

**Northeasterners, Inc.**

**Convention Planning – Best Practices Manual**

**Final Draft**

**December 10, 2021**

*Edited – 12-11-2021*

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Executive Summary

The Northeasterners, Inc. has enjoyed a long and storied tradition of hosting National Conventions that rotate between our thirteen member chapters. Each chapter is free to add its own flair and flavor to the 3-day event, but there is a basic format and required events that are held every year. There’s a Friday afternoon executive session attended by all National officers as well as delegates and alternate delegates from each individual chapter. **Failure to send a chapter** **delegate to the Executive Meeting results in a chapter fine**. There is also a Friday evening reception open to all Northeasterners and their guests.

On Saturday, there’s a morning continental breakfast and business meeting that is attended by all Northeasterners followed by a Saturday luncheon and evening dinner dance. The spouse’s (called Lords) schedule includes the Friday night reception, Saturday morning/afternoon golf and for non-golfers there’s usually a tour of a sports venue, museum or other attraction that includes lunch.

The National Convention concludes with Sunday morning breakfast and a presentation/invitation to next year’s Northeasterners Convention given by the next year’s Convention host chapter. Golf prizes and trophies are also presented during the breakfast for the golfer with the longest drive, lowest score, and so forth.

This Best Practice Manual offers guidelines and suggestions for planning, budgeting, negotiating contracts (including walk policies and reflagging clauses), food and beverage arrangements, selecting venues, managing the Hospitality Suite, and tips for keeping costs down on decorations, signage, invitations and transportation needed when hosting a Northeasterners National Convention.

Chapters find it much more financially manageable if they begin putting money aside through scheduled annual assessments starting 7 to 8 years before it’s their turn to host a Convention. Conventions can be held outside the city of the host chapter in an effort to find a less expensive Convention site.

Above all, enjoy and respect the Convention planning process. Do invest the time well before you host so that you can have fun and spread the joy when it’s your chapter’s turn to host. If you’re having a good time so will everyone else.

Submitted by the Future Funding Committee

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**Northeasterners Convention Planning - Best Practices Manual**

**Final Draft**

December 2021

I. The National Convention – Statements included in the National Constitution

This section includes all references in the National Constitution that pertain to convening National Conventions.

The National Constitution addresses a number of elements related to the National Convention. They are:

* Date of the National Meeting

National meetings shall be held annually during the third weekend in May or no later than the first weekend in June. National meetings shall avoid the Mother’s Day and the Indianapolis 500 weekends.

* Fiscal Affairs
  + - The hostess chapter receives from National, at the time of the National meeting (no later than May 1), the sum of two hundred dollars ($200.00) or the prevailing amount at the time of the meeting, per active and inactive member.
    - At the time of the National meeting, the hostess chapter receives the sum of five thousand dollars ($5,000) from National. Such money shall be donated in total at the time of the National meeting to the charity chosen by the hostess chapter.
    - The registration fee for attendance at a National meeting shall be two hundred dollars ($200.00) per member and two hundred dollars ($200.00) per spouse or guest.
    - The hostess chapter shall determine the date when late registration begins and ends and shall notify all chapters thereof. The late registration fee shall be an additional fifty dollars ($50). Registration after the final date shall be accepted at the discretion of the hostess chapter.
    - The hostess chapter shall set a deadline for the cancellation of a reservation to the National meeting. Determination of how refunds are handled is at the discretion of the hostess chapter.
* **What Takes Place During the National Meeting**
  + - During the weekend of the National meeting, there shall be a meeting of the Executive Committee prior to the National business meeting, the time for such meeting to be set by the hostess chapter in collaboration with the National President.
    - Each National meeting weekend shall include social events, the number and type to be left to the discretion of the hostess chapter.
    - By tradition, typical events included in the weekend are as follows:

***Friday – Day One***

* Registration
* Hospitality Suite open during the day and after the Friday night event.
* Executive Committee Meeting
* Friday Night Meet and Greet Event

***Saturday – Day Two***

* Registration
* Continental Breakfast
* Golf Outing
* Alternative activity for guests not participating in golf outing
* General Session for all members of the Northeasterners, Inc.
* Luncheon or afternoon event for all members
* Optional activity following the luncheon, i.e., shopping, sightseeing, etc.
* Hospitality Suite, open during the day and after the Saturday night event.
* Saturday night dinner/dance

***Sunday – Day Three***

* Farewell Brunch
* Presentation of awards to golfers
* Invitation/presentation given by the chapter that is hosting the National Convention the following year.
* Hospitality Suite, limited time of operation and offerings.

II. Best Practices and Tips on Managing the Convention; Selecting a Venue; Budgeting and Paying for the National Convention; Developing A Contract with the Venue

Managing the Convention

A key factor in convening a successful Convention is the management of the actual event.

