

# TVET CERTIFICATE V in FOOD AND BEVERAGE SERVICE

**FBSPC 501**

**PLANNING FOR CATERING FOR AN EVENT OR FUNCTION**

**PLAN CATERING FOR AN EVENT OR FUNCTION**

*Competence*



**Credits: 10 Credits**

**Learning hours: 100 Hours**

**Sector: HOSPITALITY AND TOURISM**

**Sub-sector: FOOD AND BEVERAGE SERVICE**

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## **Purpose statement**

This module describes the skills, knowledge and attitudes required for a TVET trainee certificate V, Level V in Food and Beverages service, in order to plan for catering for an event or function. By the end of this module the learner will be able to identify purpose and scope of the event, to Prepare catering proposal for event or function, to Prepare and implement operational plan for the catering of an event or function, in hospitality establishments with minimum supervision.

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## LEARNING UNIT 1: Identify the purpose and scope of the event

### Learning Outcome 1.1 Clarify the purpose of the event or function with stakeholders

#### ➤ Identification of the different stakeholders

Stakeholders are individuals, groups of individuals or organizations that hold a special interest in an event including its operations and success. To a certain extent, stakeholders shape the manner in which event managers conduct an event. Stakeholders include, suppliers, customers, investors and the media, they are very important in an event planning because they can be affected by the event and the event also can be affected by the type of evaluation received by the stakeholders. In order to realize the success of an event, it is important to have open communication channels among all stake holders. Since events have broader impacts on a wider public, such open communications will bring more feedback to the company. It is also important to remember that stakeholders are people with vested interests in the company and its products. They are therefore potential attendees. Stake holders add value and reputation to the success of the whole event. Moreover, getting the right stakeholders to your event can create the prospect of a great evaluation for the future event planning as well. You can find out what the views and thoughts of key people and important stakeholders by engaging in face to face charts with them throughout the event. The following are some examples of stakeholders for an event:

- i) Hotel owners
- ii) Event owner
- iii) Security personnel
- iv) Staff
- v) Suppliers
- vi) Entertainers
- vii) Local community

#### ➤ Categorization of the events or function.

An event is a thing that happens or takes place, especially one of importance. It is a planned public or social occasion or it can be described as a public assembly for the purpose of celebration, education, marketing or reunion.

**The event or function may include:**

- a) Meetings: An assembly of people for a particular purpose, especially for formal discussion.
- b) Conferences: a formal meeting of people with a shared interest, typically one that takes place over several days.
- c) Parties (wedding, birthdays...)
- d) Product launching
- e) Sports events

➤ **The reasons why the event is organized**

**Why Organize an Event?**

**1. Building Relationships**

Organizations are now recognizing the value of building relationships with their key constituents through a variety of events.

Events will help you to:

- ✚ Develop lasting business relationships and build partnerships
- ✚ Keep customers, employees and key stakeholders informed of new business developments
- ✚ Increase employee motivation
- ✚ Turn customers into company advocates
- ✚ Engage with your industry/local community
- ✚ Enhance Your Reputation
- ✚ Events are an important element of the marketing mix; they act as the face of your organization. If executed correctly, they can give you the power to build upon your organizations reputation and promote its aims and key messages.

## **2. Bringing People Together/ Get together**

Events bring people together for a common purpose. Event professionals work to ensure that this purpose is achieved seamlessly. The event planner will create a program that addresses the purpose, message or impression that the organization or client is trying to communicate.

## **3. Time and Money Saving**

Communicating a message to a large number of people can be expensive. By bringing the group together to one central location allows you to save both time and money.

## **4. Business**

Also, people organize events for doing business. They want to make money to help them develop themselves.

## **Learning Outcome 1.2: Identify specific customer needs and preferences**

Customers' preferences are expectations, likes, and dislikes, motivations and inclinations that drive customer purchasing decisions. They complement customer needs in explaining customer behaviour. For example, a customer needs shoes and they'd prefer a particular style, brand and colour.

### **➤ Ways to identify customer needs**

Customers' needs and preferences can be identified through:

#### **1. Starting with existing data**

You most likely have existing data at your fingertips. Review past surveys, customer interviews, and customer-support call logs. There's no point in funding an extensive and expensive research campaign if the data you need is already collected.

#### **2. Interviewing customers**

Go right to the source. Ask customers what problems they have and what features they want. Even when customers can't articulate their needs clearly, you can often gain insights that lead to successful innovations.

#### **3. Analyzing your competitors**

Consider using research firms that might present a more objective face to customers who engage with your organization and its competition. Consider using the SWOT rule: Identify your competitors' ***strengths, weaknesses, opportunities, and threats***

#### 4. Conducting voice of customer surveys

Voice of Customer surveys collect data, from email or from a pop-up on a website, about the attitudes and expectations of existing or prospective customers. Use a mix of open- and closed-ended questions to see what produces the most useful data.

Although customers aren't necessarily good at identifying their needs, this type of survey often yields data from which you can discern customer goals, challenges, problems, and attitudes, and then recommend opportunities for improvement.

#### 5. Interviewing stakeholders

Why not begin with the data you don't have to pay for: the collective knowledge stakeholders have. Start with sales and support teams. They know the product and the customer. They often have a list of feature requests, bug reports, and enhancements — straight from the customer's mouth.

