

SPECIAL EVENT MANAGEMENT

PRESENTED BY

**CHARMAINE
WILKERSON**

*FOR THE
CERTIFICATE OF COMPLETION
IN
MEETING & EVENT PLANNING*



California State University
Dominguez Hills

College of Extended & International Education

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BIOGRAPHY OF CHARMAINE WILKERSON

Charmaine Wilkerson, the daughter of the “mother-daughter” duo of **and here’s lilly** Events, Marketing & Design, has had an incredible career. Her first major event was managing the historical Opening of the Reagan Library where all five living Presidents at the time were united with their First Ladies. Charmaine has also serviced world leaders such as Margaret Thatcher, Mikhail Gorbachev, and Prince Andrew.

Charmaine joined her mother, Liliana Wilkerson, founder of **and here’s lilly** to add the necessary ‘ingredients’ to form their event management company that took over LA by storm.

Logistics and complete event planning are Charmaine’s forte. Designing menus of the finest cuisines with gold-medal culinary award winning executive chefs is not only what this dynamic duo offer. With Charmaine’s planning expertise they offer the complete package in event management that creates an everlasting reflection of good taste on the client’s guests, bosses, and colleagues. Her meticulous skill for logistics makes running an event streamlined, noted by former CEO of Hewlett Packard Enterprise, Meg Whitman.

Charmaine was contracted by CSU, Dominguez Hills in Carson, CA to bring their signature fundraising event, The Presidential Scholarship & Awards Dinner, to new levels. She also spearheaded their Certificate Program in Meeting & Event Planning through Extended Education. She is currently an Event Management Instructor through UCLA Extension.

The mother-daughter team has been featured in ‘Business Trends’, a publication of the LA Chamber, *The Downtown News*, *The Los Angeles Times*, *Good Housekeeping* magazine, the *Simi Valley Star News*, and the *Simi Valley Daily News*.

Charmaine ran the executive dining services & events for the entire operation of Hewlett Packard Enterprise, Executive Briefing Center in Palo Alto, CA. 10,000 guests served annually with a P&L operation of over \$1M in sales. She currently manages the campus experience at Visa University as well as logistics for worldwide learning activities for Visa, Inc.

MAJOR EVENTS MANAGED:

Oscar’s Governor’s Ball

Emmy’s Governor’s Ball

Inaugural of President George W. Bush

Democratic National Convention in LA

Opening of Reagan Library

Special Event Management

CRN Dept MEX902 Sec 01 www.MsWilkerson.com

Course Syllabus

Instructor: Charmaine Wilkerson

Course Objectives

This course will provide you with tools to improve the effectiveness of your special events. Develop your skills as an Event Manager as you identify the potential challenges to a successful event and select appropriate solutions. You will be provided with essential information for success for developing profitable planning strategies, identifying event goals and objectives, working with planning committees, and managing volunteers. You will learn to improve service quality while maintaining budgets, and how to market your event.

Class Meetings

We will have 1 class meeting on a Saturday. The class meets from 09:00 AM to 4:00 PM, in the EE Building.

Course Outcome

By the end of this course, you will be able to identify:

- What is Event Leadership and what it takes to be an Event Leader
- Event Management Specialties and which ones are suited for you as a career choice
- Stages of Event Management
 - Research
 - Design
 - Planning
 - Coordinating
 - Evaluation
- Behind-the-Scenes scenarios to avoid
- True-to-life stories to learn from
- Final Project at end of class: Plan an event in groups and include your WOW!
- Much more!

Grades

You will be given a **Credit** or **No Credit** grade at the end of the class. If you attend 100% of the class AND participate you will receive credit.

Certificates

Certificates will be given to those students who attend at least 100% of all classes.