Below, are listed some best practices.

* Conduct an assessment of whether it will be beneficial to employ the services of an Event Planner to manage and plan the Convention. This may be particularly helpful if your Chapter does not have members who are experienced in event planning, Best Practice from the Philadelphia Chapter.
* Use wristbands, lapel pins, tickets or codes to all Convention events to prevent unregistered guests from attending. – Best Practice from the New York Chapter.
* Designate 2 or 3 host chapter members to be responsible for verifying wristbands/lapel pins/tickets or codes and count each person entering each event. – Best Practice from the New York Chapter.
* Limit communication with the hotel in the weeks leading up to the Convention to 2 or 3 members who have the sole authority to make changes. This will prevent upcharges. If you are using an event planner, this person should be the sole person to communicate with the venue. – New York.
* If you do not hire an Event Planner for the planning of the convention, consider hiring an Onsite Coordinator who would handle logistics so members can enjoy the convention. Ideally, they start no later than the Wednesday before the convention. You will need a line item for this individual and additional money for any staff they bring. NOTE: This person should be provided a room on site so they can be available (on call) throughout the weekend. - Cleveland.
* Consider getting college students to help out the week of but especially for the weekend, particularly if they have an interest in Hospitality Management or even if they just want to make some money. Allocate money in the budget for them. - Cleveland.
* Designate a “Back of House” Room that you can use on site starting two (2) days before the convention begins. This room can be used to store centerpieces and décor and can also be used for any set up or bag stuffing/gift wrapping on site. - Cleveland.
* Designate an “Office” that can be used by the Event Planner or Onsite Coordinator. This room would house office supplies, a printer, and registration materials. Since the “Back of House” room can get busy, this becomes a quiet place to organize and handle anything needed. - Cleveland.
* If possible, consider allocating a small office for the National President and national officers. This was very useful for preparing for the Friday meeting in particular. - Cleveland.
* Designate a member to be the chapter liaison for the website. Since the Convention page and Registration are on our national website, it is critical to have someone who insures that everything is written up and posted. It is a lot of work, so if there is a committee to help, that would be ideal. Back out your dates so you allow plenty of time to review what is written and make any corrections or changes before it goes live. - Cleveland.
* Make certain all dates - including when late registration starts and ends - are clearly posted. Consider all the possibilities and plan for them. What if someone cancels a month beforehand, a week beforehand, the day before or the day of the convention? Though our national bylaws leave cancellations and refunds up to the host chapter, it is always best to put it in writing to avoid any issues later. - Cleveland.
* Consider including a COVID plan on the website. Designate a committee to draft the plan and include doctors, hospital administrators, public health officials, and lawyers wherever practicable. Will you require testing before attending? What is your plan with the hotel should someone test positive while they are there? Your plan does not need to be complicated. It just needs to be clear. Once you have a plan, review it regularly to take in to account any changes in your community. Communicate any changes to the membership. - Cleveland.
* Communicate regularly with registrants leading up to the convention. Emails should include registration location, a copy of the itinerary, valet and other parking available on site and the costs. Include a copy of the hotel layout. (Ask the hotel to color code your event spaces.) Provide clear driving directions since GPS is not always reliable. Are there any alternative hotels if your hotel books up? - Cleveland.
* People also appreciate having clear information on attire. Don’t use fun terminology and assume people will know what you mean. Give them ideas and give them plenty of time to shop (in stores or their closets!) Also include a contact person to email for additional questions and information. - Cleveland.
* Set up a chapter email so all communication goes to that email address. - Cleveland.
* Consider dividing committees by categories and having co-chairs over each category. For instance, we organized our committees by Logistics (Website, COVID, Transportation, Marketing/Communication…), Events (Meetings, Friday Night, Saturday Luncheon, Saturday Night and Sunday Brunch), and Ambassadors (Registration & Welcome Bags, Hospitality, Photography, Videography…). Consider splitting up the responsibilities for daytime versus evening Hospitality.
* Include a separate Technology committee. They can liaison with the on-site IT company, the videographer on site, and assist with insuring any presentations are working properly. - Cleveland.
* Set up a Fulfillment Center at someone’s home before the convention. This location can be used for deliveries and for packing and bags and materials in advance. It also simplifies transporting everything to the hotel when it is at one location. - Cleveland.
* The Fulfillment Center also allows you to order items well in advance and start stockpiling them for your event. You may need to rent or bring tables when it is time to put together Registration or Gift bags. Since using someone’s home during several months leading up to the convention is onerous, consider a gift for that person post-convention. - Cleveland.
* Set up a Volunteer Sign Up during the weeks before the convention so everyone has an opportunity to help out before and during the convention.

