famous golf courses, and label each table with a pennant: Augusta, Baltusral, Cypress Point, Golden Horseshoe, Loch Lomond, Pebble Beach, Pinehurst**
 - ❖ **Cut pennant shapes out of paper; glue to toothpicks. Write your guests' names on each pennant in shiny silver marker. Stick upright in a white nougat candy placed on an individual paper candy cup.**

Lesson 6

Practice Exercise 6-1

1. Part of your job as an Event Planner is to assess the event's **purpose** and tone when deciding on a speaker or special guest.
2. Professional speakers are those people trained or experienced in **public speaking**.
3. The speaker can enhance the event by offering information or entertainment **relevant** to the event.
4. To find speakers or special guests, first look in your **community** for people who have professional or personal experience in an area that relates to your event.
5. When you book a speaker, it's very important to check **references**.
6. List two resources you could use to locate a special guest, speaker or entertainer.
Any two of the following are sufficient:
 - ❖ **Friends and family**
 - ❖ **Local, national and international speakers associations**
 - ❖ **Talent agencies**
 - ❖ **The yellow pages (under "Speakers," etc.)**
 - ❖ **Authors of books related to the event's purpose**
 - ❖ **Local colleges and universities**
 - ❖ **Places that relate to the purpose of the event (art museums, fitness clubs, etc.)**
 - ❖ **Browse community Web sites for ideas**
7. You and your client are planning a community marathon. Suggest two speakers, special guests or entertainers that could fit with your event. **Answers will vary, but ideas could include local athletes, well-known runners, mayor, governor or popular coach.**

8. When you review your speaker's contract, you should make sure it lists specific items. List two of these. **Any two of the following are sufficient:**
- ❖ **Price**
 - ❖ **Length of presentation**
 - ❖ **Cancellation or “no show” policy**
 - ❖ **Travel expense policy**
 - ❖ **Hotel and meals expense policy**

Practice Exercise 6-2

1. Never underestimate a sponsor's wish to support a **good cause**—simply wanting to help out is a strong motivation for many companies and individuals who sponsor events in different ways.
2. Ask for sponsorship as far in **advance** as you can.
3. Your **sponsorship packet**, or proposal, is one of your most effective tools.
4. **Promotion** makes people aware of the event and persuades them to attend.
5. When you're marketing and promoting your **theme** event, it's a good idea to carry through with all of the materials you distribute.
6. Letting committee members and volunteers know they are needed will ensure their **a. enthusiastic participation**.
7. The volunteer job description lists **d. all of the above**.
8. As with sponsors, you should always send **b. thank-you notes** to committee members.
9. Guests and hosts are relying on you to **c. take care of the details** so they can focus on the event itself.
10. After every event, your role is to **b. evaluate**.