Contact Information

You can send me email at ahlilly@me.com

Our Class Website: www.MsWilkerson.com



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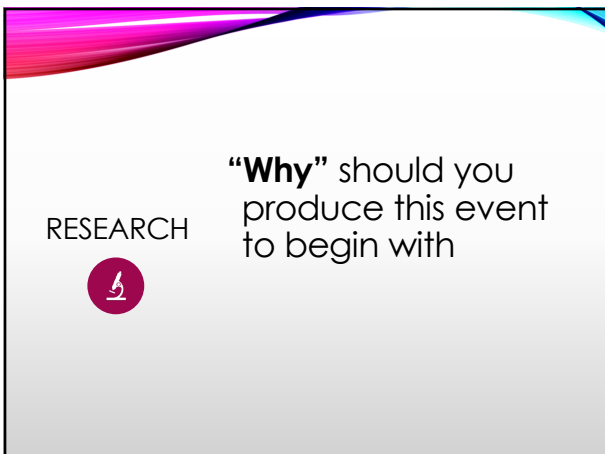
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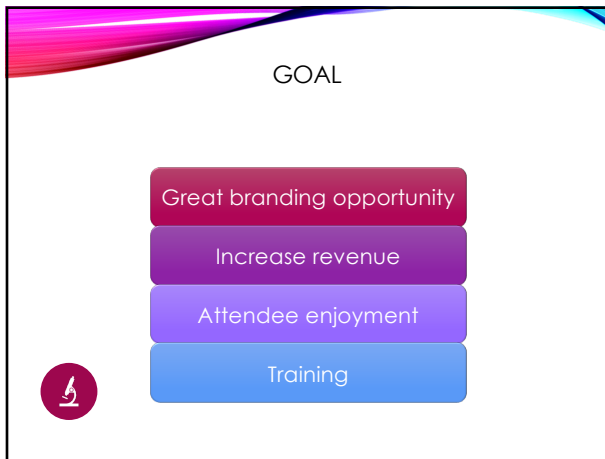
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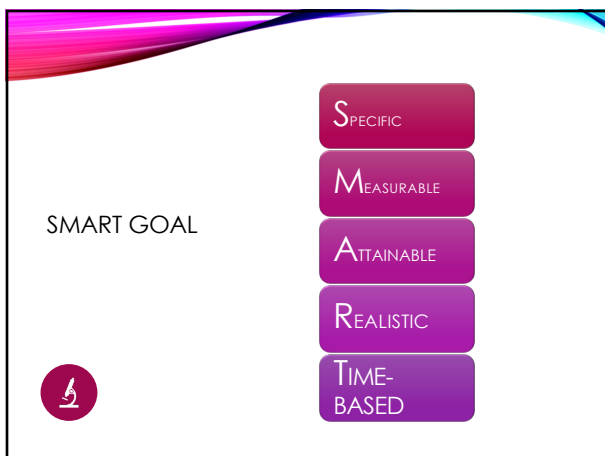
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KPI

KEY PERFORMANCE INDICATOR


It's the activity that will provide measurable results also known as Event Metrics




SOCIAL MEDIA
ENGAGEMENT




REVENUE




ATTENDEE
SATISFACTION



COST PER
CUSTOMER
ACQUISITION




NET PROMOTER
SCORE (NPS)



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EXAMPLES OF KPI'S ACROSS MEETING TYPES

Event Type	Goal	KPI
Internal Staff Training	Higher levels of customer satisfaction	Feedback scores from customers working with employees attending training vs. those that did not participate
Exhibition	Shorter lead time to secure business	Comparing closing times with customers attending exhibit vs. those not attending
Corporate Sales Meeting	Increase of sales for meeting participants	Sales figures for participants compared to those that didn't participate in the meeting



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Return On Investment




ROI = $\frac{\text{Event Revenue (value)}}{\text{Event Expenses (cost)}}$

Example
Revenue: \$50K
Expenses: \$35K

$\frac{\$50,000}{\$35,000} = 1.43 \times 100$

ROI = 143% or 1.4x



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RESEARCH

“Who” will be the stakeholders

Internal - board of directors, committee members, staff

External - Sponsors, guests, donors

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RESEARCH

“When” will the event take place.

“Where” will the event be held

Time of year may influence location, i.e. outdoors vs. indoors affects your event management time frame. Affects your own event management time frame

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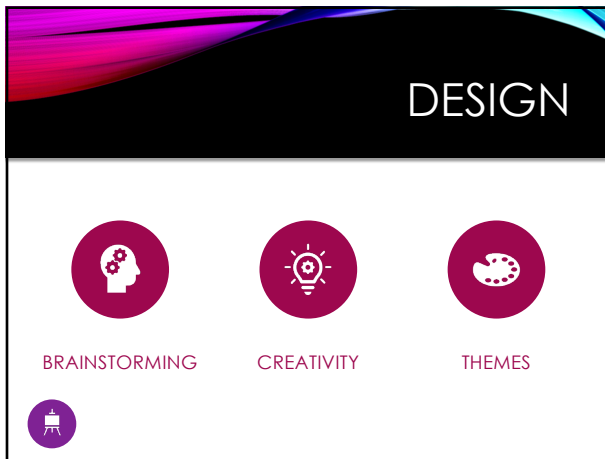
RESEARCH

“How” will your organization fund the event. This will also determine some of the W's.

Budget - having it determined is crucial to producing a successful event

Contract – NEVER do an event without one!