Venue/Site Selection

* The National Constitution **does not stipulate** that the Convention must be held in a Chapter’s city. Therefore, Chapters located in more expensive cities should consider holding the Convention in a less expensive location within the state or metropolitan area in which the chapter is located – i.e., New York might consider holding the Convention outside of New York City. – Best Practice from the Detroit Chapter.
* Begin identification of the venue (location of Convention) three to five years in advance of the date to secure the preferred location. Develop a list of what requirements the venue must offer and make a list of all needed concessions.
* After you have determined what amenities, requirements and concessions the hotel/venue must offer, prepare and distribute a Request for Proposals (RFP) to those venues that you wish to consider. (See **Exhibit B** in the attached Addendum.)
* When you have received responses from all selected venues, prepare a Site Selection Comparison Chart. This will enable you to see how the venues stack up against each other. (See **Exhibit C** in the attached Addendum.)
* Consider all facets for venue selection: including 1) pricing (costs for rooms, suites, club level etc) 2)costs for Food & Beverage (put together similar sample menus at each possible venue to get an apples to apples comparison), 3) event rooms (size, layout, convenience of finding spaces, what would you have to rent versus what will they supply re: linens, lighting, centerpieces etc). - Cleveland.
* Negotiate!!! Just because they didn’t offer it in the 1st draft of the contract, never sign that contract until you have asked for everything you want. Comp rooms, comp Hospitality food like desserts on Friday, comp for signage, airport transportation for National officers if the hotel has its own car. - Cleveland.
* Have the hotel commit to providing a final bill within a week of the convention, at the latest. - Cleveland.

Budgeting and Paying for the Convention

Paying for the costs associated with hosting a National Convention is a major challenge for all chapters who host the Convention.

There are four primary revenue sources to assist with paying for the Convention. They are:

* Payment from National to the host chapter of $200 per active and inactive member. [Amount as of May, 2021].
* Payment of $5,000 from National for charitable contribution. [Amount as of May, 2021].
* Registration fee of $200 per attendee (member and guest). [Amount as of May, 2021].
* Assessments paid by Chapter members beginning eight to ten years before Chapter is scheduled to host.

To determine how much the Convention will cost, the host chapter begins with developing a projected budget, based on history from previous Conventions. Add about 20% more to costs over what your chapter paid for expenses the last time your chapter hosted the National Convention.

The budget should include projected revenues and expected expenses. Total the projected revenues and projected expenses – the difference between the two will yield an assessment of the short fall between National payments to be received and registration fees anticipated.

This difference provides an idea of what the amount of assessments from chapter members will be. A sample budget (**Exhibit A** is attached in the Addendum to this handbook- (Sample provided by Washington). – Best Practice from the Cleveland and Washington Chapters.

Make sure the budget includes a Contingency Fund for unexpected expenses. Allocate 8% of the total budget. – Best Practice from the Cleveland Chapter.

* Remember to add the service charge to the per person cost for each menu selection. – Best Practice from the Cleveland and Washington Chapters.
* In planning the budget, make a determination as to whether any activities should be paid for separately in addition to the basic registration fee collected. – Best Practice from the Boston Chapter.

Listed below are some of the best practices chapters have employed to pay for the costs of the Convention.

* Begin with creating a budget for the Convention. Be sure to include all costs to be paid by the hostess chapter. These costs include: (Expenses) food and beverage for each event (don’t forget the Hospitality Suite); entertainment for events; transportation for events; cost of teaser presentation for the year prior to the chapter’s host year; decorations; audio visuals; gifts for attendees, etc. – Best Practice from the Washington Chapter.
* Once an estimated budget for the costs has been established, develop an estimate of expected revenues (Income). Typically, each Convention has the following revenue sources: per capita payment from National; registration fees; charity contribution from National; and assessments paid by chapter members. By subtracting the amount received per capita, charitable contributions, and estimated registration fees, you will be able to determine the amount to be provided from member assessments. – Best Practice from the Washington Chapter.
* Begin collecting an established portion of the total assessment annually eight to ten years before the Convention. – Best Practice from the Washington and Detroit Chapters.
* Pursue marketing dollars from corporations in your community, especially those in markets where we have chapters. (As we are not a 501c3, we cannot provide a tax deduction for donations so requesting sponsorship through marketing opportunities will help.) - Cleveland.
* Develop a corporate solicitation letter that explains who we are and the discretionary dollars we have as a community. Determine the marketing opportunities that can be provided, including website, invitations, signage, etc. - Cleveland.
* Given the push for corporations regarding DE&I, frame your pitch to reflect the make-up of Northeasterners. There may be resources that are available to support the convention from DE&I budgets. - Cleveland.
* Pursue in-kind donations from corporations as part of their marketing &/or community dollars. - Cleveland.
* The Convention Budget should be reviewed and revised regularly. Each committee should be given a budget and should submit reports to indicate how that budget is being spent. If a committee finds they have a surplus after they have gotten price quotes for goods and services, then some of those funds can be reallocated as needed. Similarly, if a committee realizes that their costs are more than the budget they were allocated, the chair should submit a request to the Convention chair. - Cleveland.
* The Convention chair, vice or co-chair, chapter president, treasurer and financial secretary should meet regularly to review and revise the budget and to insure committees are submitting costs promptly. - Cleveland.
* Make sure every possible expense is accounted for in the line items and that those line items identify the responsible committee for it. - Cleveland.