#### ➤ Customer needs and preferences examples:

Here below are examples of customers' needs:

- a) **Quality Products:** “means to incorporate features that have a capacity to meet consumer needs (wants) and gives customer satisfaction by improving products (goods) and making them free from any deficiencies or defects.
- b) **Quantity of the products:** The amount of that product available, or currently available for customers. This should be enough to satisfy your customers.
- c) **Quality Services:** the value of service to customers
- d) **Location:** You've probably already considered this. For a local event, you may be looking for a venue within a reasonable distance from most attendees' homes or places of work.
- e) Table Style

f) Time management

➤ **Group customers according to their needs and preferences:**

A customer group is sort of a label that you can assign to customers in order to group them under certain criteria. You can create as many groups for your customers as you need (VIP, wholesaler, retail, repeat customer, friends and family, etc.) and assign customers to them. A customer can belong to one group only.

Groups may be used to:

- ✚ Control what prices are displayed to customers. Each group has a Price Id attribute.
- ✚ Enable promotions. Promotions may be enabled for customers belonging to a particular group. i.e. You may want to enable certain promotions just for your retail customers.
- ✚ Send communications. Bulk emails may be sent to only customers belonging to a particular customer group. Mailing Lists can be created containing only customers belonging to a particular customer group.

### **Learning Outcome 1.3: Determine catering requirements**

➤ **Identification of different catering requirements**

When planning and organizing an event, you need to think about the following things:

1. Equipment
2. Personnel
3. Materials
4. Venues
5. Time
6. Number of customers
7. Category of customers

## ➤ **Procedures/ways involved in determining requirements:**

### ❖ **Research the market place**

Market research is an organized effort to gather information about target markets or customers you want.

### ❖ **Identify the potential customers**

Potential Customer is someone who is capable of becoming a purchaser of product and/or services from an organization. The key group of potential Customers, is known as your Target Audience, the group of people or organizations who are most likely to buy from your company.

### **How to identify potential customers?**

Before launching a new business venture or a product, you need to identify your potential customer base. In order to modify your product/service idea according to the needs of your prospective customers, you need to know them better. Defining the target market for your business will also help in efficient utilization of your marketing and advertising resources. Customer profiling works well for all sorts of businesses, it gives you a competitive edge to proactively communicate with your prospects and serve them in the best possible manner. Here are a few smart tips that you can make use of while identifying your potential customers.

#### **1. Get Familiar with Demographics**

The first and most important step towards defining your target market is creating a demographic profile of your customers. The age group, gender, location, marital status, occupation and annual income are the basics to start with. For example, a clothing brand launching a funky clothing line would identify its customers as young girls and women aged 15-25, a beverage brand launching an energy drink would define its target customers as men aged 18-30 plus.

#### **2. Evaluating the Psychographics**

After you have familiarized yourself with the demographics of your prospects, you need to evaluate their psychographics which include personality traits, social norms, values, interests and lifestyle. In order to make your product/service launch a success, you need to evaluate how your product/service can make a difference to the lifestyle of your potential buyers.



### **3. Do Research on Successful Competitor Brands**

The simplest way to identify your prospective customers is to do research on your successful competitor brands. Niche marketing is much more promising, so do have a look at your competitor's target market but search for niche markets that you can pitch to.

### **4. Analyse your Product to see who will buy it**

Another insightful tip to know your prospects is to do a product analysis. Define the benefits of your product and then analyse who would want to buy such a product.

### **5. Read Industry Blogs and Forums**

You can conveniently search for your potential consumers online by reading the relevant industry blogs and forums. In the current digital era, customers love to comment on blog posts and forums, you can visit top rated websites of your industry and see what kind of customers are commenting on their blog posts and participating in the forum discussions. You can use social media as well to identify your prospects. Although time consuming, online search would save you a lot of money and in the current era it is easier to build relationships with customers online.

#### **❖ Choice your niche**

A niche market is the subset of the market on which a specific product is focused. The market niche defines the product features aimed at satisfying specific market needs, as well as the price range, production quality and the demographics that it is intended to target. It is also a small market segment

#### **❖ Write a business plan**

A business plan is a formal written document containing business goals, the methods on how these goals can be attained, and the time frame within which these goals need to be achieved.

### Learning Outcome 2.1: Collect operational information exhaustively for the event and venue

#### ➤ Identification of the different sources of information for the venue and events

You can collect information for the venue and events from different sources such as:

1. Magazines Serves as a resource for event professionals who design & produce special events (including social, corporate & public events) in hotels, resorts, banquet facilities & other venues.
2. Website
3. Newspapers
4. Events
5. Colleagues
6. Customers
7. Staff

#### ➤ Different channels to use to collect the information

1. **Internet:** This is a global computer network providing a variety of information and communication facilities, consisting of interconnected networks using standardized communication protocols. It can be used to gather information for the event you need.
2. **Telephone:** this is a system for transmitting voices over a distance using wire or radio, by converting acoustic vibrations to electrical signals. Telephones can also be used to collect information for the event.
3. **Face to face:** If you come **face to face** with someone, you meet them and can talk to them or look at them directly. You can use face to face to collect data on event.
4. **Written documents:** which provide information (especially information of an official nature)

#### ➤ Categorization of the information according to the venue and event:


1. Accessibility

It is always important to make sure your event is easily accessible. Make sure there are clear pick up and drop off areas for attendees, clear directions on how to arrive at the venue, and ample parking space if needed. Your attendees should be able to focus on the content of event rather than worry about getting to their destination. Keeping in mind wheelchair accessibility is also crucial for ensuring an inclusive event experience.