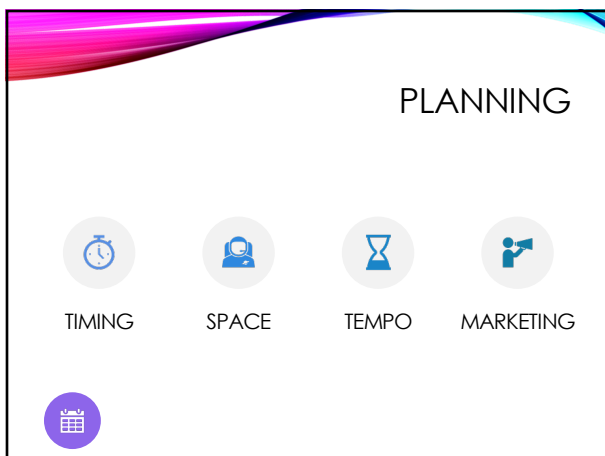
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TIMING

Timing involves the question "When" do you plan to hold your event.

As the conductor, the Event Manager, is responsible to determine if the planning process is feasible



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Location - Site inspection



Space of time between critical decisions

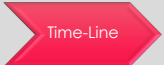
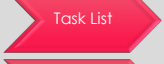
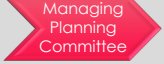
SPACE




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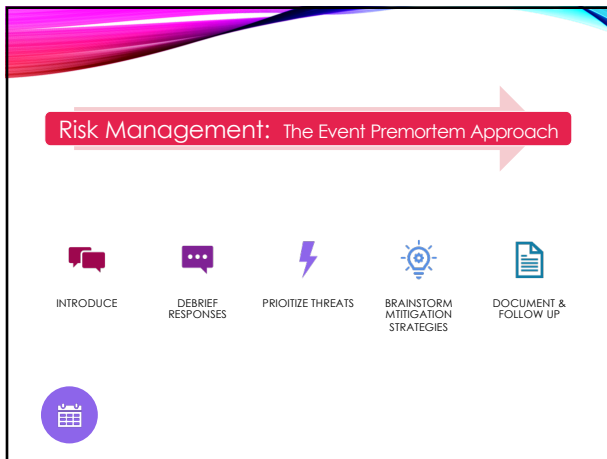
TEMPO

Tempo is the rate at which events take place during the planning stage



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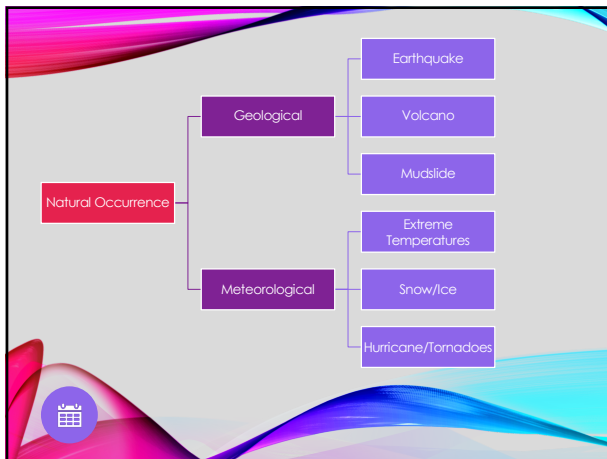
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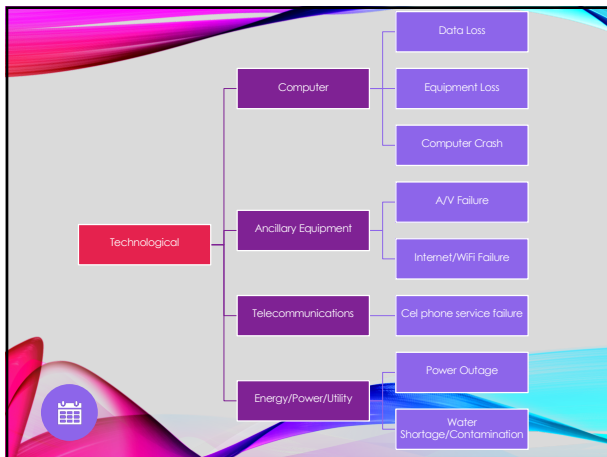
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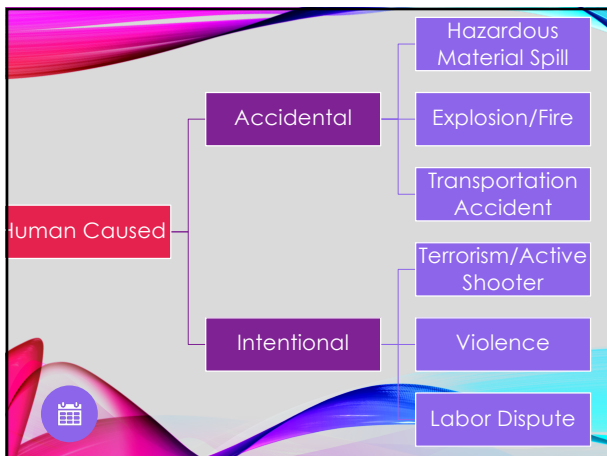
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RISK CATEGORIES