Procedures if Chapter is Negotiating Contract

The contract with the venue is a critical element of hosting the Convention. It is important to remember that the contract will govern payment for costs, i.e., food and beverage, hotel room block, concessions, mitigation of attrition and penalties, and all other costs. **REMEMBER** – to explicitly state all pertinent information in the contract. There is considerable turnover in the hospitality industry and if something is not stated within the four corners of the contract it does not exist!

* Include clauses in the contract that limit attrition and exposure to penalties. – Best Practice from the Washington Chapter.
* Set a ceiling on all food and beverage costs . For example, state that there may not be an increase in food and beverage costs greater than 3%. Make sure the menus listing food and beverage costs at the time of the signing of the contract are included as an attachment to the contract. – Best Practice from the Washington Chapter.
* Be sure to state in the contract, the name of the room in which each event will be held. Not specifying this may make it possible for the venue to bump your group from the preferred room. – Best Practice from the Washington Chapter.
* Insure that, even when the event rooms are delineated in the contract, that you cannot be bumped from your rooms if you dip below a certain count. This is particularly important when your chapter is in a larger space in order to allow for social distancing. - Cleveland.

Important Clauses to Include in Hotel/Venue Contract

Walk Policy and Reflagging Clauses

The walk policy should stipulate how “walking” any attendees will be handled. This clause is needed in case the hotel over sells.

The reflagging clause covers what will occur if the hotel changes its ownership designation during your event. Such changes can negatively impact your event. This clause can minimize the negative impact and spell out how the impact will be mitigated. –Best Practice from the Washington Chapter.

Sample Walk Policy

**WALK POLICY.** The Hotel agrees to immediately notify the Group if a real potential exists for the Hotel to be oversold during the event date(s). The Hotel will make every effort to avoid walking the Group’s VIPs, speakers, and other attendees, and the Group will develop a “priority walk list” if members of the Group must be walked. The Hotel agrees that, if a room is not available for a guest holding a guaranteed reservation, the Hotel will pay for (directly or via reimbursement to guest) or otherwise provide:

* Room and tax at a comparable hotel\* (defined as having the same or similar facilities, level of service, amenities, and food and retail outlets) until guest can be accommodated at the Hotel.
* Transportation to the above Hotel, and between the above Hotel and meeting site.
* One long-distance phone call per day, not to exceed five dollars ($5.00) per day.
* Transportation to the Hotel on the day it can accommodate guest.
* Upgrade to executive or concierge/club level guest room or suite, subject to availability (at a minimum, upgrade of one level above guest’s reservation).
* Letter of apology and fruit basket or comparable amenity in guest’s room.
* Credit of the equivalent number of room nights walked to Group’s total pickup.

\*The Hotel will not limit its search for a comparable hotel of the same brand or to properties within the holdings of the Hotel’s owners or management company. The Hotel’s effort to secure the closest comparable hotel is subject to verification by the Group.

The Hotel will work to bring the guest back to the Hotel for the second and subsequent night(s), if available. If the guest must remain at the comparable property for the second and subsequent night(s), the Hotel will pay any difference between the guest room rate for single occupancy listed in this Agreement and the rate for such lodging charged by the comparable property.

The reflagging clause is a clause related to the hotel being sold, rebranded, or changing management.

Sample Reflagging Clause or Hotel Sold/Brand/Management Clause

In the event that the Hotel is sold or will be under a new franchise and/or management contract, during the client’s event, the Hotel must notify the client of this change as soon as the decision is made by the Hotel to make the change. Further, the client within thirty 30) days of discovery or notification of the hotel being sold, rebranded, or placed under new management, shall have the right, but not obligation to cancel the contract and move to another property without any penalty and a refund of all pre-paid fees. Consequently, the new Hotel company must honor the existing contract and make whether concessions the group requires to minimize any negative impact of the sale, rebranding or change in management on the quality of the client’s event.