## **2. Size of the venue**

You'll need to know the capacity of the venues for a few reasons.

 **How many participants the venue can accommodate?**

 **What are the F&B Minimums?** If your venue offers food and/or beverages and sets a minimum food and beverage spending amount (known as an F&B minimum), ensure that the past F&B records from the previous events are in line with the minimum.

## **3. Service type offered**


The service type offered helps to answer the following questions:

 **Does the venue have a kitchen and can it provide catering to your event?**

If so, often a venue will waive the facility fee and only charge a down payment along with the cost of food for each attendee. Those venues without kitchen facilities may have a partnership with a food provider that you're required to use. You may want to check their food in advance. If it is not good enough, it can create a negative impact on your attendees' experiences. So, either go with a venue that serves great food or allows you to bring in outside food vendors.

 **Does it have tables, chairs and linens you can use?**

If a venue has these items, you can save a great deal of money and effort by using what they have, assuming it matches your theme and ambiance.

 **Does it have a setup/clean up?**

If you've found a venue which provides a setup and clean-up crew, rejoice! This isn't always the case. If these services aren't available you'll need to build your event team or find volunteers.

 **Does it have AV capabilities?**

Some venues have a built in audio-visual equipment for you to use, and others will require you to bring that in yourself

## **4. Service standard**

Service standards are important for customers, potential customers, employees and management of a business (events). They help to define what a customer can expect and to remind management and employees of the challenge and obligations that they face

5. Number of participants

6. Price

## **Learning Outcome 2.2: Analyse operational factors influencing catering and consultation with stakeholders to determine overall approach**

### **➤ The factors that can influence catering:**

The following are factors which can influence catering services:

a) Price

Charging enough but not too much for your event is key to ongoing business success. It's important for first-time business owners, therefore, to proceed with caution as they begin to estimate the cost of holding events. The goal in pricing a service is to mark up your labor and materials costs sufficiently to cover overhead expenses and generate an acceptable profit.

b) Equipment availability

c) Overall Budget

d) Nature of venue

e) Type of events

f) Time period

g) Audience or market profile

h) Communication channel

i) Procedures involved

j) Numbers of participants

k) Duration

l) Date and time

m) Purpose of event

- n) The theme, concept and style

## **Learning outcome 2.3: Contribute ideas to the event concept, theme and format and incorporation of creative elements into the catering proposal**

### **➤ Identification of the different ideas to the events:**

#### **1. Sitting plan**

A seating plan is a diagram or a set of written or spoken instructions that determines where people should take their seats. It is widely used on diverse occasions. Seating plans have a wide range of purposes.

### **Seating Arrangements Used for Events**

#### **1. Theatre**

- ✓ This is the simplest style, reflecting the seating found in a theatre or cinema with chairs aligned in consecutive straight rows.

##### **Positives:**

- ✓ All of the seats are facing forwards towards the front of the function room.
- ✓ Maximum seated capacity is achieved for the function room.

##### **Negatives:**

- ✓ The audience is closed in, needing to push past other audience members to enter/exit the seating area.
  - ✓ There is no provision for note taking or consumption of plated food and beverage.
  - ✓ Audience interaction is hindered as audience members don't face each other.
- This seating arrangement is popular for **meetings, Annual General Meetings, product launches**.

#### **2. Classroom**

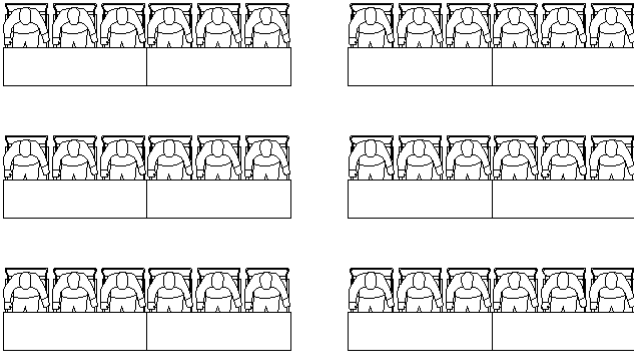
This style reflects the seating found in a school or lecture theatre, with chairs and trestle tables aligned in consecutive straight rows.

##### **Positives:**

- ✓ All of the seats are facing forwards towards the front of the function room.
- ✓ Allows for note taking and consumption of plated food and beverage.

### Negatives:

- ✓ Again the audience is closed in, making it difficult for audience members to enter or exit
- ✓ Seating capacity is reduced by the trestle tables.
- ✓ Audience is less likely to interact as they are not facing each other.
- ✓ It is Popular for training, conferences, sales kick-offs and product launches.



### 3. Herringbone

This style is very similar to Classroom, however each consecutive row of chairs and tables are angled inwards.