REASONS FOR FAILURE "WHAT COULD HAVE CAUSED THIS"	LEVEL OF CONCERN 1 = LOWEST 5 = HIGHEST	ACTION STEPS TO PREVENT IN THE FUTURE "WHAT CAN I DO DIFFERENTLY"
Speaker doesn't show -flight delays	5	Agenda item moved to a different time/day



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CRISIS MODEL OF REAGAN LIBRARY OPENING CEREMONY

Potential Risk	Category (N, H, T) *	Probability (1 (low) to 5 (high))	Consequences 1 (low) to 5 (high)	Total
Sound system malfunction	T	1	5	6
Terrorism	H	4	5	9
Violence (assault, fight, shooting)	H	5	5	10
Earthquake	N	1	5	6
Power outage	T	1	3	4

*N = naturally occurring, H = human-caused, T = technology



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RISK PLANNING

Mitigation - putting in place measures that will:

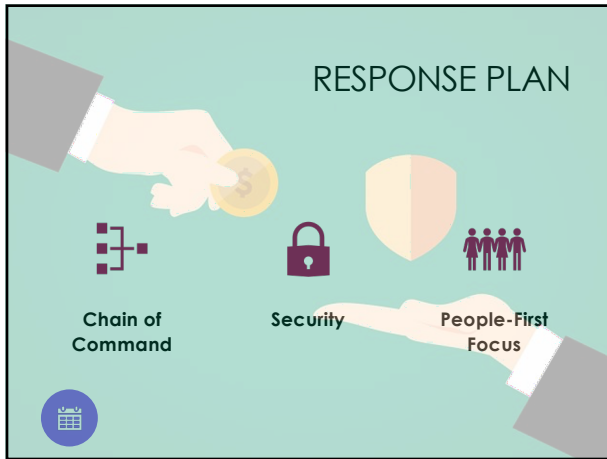
Reduce the **probability** that the crisis, disaster, or emergency will occur

Reduce the **consequences** if the crisis, disaster, or emergency does occur

Transfer all or some of the risk to another party



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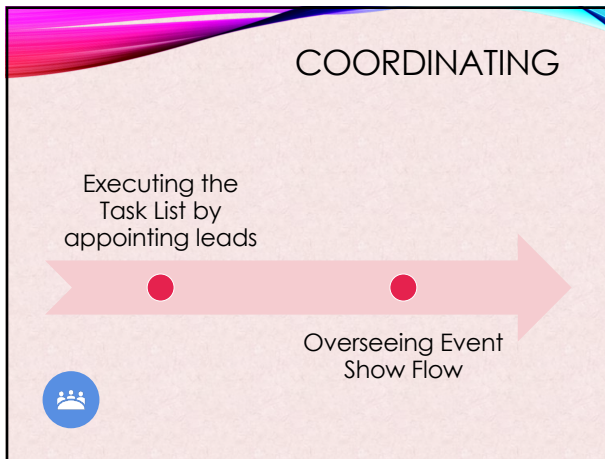
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Crisis Response Team

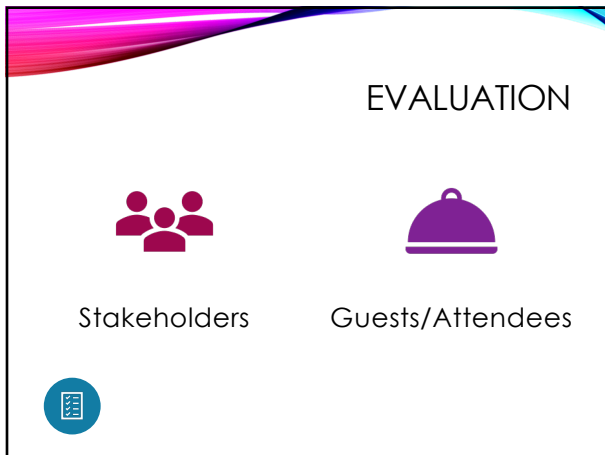
Standard elements of a meeting risk-management plan include a chain of command that defines the members of the **crisis response team** and the responsibilities of each team member, a crisis communication plan naming specific spokesperson(s), contingency plans for high-probability disruptions, and a description of when and how the onsite response to disruption should be implemented.