III. Food and Beverage Arrangements

Listed below are suggested best practices for minimizing the food and beverages costs associated with hosting the Convention.

General Considerations for Providing Food and Beverage for All Events

In planning the food for the events, it is important to weigh the advantages of buffet service over plated meals. Buffet meals are not always less expensive. It is important to go through the hotel pricing and assess buffet versus sit down. Usually, buffet costs can increase because of the number and type of offerings. Plus, if you have a carving station or something similar you have to include the staffing cost – Best Practice from the Cleveland Chapter.

* Make sure that you add the service fee to all per person food costs. This fee can be 25-35%. – Best Practice from the Washington and Cleveland Chapters.

One of the major costs of hosting the Convention is the high cost of wine and alcoholic beverages. To minimize the cost of paying high hotel costs for wine with meals, state in the contract that the wine for the Saturday luncheon and the Saturday dinner dance is being donated and that the group will pay only a corkage fee of a specified amount for wine to be served. This will considerably reduce the cost and allow the host chapter to provide wine at a greatly reduced price. – Best Practice from the Washington Chapter.

* Save money by carefully determining the number of people to guarantee for meals. Based on historical analysis of hundreds of events, no event has 100% of the attendees actually show-up for the event. Most hotels will set for 3% over the guarantee – therefore, you can in most instances, safely submit a guarantee that is approximately 80% of your total registration for the event. This will minimize the chances of paying for meals that are not consumed. – Best Practice from the Washington Chapter.
* Be careful as hotels have started charging a surcharge for meals over the guaranteed amount. Know up front if they have included this language in the draft of the contract and negotiate to remove it. - Cleveland.
* For the Sunday Farewell Brunch, because this is a travel day, attendance tends to be lowest of any other day during the weekend. Therefore, it is probably safe to make the guarantee 70% to 60% lower than the registration total.

Hospitality Suite

* Upon arrival at the hotel, do a little “power tipping’. Determine who will be servicing the Hospitality Suite and tip each houseman or service staff member a $100 plus tip. This will help ensure that throughout your event you will not be charged for ice, setups, etc. – Best Practice from the Washington Chapter.
* Make sure that you clearly define what will be offered in the Hospitality Suite, the hours, etc. – Best Practice from the Baltimore Chapter.
* The Hospitality Suite is typically open Friday afternoon (1:00 – 6:00 p.m.) Lunch is usually provided in addition to alcoholic beverages. After the Friday Meet and Greet event, the Hospitality Suite is open for socializing and drinks. On Saturday, the host chapter usually opens the Hospitality Suite from around 2:00 to 6:00 p.m. It is again open after the Dinner/Dance. – Best Practice from the Pittsburgh and Washington Chapters.
* While there is flexibility in what is served, the standard includes hot and cold finger foods, sandwiches, vegetable and fruit trays, sliced meat and chicken, salads and soft drinks. A variety of desserts is also desirable. – Best Practice from the Pittsburgh Chapter.
* Many hotels will work with your group to provide a custom menu for the Hospitality Suite. Don’t feel like you have to stick with their standard menus. – Best Practice from the Detroit Chapter.
* Serving alcohol in the Hospitality Suite is also standard. The Convention invitation can ask guests what their drink of choice is, i.e., vodka, gin, whiskey and so forth. Use this feedback to stock the Hospitality Suite bar. Many guests use the Hospitality Suite as a key place to reconnect with their Northeasterner friends. – Best Practice from the Pittsburgh Chapter.
* To minimize Hospitality Suite costs, you may wish to budget a specific dollar amount for food and beverages each day. Don’t forget to factor in the cost of bartender if Lords are not acting as bartenders or if the hotel does not allow it. – Best Practice from the Cleveland Chapter.
* Always ask the hotel if you can supplement the bar with outside beverages. You may be surprised by the answer. – Best Practice from the Detroit Chapter.
* One way to bring in some outside food is if the food is “gifts” like a specialty cookie, candy or specialty popcorn with the logo on it. - Cleveland.
* Approach local distributors regarding potential sponsorship of a certain day (or part of a day) of the hospitality suite. Make sure that you have secured this sponsorship then insure the hotel will honor it. The hotel may already use the same distributor. - Cleveland.
* Do not forget to budget for Bartenders and budget for tips for them. - Cleveland.