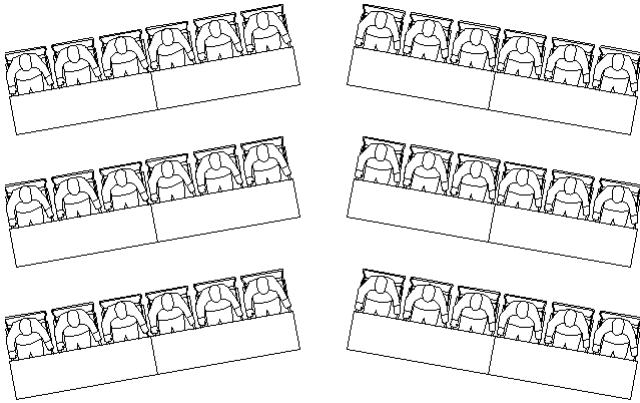
### Positives:

- ✓ All of the seats are angled inward towards the podium.
- ✓ All of the seats are facing forwards towards the front of the function room.
- ✓ Allows for note taking and consumption of plated food and beverage.

### Negatives:

- ✓ Again the audience is closed in, making it difficult for audience members to enter or exit.
- ✓ Seating capacity is reduced by the trestle tables.
- ✓ Audience is less likely to interact as they are not facing each other.

It is popular for training, **conferences**, and lectures.



## 4. U Shape

As the name suggests this style is in the shape of the letter U, with the tables & chairs arranged in an open ended configuration with the audience facing inwards.

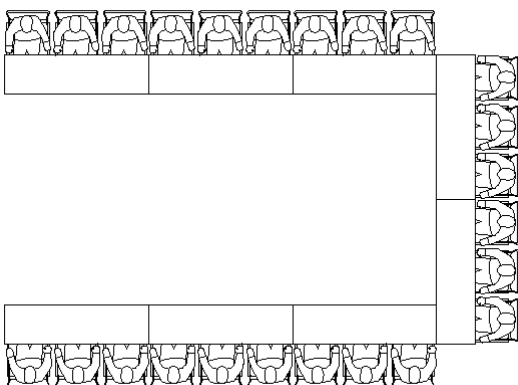
### Positives:

- ✓ The open end allows for a focal point or presentation area.
- ✓ Allows presenter to approach and engage with each audience members.
- ✓ Audience interaction is enhanced, with audience members facing each other.

### Negatives:

- ✓ Inefficient use of floor space, with seating capacity reduced.
- ✓ A large proportion of the audience are seated side-on to the presentation area.

It is popular for training, workshops, and small **meetings**.



## 5. Horse Shoe

This style is very similar to U Shape, however there are no tables, only chairs arranged in an open ended configuration with the audience facing inwards.

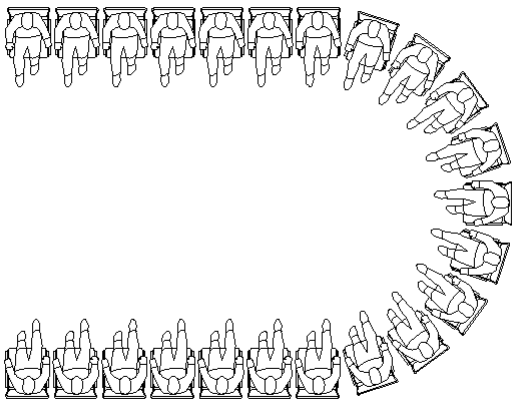
### Positives:

- ✓ The open end provides a focal point and allows for a presentation area.
- ✓ Allows presenter to approach and engage with each audience member.

### Negatives:

- ✓ Inefficient use of floor space, with seating capacity reduced.
- ✓ There is no provision for note taking or consumption of plated food and beverage.

It is popular for large meetings, presentations, team briefings



## 6. Hollow Square

This style is similar to U Shape, however there are four sides and no open end, with the audience all facing inwards.

### Positives:

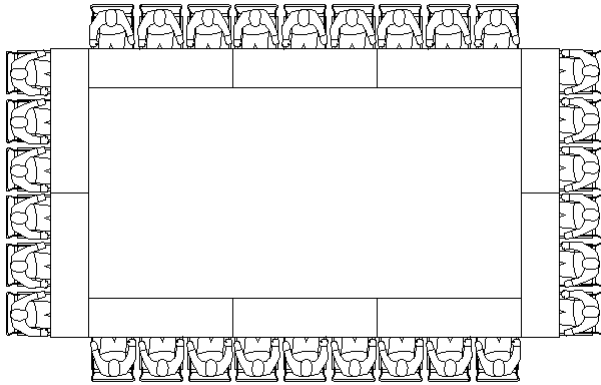
- ✓ Audience interaction fully enhanced, with audience members all facing each other
- ✓ Allows audience to consume plated food and beverage easily

### Negatives:

- ✓ Seating capacity is reduced
- ✓ Does not allow for a main presentation area or focal point.

It is popular for discussions.





## 7. Boardroom

This style is a smaller version of the Hollow Square or U Shape, however there is a large elongated table, with the audience all facing inwards.

### Positives:

- ✓ Encourages audience interaction as they all face inwards

### Negatives:

- ✓ Restricts the position of a presentation area or focal point, typically to the end of the table

It is popular for small **meetings**, one on one interviews, small presentations, team briefings.