	Title	Organization	Contact Info	Responsibility
	Event Manager			1 st line of contact
	Head of Security			Venue
	Director of Operations			Overall operation
		(Local hospital)		

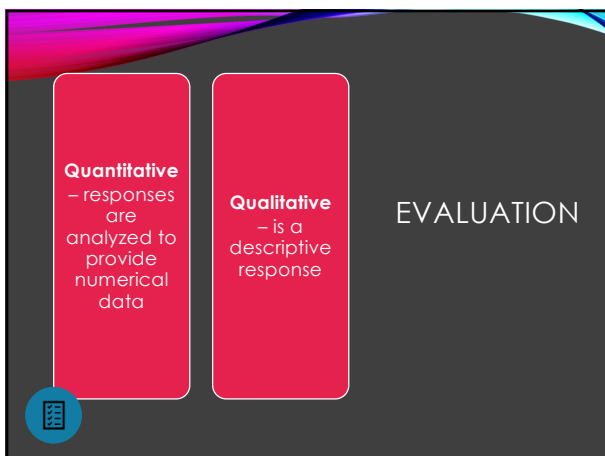
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POST MORTEM

A project **post-mortem** is a process for evaluating the success (or failure) of an event's ability to meet the **goals**. A typical **post-mortem** meeting begins with a restatement of the event's SMART Goals.



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BUZZ


Event Solutions Idea Factory

event-solutions.com

The Special Event

thespecialeventshow.com

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Sales Techniques

Perhaps you find the idea of sales techniques in connection with such basic human pleasures as eating and drinking a bit cold. Perhaps you envision trying to sell a bloody Mary to the nice old lady who comes in every day for a cup of coffee because it yields a better profit. You probably do not like this idea. Do not worry. Sales techniques do not require recommending something against your better judgment just to make more profit. Sales techniques are actually exactly the opposite. They help you learn to judge customers and approximately how much they are willing to spend and to make your recommendations accordingly. Sales techniques are obviously tools to increase profits. Using these tools requires sensitivity. If your efforts ring false to the guests, you will always lose them forever. If you hit the right note with your guests, they will perceive your efforts as nothing more than sympathetic, acceptable consideration.

Awards Banquet

Income

100 Registrations	
101 Pre-registrations	25,000
102 Regular registrations	50,000
103 Door sales	5000

Subtotal \$80,000

200 Marketing	
201 Sponsorships	15,000
202 Advertising	10,000
203 Merchandise	5000

Subtotal \$30,000

300 Investments	
301 Interest income	1000

Subtotal \$1000

400 Donations	
401 Grants	5000
402 Individual gifts	10,000
403 Corporate gifts	25,000

Subtotal \$40,000

Total income \$151,000

Expenses

100 Administration (Fixed expense)	
101 Site office furniture rental	1000
102 Site office supplies	1000
103 Site rental	3000
104 Site telephone expense	1000

Subtotal \$6000

200 Printing (Fixed expense)	
201 Design	3000
202 Printing	5000
203 Binding	1000

Subtotal \$9000

300 Entertainment (Fixed expense)	
301 Talent fees	10,000
302 Travel and accommodations	1000
303 Sound	2000
304 Lights	2000

Subtotal \$15,000

400 Food and beverage (Variable expense)	
401 300 dinners @ \$50	15,000*
402 Open bar for one hour	3000*
403 Ice sculpture	500

Subtotal \$18,500

*Note: Includes taxes and gratuities.