IV. Miscellaneous – Decorations, Signage, Invitations, Transportation, Etc.

Decorations

* Floral arrangements are generally used at the Northeasterners’ Saturday luncheon, Saturday night dinner dance and the Sunday morning brunch. Flowers at these events are standard. It is common to refresh and reuse Saturday’s floral arrangements at the Sunday brunch. Suggestion to save money - purchase fresh flowers wholesale and make floral arrangements yourselves. Flowers are also used at the registration table, Friday Executive Meeting and Saturday morning continental breakfast and members’ business meeting but can be omitted to be more budget friendly. – Best Practice from the Pittsburgh and Washington Chapters.
* By creating decorations that are in keeping with the theme of the Convention, it will be easier to repurpose the decorations for multiple occasions. – Best Practice from the Pittsburgh and Washington Chapters.
* Utilize the creativity of your members in designing and building centerpieces. Think outside the typical floral arrangement to something that reflects your convention theme and showcases the talent of chapter members. - Cleveland.

Signage

* Signs directing Convention attendees to the locations of the registration desks, Executive Meeting, and various events should be posted. The hotel contract should include 10-12 easels at no cost. Signs will be needed for the Hospitality Suite business meeting, ballrooms, etc. Be sure to include the needed easels in the Banquet Event Orders (BEOs). – Best Practice from the Pittsburgh and Washington Chapters.
* Signs directing Convention attendees to the locations of the registration desks, Executive Meeting, Hospitality Suite business meeting, ballrooms and so forth must also be budgeted. Hotels should provide easels for the signs at no charge. Just make sure the hotel knows that you need them and how many. This information should be noted in the contract. – Best Practice from the Pittsburgh Chapter.
* National now has a GOBO of the logo but you will need to secure the lighting for it. - Cleveland.

Invitations and Save the Date Notices

* As of 2021, it was determined that invitations and save the date notices will be sent electronically. The host chapter is responsible for sending out printed invitations to any members who do not have Email. – Best Practice from the Pittsburgh and Washington Chapters.
* Consider the cost for any videos you plan to use either as part of your Save the Date, on the Website, or at the convention. You will need a line item for videography. - Cleveland.

Transportation

* Transportation is typically needed for the Golf Outing, the Saturday alternative guest event, and events after the luncheon, i.e., shopping, sightseeing, etc. Do not forget to budget for the needed transportation. – Best Practice from the Pittsburgh and Washington Chapters.
* Be sure to develop a transportation schedule. If buses are to shuttle between points the schedule should comfortably allow for more than one trip. – Best Practice from the Pittsburgh and Washington Chapters.
* Be sure to factor in the onboarding and disembarking of passengers in your schedule. Establish a time for people to show up for the bus and a Departure time and make certain the times are clearly marked to avoid issues. - Cleveland.
* Consider how you will handle if someone misses the bus. Be prepared to arrange an Uber or other transportation perhaps by a member. Budget for this situation as well. - Cleveland.
* Be certain the transportation company has working equipment if you intend to use the intercom system on any transportation. Include the requirement in the contract and the need for reimbursement if it fails to work properly. - Cleveland.
* Provide the transportation company with clear bus routes for any tours. Check to see if there are any events occurring during the weekend that could cause road closures or increased traffic. - Cleveland.
* Include driver tips in your budget. Adjust according to their service but be certain you have the cash and that it is given to a designated person to insure tips are distributed. - Cleveland.

Miscellaneous

* Be sure to include line items in the budget for: Registration (bags, gifts, printed materials, lanyards); photography; audio visuals; performers; etc. – Best Practice from the Cleveland Chapter.
* In preparing the Banquet Event Orders (BEOs) carefully note every detail to be included in the set up for each event. This will help prevent items from falling through the cracks – the staff servicing the event go by what is written on the BEOs, therefore, something will be missed if not listed. An example of this is if you do not wish them to pre-set beverages and salad – state this on the BEOs. – Best Practice from theWashington Chapter.
* Request the BEOs be submitted to the Chair in sufficient time to review them. Request at least one week before the convention, even if the count is not finalized yet. BEOs for specific events should ideally be reviewed by the Event Chair as well as the Convention Chair. - Cleveland.
* Label tables in the “Back of House” room so volunteers and staff know what to use for what event. Set up the event tables along the perimeter of the room. Set up tables in the center of the room to use for organizing and packing/wrapping. - Cleveland.
* Budget for lunch and snacks in the Back of House room and the Office in the days leading up to the convention. If possible, have lunch in a separate room from the Back of House. Include costs for snacks, drinks (coffee, tea, water) and lunch in your “Back of House/Office” budget. - Cleveland.
* The Back of House/Office Budget should also include any costs for supplies (scissors, packing tape, copy paper, stapler pens, markers, etc.) Consider bringing or renting a printer with WIFI connection so any last-minute items can be printed without incurring the hotel upcharge or the delay in their turn-around time. - Cleveland.
* Bring or rent an extra dolly for use in transporting items for the weekend. Also confirm that at least one flat bed dolly will be devoted to you for the weekend. Ask about the hotel’s inventory of luggage carts too. The dollies are ideal for transporting centerpieces etc. but luggage carts can help as well. - Cleveland.
* Plan to allocate time post-convention for everyone on site to help with breakdown and pack up of items. (All chapter members should help out!) Request late check out for chapter member rooms where needed. - Cleveland.
* Plan a closing celebration with champagne with chapter members. Determine the room where you will do this celebration in advance and communicate it to members so they know where to go for a toast to a well-done convention. (Budget for the toast.) - Cleveland.
* Consider a suitable gift for those who devoted a lot of time over the years to the convention. Though flowers are beautiful, they would need to be packed up as well and may not be feasible for people with allergies. (Budget for the gift(s)). - Cleveland.