## 8. Banquet

This style is similar to a round dinner table, with the audience seated around the circumference facing inwards.

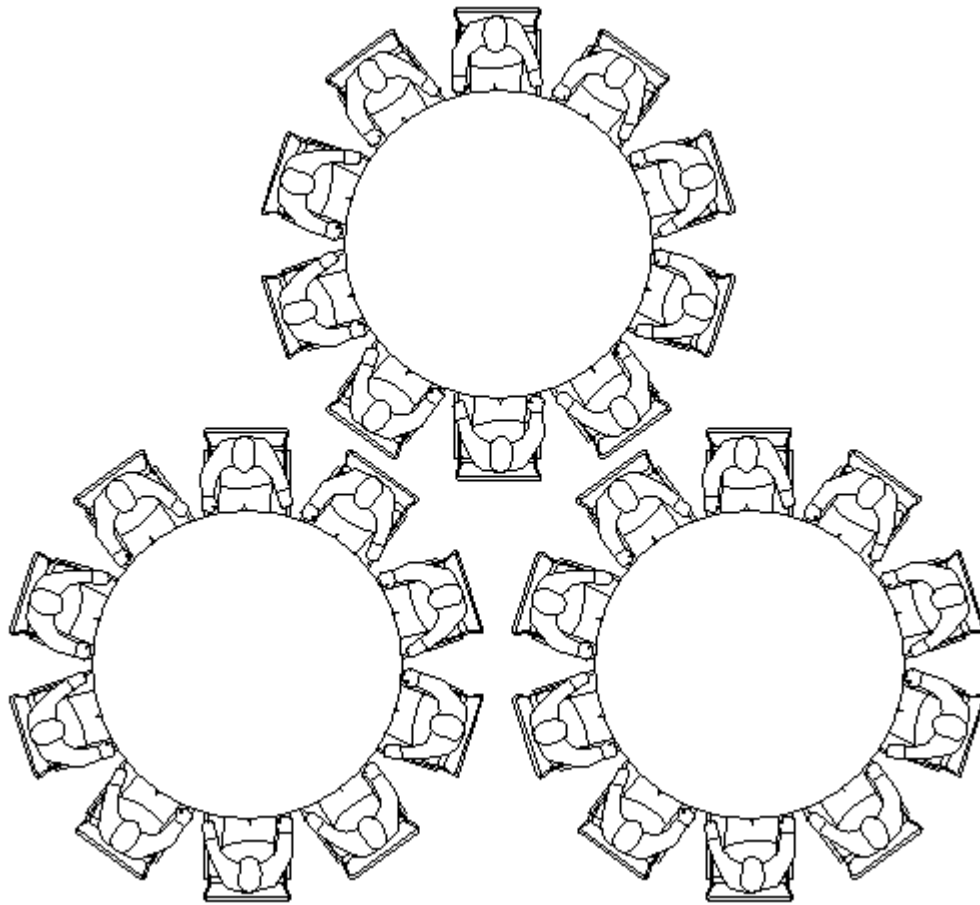
### Positives:

- ✓ Audience interaction fully enhanced, with audience members all facing each other

### Negatives:

- ✓ The audience is closed in, needing to push past other audience members to enter/exit the seating area.

It is popular for **awards night, Christmas parties, weddings** and other informal events.



## 9. Cabaret

This style is similar to Banquet style, however there is an open end, with the audience seated in an arc facing forwards.

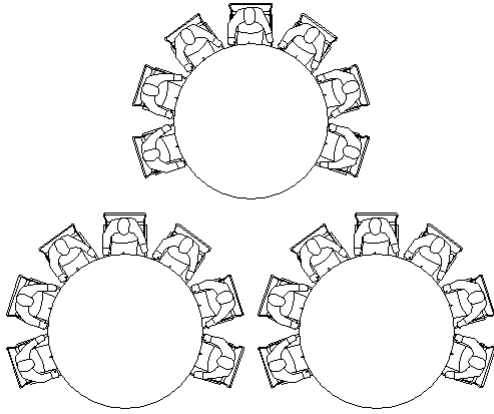
### Positives:

- ✓ The open end allows for a focal point or presentation area.

### Negatives:

- ✓ Inefficient use of floor space, with seating capacity reduced.

It is popular with **meetings** such as training sessions, **awards nights**.



## 10. Cocktail

This style is unlike any others with no chairs or tables. It is literally standing space.

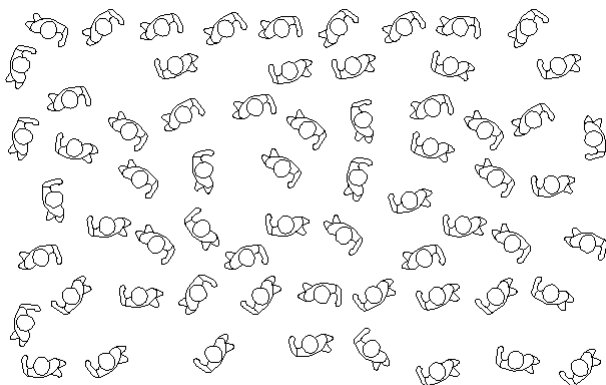
### Positives:

- ✓ Most efficient use of floor space, with maximum room capacity available.
- ✓ Audience interaction greatly enhanced, with audience members able to freely mingle and roam.