500 Transportation (Variable expense)	
501 Staff travel	1000
502 Valet parking	750

Subtotal \$1750

600 Insurance (Fixed expense)	
601 Cancellation	1000
602 Host liability	500

Subtotal \$1500

Total expenses \$51,750

Total variable expense \$29,250

Total projected income \$151,000

Total projected expense \$51,750

Gross retained earnings \$99,250

Percentage of fixed overhead \$25,000

Net retained earnings (reinvestment) \$74,250

EVENT TASK LIST

Event Title & Date			
Logistics	Staff Assignment	Contact info	Complete Date
Prepare projected event budget and submit for approvals			
Determine catering needs & place order(s)			
Catering, rentals, lighting, AV site visits			
Reserve equipment			
Finalize menu selections			
Finalize catering order numbers			
Order any gifts for speaker and/or attendees			
Check with photographer for availability			
Secure volunteers and/or student ambassadors			
Program & Speakers	Staff Assignment	Contact info	Complete Date
Finalize speakers for event			
Contact speaker to discuss event – equipment needs, style of lecture, etc.			
Send draft scenario with suggested bullet points and send to VIPs for review			
Contact VIP offices to work on desired speaking points – they may request assistance with content			
Send final scenario and guest list to relevant volunteers and staff			
Submit final event scenario, current guest list, table seating assignments and seating diagram to VIPs			
Finalize presentation and load presentation on laptop/flash drive			
Send any updates to relevant volunteers and staff			
Printed Materials & Mailings	Staff Assignment	Contact info	Complete Date
Determine # of projected guests, invite groups and any research requests that may be necessary to create guest list			
Create invitation lists – contact VIP offices for any additional invitees they would like to include			
Create invitations and send to appropriate staff for review and approval			
Obtain a quote from printing company			
** If the Chancellor's names will be used on the invitation, please see the Special Events website for requirements on printed materials			

EVENT TASK LIST

Finalize invite lists			
Send invitations to printer			
Stuff invitations, seal and stamp			
Send out invitations			
Update RSVP list and cross reference name spellings with invite list			
E-mail or call those invitees who have not responded			
Submit Guest list, final table guests with bio information and seating diagram to VIP's			
Copy handouts			
Finalize guest list and send to VIPs for review			
Printed Materials & Mailings	Staff Assignment	Contact info	Complete Date
Prepare packets			
Finalize seating chart			
Send reminder email to attendees/call RSVP list			
Handle any last minute RSVPs			
Day-of Logistics	Staff Assignment	Contact info	Complete Date
Supplies & Materials			
Reserved signs			
Talking points			
Guest List - Alphabetical by last name and another list by table #			
Table diagram			
Event scenario			
Nametags			
Programs			
Staffing flow			
Event supplies			
Backup computer			
Presentation			
Foam trays for nametags			
Gift/Favors			
Event Flow			
On-site Management - catering, AV, rentals, etc.			
Registration & guest Relations			
Program & speakers			
Clean-up			

Final Event Show Flow

Time	Action	Screens	Audio	Notes
3:55 -4:00	Photo Slide Show	Photo Slide Show "Submitted Presentations – title page montage"	Music from slide show	Need to take title pages and make a slide show montage and music. Do we have this done yet?
4:00	Voice over welcome and introducing host	BMC Title Slide	VO by Scott Petersen	"Students, Faculty, Contestants, Entrepreneurs, Sponsors, Mentors and Guests, welcome to the 2011 Business Model Competition Finals. Introducing your Emcee for the evening, let's give a big welcome to Mr. Keith McCord, KSL News anchor and Reporter and emcee extraordinaire."
4:01	Welcome Opening Remarks	"	Keith McCord (per script)	Wireless or podium microphone? Includes recognition of workers, sponsors, etc.
4:05	Nathan Furr	"	Nathan Furr	
4:10	Presentations –	"		
		"	Background music – upbeat and energetic	Queue first presenter
4:15	Presenter(s) for Company #1 goes to stage	PPT for Company #1 Textwaiter		Order of presenters: 1) Textwaiter 2) Kalood 3) MealDrop 4) Gamegnat
4:30	Presentation and Q&A ends Set up next Company	"	Background music – upbeat and energetic	
	Presenter(s) for Company #2 goes to stage	PPT for Company #2 Kalood		
4:45	Presentation and Q&A ends Set up next Company		Background music – upbeat and energetic	

..... **Staff/Committee**
After-Event Evaluation Form



**Sample
Internal-
Staff/Committee
Evaluation Form**

Pre-event planning, promotion, publicity:

(Was there enough time to plan, what could have been improved, etc.)

Set-up:

(Was there sufficient time, staff, volunteers, etc.)

Vendors:

(Did vendors perform as agreed, were they on-time, professional, organized)

On-site details:

(How did the event run, any glitches, problems; explain)

Additional comments/lessons learned/key successes:

Was your time utilized effectively?

This is the form given to all staff/committee members to comment not only on the event on-site, but the pre-planning as well.

Exceptional Events: Concept to Completion



Sample Client Feedback Form

This is the form for event planners to send to their clients (could be adapted for sponsors as well).

..... Client Feedback Form

At (your company) we focus on excellence and customer service in special events. Please take a minute to help us continue to improve our services by completing the following evaluation.