V. Working with CWT Meetings and Events to Conduct A site Search and Secure Contract with Selected Venue

On \_\_\_\_\_\_\_ the National Executive Committee selected CWT as the National Northeasterners, Inc. Venue Sourcing Company.

The hosting chapter may elect to use the services of CWT. Should the hosting chapter decide to use CWT, listed below is an abbreviated summary of the procedures for initiating the venue/hotel search.

Procedures if CWT sources the Venue and Negotiates the Contract

* Host chapter contacts CWT to engage their services and request contract support.
* Host chapter meets with CWT to discuss meeting requirements.
* CWT develops Request for Proposals (RFP) based on meeting space, lodging, Food and Beverage needs, audio visual support, etc.
* RFP is distributed to hotels that meet requirements and site search begins.
* Upon receipt of responses CWT presents hotel availability results, including amenities offered, cancellation policies, attrition, etc.
* Hosting chapter selects 1-3 preferred venues/hotels that meet desired criteria.
* CWT contacts preferred hotels to negotiate any desired changes.
* Final offers from selected hotels are presented to the hosting chapter.
* Hosting chapter selects venue and CWT finalizes draft contract.

Contact Information for CWT Meetings and Events

Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VI. Engaging the Services of an Event Planner

On \_\_\_\_\_\_\_ the National Executive Committee selected Designer Events, Inc. as the National Northeasterners, Inc. recommended Event Planning Company.

Should a hosting chapter elect to use the services of Designer Events in planning its Convention, a summary of the services to be provided and procedures to be followed, is listed below.

* The hosting chapter contacts Designer Events to set up a date to discuss planning needs and event support desired.
* Designer Events, Inc. develops a contract for services with the hosting chapter.
* Designer Events begins executing all activities outlined in contract – activities may include identifying a venue, negotiating a contract, developing branding, a theme and related graphics, establishing a web-based registration site, distributing all save-the-date, invitations and other notices, etc.

Contact Information for Designer Events, Inc.

Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ADDENDUM**

**Exhibit A**

**Sample Budget**

Table

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Table

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**Exhibit B**

**Sample Request for Proposals**



**Washington Chapter**

**Request for Proposals**

|  |  |
| --- | --- |
| **Purpose:** The following meeting specs are submitted to provide you with the information needed to respond with a detailed proposal to provide hotel and meeting facilities for the 2021 Convention of the Northeasterners, Inc. hosted by the Washington Chapter. | |
| **Event For** | Washington Chapter Northeasterners, Inc. |
| **Event Name** | 2021 Convention Northeasterners, Inc. |
| **Event Profile** | Since 1930, the Northeasterners, Inc. has been in existence as a viable women’s club. Thirteen chapters throughout the Northeast, meet regularly and participate in social and civic activities of common interest. Our incorporated organization of over 350 active and life-time members has fostered and maintained strong bonds of friendship and made innumerable meaningful charitable contributions locally, nationally and internationally.  Annually, one of the thirteen chapters hosts the membership and their guests at the Convention. |
| **Attendee Profile** | We expect about 325 guests from the 13 cities where our chapters are located. Of the 325 expected guests, approximately 62% (200 attendees) of the group will be women. The average age range of the Northeasterners who will attend is 50-65 years. However, members range in age from 30 to 90. The membership of the Northeasterners, Inc. is comprised of well-educated professionals such as business executives, physicians, lawyers, educators, dentists, and retirees. |
| **Desired Meeting Dates** | The Convention is scheduled for Friday, May 21, to Sunday, May 23, 2021. |
| **Arrival/Departure Pattern** | Most attendees will arrive on Friday, May 21, and depart on Sunday, May 23, 2021. However, group rates must be available three days prior to the Convention and three days after the Convention. |
| **Anticipated Sleeping Room Needs** | Day One – Friday = 100; Day Two – Saturday = 100  Sleeping room rate to apply to single, double, and triple occupancy. |
| **Reservations** | Individuals will make their own reservations. |
| **Requested Cut-off Date** | Two weeks prior to start date. |
| **Tentative Meeting Room Requirements** | **Presidential Suite (1) –** Check-in Thursday, May 20, Checkout – Sunday, May 23, 2021- (To be used as Hospitality Suite)  **Suites for National President and other VIPs (3) –** Check-in Thursday, May 20, Checkout – Sunday, May 23, 2021  **Friday – May 21, 2021**   * Registration * Meeting room to accommodate hollow square for 40 (Executive Committee Meeting) * Ballroom to accommodate 325-350 at rounds of 10 for Friday night activity * Hospitality Suite   **Saturday, May 22, 2021**   * Registration * Meeting room to accommodate 200-225 attendees, classroom set up, with a head table on a riser for up to 8 with a podium (General Session) * Ballroom to accommodate 325-350 at rounds of 10 for Black Tie Dinner/Dance * Hospitality Suite   **Sunday, May 23, 2021**   * Ballroom to accommodate 325-350 at rounds of 10 for Farewell Brunch/Event * Hospitality Suite   \* 24-hour hold is preferred on all meeting space. |
| **Required Considerations** | * Complimentary Presidential Suite to be used as Hospitality Suite * Three (3) Complimentary Suites to be provided for VIPs * Ten (10) Sleeping rooms to be provided at a discounted rate for Committee Members * 1 complimentary sleeping room to be provided for every 40 room nights picked up * Standing podium and microphone to be provided at no cost for Friday night event, General Session, Saturday night black tie dinner/dance * 15% discount on AV * Meeting space for all events must be designated in contract * Increase in food and beverage costs not to exceed 3% over 2018 prices |
| **Convention History** | * 2015 – Convention held in Columbus at the Hilton Columbus/Eaton * 2016 – Convention held in New Jersey at Caesar’s Atlantic City * 2017 – Convention held in Pittsburgh at the Fairmont Hotel * 2018 – Convention to be held in Boston at the Seaport Hotel |
| **Primary Contacts** | 2021 Convention Co-Chairs  Margo Pinson, 301-656-3284; margodp@ymail.com  Antoinette Price, 301-946-2903; aeprice1@msn.com |

**Exhibit C**

**Site/Venue Selection Comparison Chart**

**Comparison of Selected Hotels for 2021 Northeasterners Convention**

| **What Is Proposed** | **Mandarin Oriental** | **Watergate** | **Four Seasons** | **Notes** |
| --- | --- | --- | --- | --- |
| Available Dates | May 20-21-22 – 2021 | May 20-21-22 – 2021 | June 4-5-6 – 2021 |  |
| Group Sleeping Room Rate | $199.00 plus tax | $319.00 plus tax | $425.00 plus tax |  |
| Total number of room nights blocked at group rate | 330 | 200 | 275 |  |
| Meeting space | All meeting space selected to be designated in contract | All meeting space selected to be designated in contract |  |  |
| Meeting space rental | Waived | Waived | $6,500 ++ |  |
| Food and Beverage terms | 10% discount on 2018 prices | F&B costs not to exceed 3% over 2018 prices | F&B pricing to be confirmed 3 months prior to group’s arrival |  |
| Food and Beverage minimum | $98,000 ++ | $55,000 ++ | $120,000 ++ |  |
| Pick up commitment | 10% allowable slippage – 85% pick up |  |  |  |
| Dates group rate honored | 3 days prior – 3 days after event |  |  |  |
| Sleeping room cut-off | Three week cut-off |  |  |  |
| Hospitality Suite | Function room to be used as Hospitality Suite | Complimentary suite to be used as Hospitality Suite |  |  |
| Complimentary upgrades | 3 Complimentary upgrades to Exec. Suites at group rate | 3 Complimentary upgrades to One-bedroom suites at group rate |  |  |
| Discounted rooms | 5 sleeping rooms discounted by 10% off of the group rate | 10 sleeping rooms at discounted rate |  |  |
| 1 complimentary sleeping room for every 40 | 1 complimentary sleeping **room** for every 50 | 1 complimentary sleeping **room** for every 40 |  |  |
| Audio Visual | 10% AV discount – Standing podium w/mic at no cost for Fri. night, General Session, Sat. night | 15% AV discount  Standing podium w/mic at no cost for Fri. night, General Session, Sat. night |  |  |
| Spa | Spa available at hotel | Spa available at hotel | Spa available at hotel |  |
| Fitness Center | Complimentary use of Fitness Center | Complimentary use of Fitness Center | Complimentary use of Health Club |  |
| Swimming Pool | No | Yes | Yes |  |
| Wi-Fi | Complimentary wi‑fi | Complimentary wi‑fi | Complimentary wi‑fi |  |

June 15, 2018