### Negatives:

- ✓ Audience is standing with no opportunity to sit and rest.
- ✓ Does not allow for note taking or consumption of plated food and beverage.

It is popular for **cocktail parties**, **weddings**, **Christmas parties** and other social events.



## ➤ Service style

Food service has a number of different styles of service. Style of service should be selected based on the type of food being served. There are various methods in which the service of the food can be done on the guest table.

### **Different service styles:**

#### **1. Silver Service/Platter to Plate/English Service**

This involves the presentation and service of food to the guest by the restaurant staff from the food platter or dish to the guest plate, with the help of a service gear. Always done from the left-hand side of the guest. Professional silver service is all about mastering the technique of using service gear held in the right hand to transfer items to the guest plate from a service dish held in the left hand.

#### **2. Pre-Plated Service/American Service**

A service of pre-plated food to the guest by the restaurant staff carried out from the right-hand side of the guest. This demands the service staff to be skilled in carrying plates without disturbing the food arranged on them. Usually involves carrying two or three plates in the left hand and no more than four plates in the right hand at a time. Usually practiced in coffee shops or restaurants serving Western cuisine.

#### **3. Family Service/French Service**

A very simple method of service in which the serving dishes are presented to the guests and placed on the dining table, allowing the guest to select and serve himself. Such service is usually found in restaurants serving Indian cuisine.

#### **4. Buffet Service**

A huge presentation of food items, hot and cold, different cuisines. The service staff positions itself behind the buffet and assists the guests by plating their food for them as they select it, using the silver service technique.

## 5. Gueridon Service

The term 'Gueridon' means a trolley used for the preparation or finishing of food. A trolley is used to cook various ingredients, involving a lot of showmanship such as flambé, carving etc. Done next to the guest table. Can either be an elaborate piece of moveable furniture or a simple dining table.

## 6. Russian Service

Food, which usually consists of a whole roast, is presented to the host, then taken back to the side station by the service staff, which is then served to the guests. Not a popular style of service.

2. Personnel needed
3. Location of events
4. Equipment needed

### ➤ Creative elements




Creative elements may include:













- ✓ Decorations that complement themed events and functions
- ✓ Food with interesting links to other event aspects
- ✓ Innovative presentation of food and beverage
- ✓ Food with interesting links with other event aspects unusual combination of food items or service ideas
- ✓ Innovative options to address particular operational limitations

## Learning Outcome 2.4 Verify the operational and service practicality of the catering proposal through consultation and analysis

### ➤ Procedures required to verify the practicality and operational of the catering proposal

The operational plan may do:

-  The verification of venue
-  The verification of personnel (staffing and contracting)
-  The verification of equipment

-  The verification of setting plan
-  The verification menu
-  The Schedule of Activity
-  The Special requirements for Guest
-  The entertainment and decoration
-  The Verification of recycling and correct and environmentally sound disposal practices for kitchen waste and hazardous substances
-  The verification of risk management issues
-  The verification of security arrangements
-  The verification of storage of food and beverage (storage facilities)
-  The verification of transport requirements and timelines
-  The Verification of venue size and availability
-  Etc

## LEARNING UNIT 3: Prepare and implement operational plan for the catering of an event or function

### Learning Outcome 3.1: Prepare operational plan or the provision of catering and ancillary products and services, identifying steps, activities and sequence

#### ➤ Procedure for operational event plan:

#### 1. Develop a vision for your event/ Develop Event Objectives

The first step of event planning is to establish specific objectives (e.g., why are you organizing this event and what do you hope to achieve?). When you set your initial event objectives, you should also consider how you will evaluate the event to determine your success. Plan to hold a post-event meeting with the team who planned the event and solicit feedback from guests if possible. Evaluate what worked and what did not, review the budget, assess whether objective(s) was achieved, and identify best practices to help you plan future events.

#### 2. Put your team together/ Organize a Team

No matter the size, a special event takes a concerted team effort to handle all of the details. Where possible, the Trustee(s) involved with the school and/or activity should be invited to participate on the planning committee. Depending on the type and scope of your event, you may consider identifying an Event Manager or Event Chair as well as individual Chairpersons for subcommittees, such as:

- ❖ Venue, logistics & catering management (selection, contracts, permits, insurance, etc.)
- ❖ Guest management (invitations, greeters, registration, seating arrangements, etc.)
- ❖ Speakers/presenters (selecting, confirming, logistics, management, etc.)
- ❖ Activities/entertainment
- ❖ Publicity/promotion (Web presence, events calendars, printed programs, media relations, signage, social media, etc.)
- ❖ Sponsor/partner management
- ❖ Transportation (if providing transport for guests, students, etc.)
- ❖ Volunteer management

### **3. Create an event budget/ Establish a Budget**

Identify the available budget for your event, including internal and external sources for each of the potential expenses as part of the master plan. Create a balance sheet listing expenses for all functional areas of your meeting or event, and determine which expenses will be assumed by the host, potential sponsors, and/or by the attendees (fee). If you are hosting a revenue-generating (fundraising) event, you will want to identify your break-even point (the point at which the revenue generated at the event is sufficient to cover the expenses of hosting the event). Budget items to consider:

- ❖ Staff time
- ❖ Marketing expenses (design fees, printing, postage, etc.)
- ❖ Transportation
- ❖ Venue
- ❖ Guest accommodations (if applicable)
- ❖ Food and beverage
- ❖ Entertainment and recreation
- ❖ Audiovisual equipment and production costs
- ❖ Security (guards, cameras, etc...)
- ❖ Special needs (interpreters, etc.)
- ❖ Taxes and gratuities, service charges, etc.
- ❖ Contingency fund for unanticipated, last minute expenses.