Event Name: _____ Date: _____

Using the scale of 5 "strongly agree" to 1 "disagree", please rate "your organization" on the following statement:

		<u>SA</u>	<u>A</u>	<u>U</u>	<u>D</u>	<u>SD</u>
1.	The overall event met my expectations	5	4	3	2	1
2.	The staff was professional and courteous	5	4	3	2	1
3.	Event Manager was professional, well organized and easy to work with	5	4	3	2	1
4.	On-site production crew managed details efficiently and professionally	5	4	3	2	1
5.	Event planning was concise and easy to understand	5	4	3	2	1
6.	The final report provided good documentation of details	5	4	3	2	1
7.	"Company" resources/creativity added to my event success	5	4	3	2	1
8.	I would use (your company) again for another project	5	4	3	2	1
9.	I would refer (your company) to another business associate	5	4	3	2	1

What I really liked about (your company): _____

What (your company) could improve: _____

Upcoming projects I could use (your company's) help with: _____

Other company that could use (your company's) services: _____

Thank you for your feedback. Please fax this form to xx or mail to:
(your address).

We appreciate your business!

EVENT MANAGEMENT AGREEMENT

THIS AGREEMENT ("Agreement") is made and effective this ____ day of January 20____ between And Here's Lilly ("Event Manager") and____ ("Client") with reference to the Annual Awards Dinner (25th Silver Anniversary Celebration) to be held April 27, 20____, at the Century Plaza Hotel, Century City, CA (the "Event").

The parties, intending to be legally bound, agree as follows:

1. Client hereby agrees to hire, and does hire, Event Manager to plan and coordinate the program and presentations for the Event, as set forth on the Event Duties Checklist, attached hereto as Exhibit A and incorporated herein by this reference (the "Checklist").

2. Client agrees to pay Event Manager a fee of \$25,000 (the "Event Management Fee"), to be paid in installments as follows:

First Installment Due January 15, 20____	=	\$5,000
Second Installment Due February 15, 20____	=	\$5,000
Third Installment Due March 15, 20____	=	\$5,000
Fourth Installment Due April 15, 20____	=	\$5,000
Fifth Installment Due April 27, 20____	=	\$5,000

3. Event Manager agrees to perform all services it deems necessary to accomplish the tasks set forth in the Checklist. All services will be performed in a professional manner. Client agrees to cooperate with Event Manager in providing any necessary information regarding the Client that Event Manager requires to perform its duties, as well as a sufficient number of volunteers to assist Event Manager at the Event, as set forth in the Checklist.

4. In addition to the fees set forth in Paragraph 2, Client agrees to reimburse Event Manager for all approved expenses incurred by Event Manager over and above customary expenditures. Reimbursement shall be made upon presentation of receipts. "Customary expenditures" as used herein is limited to Event Manager's administrative costs, normal

overhead, and normal payroll expenses. Out of pocket expenses incurred specifically for the Event will be charged to Client, including but not limited to postage, invitations, labels, event signage, name tags, etc. All reasonable expenses in excess of \$100 will be subject to Client's prior approval, which will not be unreasonably withheld.

5. If Client requests that Event Manager perform any duties other than those specifically described in the Checklist, such as Event going beyond the allotted time scheduled on the Proposal, Event Manager shall be paid \$150.00 per hour for those duties. Client shall make the payment for such additional services within ten (10) business days after receipt of an invoice from Event Manager.

6. Time is of the essence with respect to the making of the payments set forth in this Agreement and a failure to make such payments on time shall be considered a material breach of this Agreement. In the event Client fails to pay any installment within five (5) business days of the installment due date, Event Manager shall have the right and option, in its sole discretion to terminate its performance hereunder, without further liability to Client, and to pursue collection of all accrued but unpaid installments hereunder.

7. Each party agrees to indemnify the other and to hold each other harmless from any liability or threatened liability relating to the Event caused solely by the indemnifying party. Any liability relating to the Event that is not caused solely by one party or the other will be the responsibilities of the parties causing it in proportion to their fault.

8. This Agreement will be interpreted and given effect in accordance with the laws of the State of California.

9. In order to avoid prolonged and expensive litigation arising out of this Agreement, the parties agree that any controversy, disagreement, or claim arising out of or relating to this Agreement shall be resolved by binding arbitration. If and when either party makes a demand for arbitration, the parties agree to cooperate to expedite the arbitration and to

comply with all necessary procedures. The arbitration shall be held before a single arbitrator under the auspices and rule of the Judicial Arbitration and Mediation Services in Los Angeles.