### **4. Choice your venue and date/ Determine Venue/Location and date**

When planning an event, it is important to be aware of how to create an event that is open and accessible to everyone. This can include finding a space that is safe and considerate of a wide range of abilities and considering visual, hearing, and physical accessibility to meeting areas and facilities. No facility will look the same in-person as it does on paper, nor will you be able to get a sense of service without going to the site. If time allows, plan to visit the site and take pictures to help you block out the location of key items



(catering, check-in table, seating arrangements, podium location, parking, etc.). When determining the best location for your event, and planning the budget, considering the following factors:

- ❖ Accommodation of guests – consider the size of the group, gender mix, ages of attendees, and any special needs.
- ❖ Possible venue fees.
- ❖ Convenient location based on where the majority of your guests will be traveling from. If the event involves out-of-town guests, consider travel time and cost to reach a destination, and a site near air and/or ground transportation.
- ❖ Consider weather, especially if considering an outdoor venue.
- ❖ Security (needed? If so, how much and for how long?)
- ❖ Parking availability (including designated parking for Trustees and other VIPs)
- ❖ Audio-visual needs – be aware that not all rooms are equipped with sound systems, nor do all sessions need sound. A/V support often comes at additional cost to the venue rental fee. Determine which rooms need sound and which can be used with the systems in place. Consider the following potential A/V needs:
  - ✓ Sound system
  - ✓ Projector or Screen (be sure to understand screen size – square or rectangle – in order to prepare PowerPoint presentation in appropriate 16:9 or 4:3 format)
  - ✓ Microphone (podium mic, standing mic, handheld, lavalier, etc.)
  - ✓ Internet connection (for accessing YouTube or other online content)
  - ✓ Laptop (provided by facility vs. bring your own to connect to their system)
  - ✓ DJ and/or pre- post-meeting music (also consider the playlist to ensure the appropriate tone for the event)
- ❖ Consider your potential facility needs as well:
  - ✓ Podiums
  - ✓ Stairs – such as from audience up to stage

- ✓ Dance Floor
- ✓ Generators – may have additional cost for gas depending on length of use 5
- ✓ Spider boxes (power)
- ✓ Extension cords
- ✓ Curtains o Easels
- ✓ Flags (U.S., State, etc.)
- ✓ Etc.

❖ There are many meeting room configurations to consider as well:

### 1. **Theater**

Appropriate for large events and lectures that do not require extensive note taking. This is a convenient setup to use before breaking into discussion or role-playing groups because chairs can be moved.

### 2. **Classroom**

The most desirable setup for medium to large-size lectures. This configuration requires a relatively large room. Tables provide attendees with space for spreading out materials and taking notes.

### 3. **U-shape, E-shape, and T-shape**

Appropriate for groups of fewer than 40 people. These are best for interaction with a leader seated at the head of the setup. Audio-visual equipment is usually set up at the open end of the seating.

### 4. **Conference and Hollow Square**

Appropriate for interactive discussions and note-taking sessions for fewer than 25 people.

### 5. **Banquet Ovals and Rounds:**

Generally used for meals and sessions involving small group discussions. A five-foot-round table seats eight people comfortably. A six-foot-round table seats 10 people comfortably.

## **6. Identify and engage event partners and sponsors**

Consider whether there are organizations that you could partner with or call on for sponsorships to defray the costs and increase potential participation. When you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success. You may want to consider:

- ❖ Seeking corporate sponsors to fund a portion of the event. This can range from large to small local businesses that might be able to provide goods or services, such as catering, flowers for the tables, raffle prizes, etc.
- ❖ Partnering with community organizations that might be able to offer a venue and/or assistance with organizing or staffing an event.
- ❖ Soliciting donations/sponsorships from key individuals involved with the event. Once partners/sponsors are identified, you will need to ensure they receive recognition as appropriate in event materials and at the event. Think about how you can give them value in return for their donation.
- ❖ Plan Meals and refreshments to fit with the theme and nature of your event, where possible.
- ❖ At events offering food and beverage service, allow enough time for guests to eat leisurely, network, or socialize with colleagues or friends and family, and enjoy all presentations or ceremonies, if there are any involved. Consider starting food service one-hour prior to the start of the event, and advertise the “doors open” time.
- ❖ Generally, allow 30 to 40 minutes for breakfast, 45 to 60 minutes for lunch, and 20 minutes per course for dinner. For refreshment breaks, allow a minimum of 15 minutes for up to 100 people, 30 minutes for up to 1,000 people and 30 to 45 minutes for groups larger than 1,000.
- ❖ Ensure an adequate supply of water for guests, even if no other refreshments will be served.
- ❖ Plan on two cups of coffee or tea per person for a morning break and one cup of coffee/tea or one soda per person during an afternoon break.
- ❖ Consider a buffet set-up for informal events. Buffets offer variety and faster service.
- ❖ Consider food items for guests with special needs (e.g., gluten-free options).
- ❖ Consider donating leftover food to homeless shelters or distribution organizations for the needy.