10. This Agreement is and shall be binding upon and inured to the benefit of the parties to this Agreement, and their respective officers, directors, shareholders, employees and successors in interest.

11. The mutual covenants, obligations and undertakings set forth above are the sole consideration for this Agreement. No representations, promises monetary payments, or inducements have been made by the parties other than those that appear in this Agreement. The terms contained herein are contractual and not mere recitals. This Agreement and the Proposal attached hereto, contain the entire agreement between the parties, and any and all prior negotiations, representations, and communications of any kind, whether oral or written, concerning the subject matter of the Agreement are superseded and without any force or effect. This Agreement may not be modified or amended except by a writing executed by both parties.

12. Each party represents that it is executing and delivering this Agreement freely and voluntarily, that that each has received independent legal advice from its counsel or had the opportunity to do so before signing this Agreement.

13. Client shall work with Event Manager to determine a firm budget for the Event.

14. A copy of this Agreement shall have the same force and effect as the original. This Agreement may be executed in counterpart.

15. All parties have cooperated in the drafting and preparation of this Agreement and it shall not be construed against any party.

AND HERE'S LILLY (Client Name)

BY: _____
CHARMAINE WILKERSON

BY: _____
AUTHORIZED REPRESENTATIVE

LILIANA WILKERSON
AUTHORIZED REPRESENTATIVES

EXHIBIT A - EVENT DUTIES CHECKLIST

The duties checked below are included in the Contract dated _____, 20__ by and between And Here's Lilly ("Event Manager") and _____ ("Client") with reference to the Annual Awards Dinner (25th Silver Anniversary Celebration) to be held April 27, 20__, at the Century Plaza Hotel, Century City, CA (the "Event"):

EVENT MANAGER TO ACT AS PRINCIPAL LIAISON ON BEHALF OF CLIENT

- ___ • Event Site Management and Staff
- ___ • (Client) Staff
- ___ • (Client) Event Committee Chair
- ___ • All Vendors providing services to the Event
- ___ • Marketing and Public Relations Firm (if applicable)
- ___ • All Other Staff (including production crew, wait-staff, volunteers, etc.) before and during the event

PRIMARY DUTIES OF EVENT MANAGER

- ___ • Prepare accurate, efficient and detailed event timelines for pre-event and event
- ___ • Negotiate contracts for all catering/bar/décor/logistics at site (w/in budget guidelines/limits)
- ___ • Negotiate contract for all accommodations (including hospitality suites, media/press rooms (w/in budget guidelines/limits)
- ___ • Negotiate contracts for all aspects of event evening production including entertainment, audio-visual requirements & other production issues
- ___ • Negotiate contracts for design, printing and mailing of "save-the-date" cards, invitations and any other promotional material (actual cost of design, printing and mailing is outside scope of contract and will be billed to and paid for Client separately and directly to the vendor)
- ___ • Prepare program scripts
- ___ • Supervise media room and VIP Reception on day of event
- ___ • Prepare and provide detailed instructions, training and timelines to LBA staff, volunteers, Event Committee Chair(s) and other key personnel
- ___ • Provide status updates and analysis reports to Event Committee Chair(s)

SECONDARY DUTIES (INCLUDES SUPERVISORY RESPONSIBILITIES AND "ASSISTS"):

- ___ • Supervise (Client) staff for all assigned duties before, during and after the event
- ___ • Supervise preparation of program book
- ___ • Supervise acquisition of celebrities, entertainers, keynote speakers, master of ceremony, etc.
- ___ • Administer the logistics for all media efforts on behalf of all honorees/nominees in association with the Public Relations and Marketing Department/Firm
- ___ • Supervise all promotional efforts, including all media contacts, advertisements, design/construction of awards/plaques, etc.
- ___ • Supervise all administrative assignments in relation to the event.
- ___ • Supervise post-event move-out and closing of accounts with vendors to the extent of Event Manager's duties.

RESOURCES

Career Resources

1. indeed.com
2. LinkedIn.com
3. hcareers.com
4. MPI Job Bank - mpiscc.com, mpiweb.org
5. ILEA Feature Jobs - careers.ileahub.com

Organizations

1. ILEA - International Live Events Association, ileahub.com
2. NACE - National Association of Catering Executives, nace.net
3. AFP - Association of Fundraising Professionals, nsfre.org

Certifications

1. CSEP - Certified Special Event Professional
Agency - ILEA, ileahub.com
2. CMP - Certified Meeting Professional
Agency - CIC (Convention Industry Council), conventionindustry.org
3. CFRE - Certified Fund Raising Executive
Agency - CFRE International, cfre.org

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