❖ Create a Communications Plan. Event promotion may include:

✚ Invitations

✚ Web site story

✚ Newsletters /e-newsletter

✚ Email announcement(s)

✚ Flyers/posters

✚ Direct mail

✚ Social media (Facebook, Twitter, LinkedIn, Instagram, YouTube, Flickr, etc.)

✚ Registering on a variety of online calendars. When advertising events, help participants feel welcome.

❖ Ensure the readers or visitors to your Web site viewing post-event materials have an opportunity to:

- ✓ Learn more about the event – especially if it is an annual affair
- ✓ Contribute funds
- ✓ Receive information about upcoming events and/or volunteer opportunities
- ✓ Create materials for the media as appropriate, including select photos, and a press release detailing the outcome(s) of the event. You should highlight Trustees, leaders, and other VIPs in attendance. People love to see themselves in photos, so be sure to offer captions and identify event attendees or award winners, etc. Remember to get permission to use photos and identify those in them. You may also consider ordering prints of select shots to include in VIP thank you notes.

✚ Post-event publicity opportunities will depend on the nature of your event, but here are a few examples of some basic post-event publicity activities:

- ✓ Include post-event stories and photos in Web page(s), Newsletters, Blog posts o Etc.
- ✓ Post videos and/or speaker presentation on your Web site and/or social media. Be sure to receive permission from speakers to post their presentations online.

## ❖ Fundraising Events:

- ✓ Update your event page to include information on the event's success (did you reach your goal? how much did you raise?) and photos of the event. Be sure to offer opportunities for additional donations – e.g., a link to your fundraising page, etc.
- ✓ Create a news release announcing how much you raised at the event. Remind the reader about the objective for the fundraising event (e.g., if you are raising funds for a specific project – offer the details on what this project will achieve) - don't assume they remember the details from your event press release, so include key points about why you had the event and what you'll do with the funds raised.
- ✓ Consider hosting a post-event announcement event to announce the total funds raised, present an oversized check, etc.

7. Develop your event branding

8. Develop and deploy your event marketing campaign

9. Determine your tech needs

10. Identify and hire other vendors

This category could include a caterer, bartender, decorator, florist, photographer, entertainer or videographer, among others.

11. Final preparations/ Event Planning Timeline

### **High-Level Planning: Four-Six Months Ahead of Event**

- i) Establish event objectives
- ii) Recruit event committee, solicit Trustee representative, select event manager or chair, and establish sub-committee chairs
- iii) Select date
- iv) Identify venue and negotiate details
- v) Develop event master plan and set theme for the event

- vi) Get cost estimates (e.g., room rental, food & beverage, equipment, speaker fees, travel, etc.) and create a budget
- vii) Create communications plan (ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design and printing coordination, online /social media, etc.)
- viii) Identify and confirm speakers/presenters/entertainers
- ix) Determine sponsorship levels/amounts
- x) Identify and contact potential sponsors/partners Three-Four Months Ahead of Event
- xi) Determine VIPs
- xii) Speaker/Presenter Liaison:
  - ✓ Finalize presentation/speech topics
  - ✓ Request bio information, photo
  - ✓ Make travel and accommodation arrangements
  - ✓ Have Legal review contracts, obtain signatures as appropriate, etc.
- xiii) Venue/Logistics:
  - ✓ Investigate need for any special permits, licenses, insurance, etc.
  - ✓ Determine and arrange all details regarding menu, A/V equipment, facilities, parking, signage, etc.
  - ✓ Review security needs/plan for the event with venue manager
- xiv) Communications Plan:
  - ✓ Request logos from corporate sponsors for online and printed materials
  - ✓ Develop draft program
  - ✓ Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
  - ✓ Work with Communications team on publicity
  - ✓ Develop and produce invitations, programs, posters, tickets, etc.

- ✓ Develop media list and prepare media alert/release, backgrounder, and media kit materials (e.g., speaker info, photos, etc.)
- ✓ Create event page
- ✓ Create social media accounts/pages as needed
- ✓ Consider developing a promotional video for YouTube and Facebook page

### **Two Months Prior to Event**

- i) Send reminders to contact list regarding registration/participation
- ii) Confirm travel/accommodation details
- iii) Request copy of speeches and/or presentations
- iv) Sponsorship: Follow up to confirm sponsorships and underwriting
- v) Publicity: Release press announcements about keynote speakers, celebrities, VIPs attending, honorees, etc. Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

### **One-Two Weeks Ahead**

- i) Schedule a meeting for all committee chairs to confirm all details against Master Plan and ensure back-up plans are developed for any situation (e.g., plans for bad weather, back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
- ii) Finalize event script: Brief any/all hosts, greeters, volunteers about their event duties and timelines.
- iii) Final seating plan, VIP place cards, etc. Ensure that all Trustees that will be in attendance are included in stage seating or in front row reserved seating, as appropriate.
- iv) Make print and online copies of any speeches, videos, presentations, etc. • Determine photo and interview opportunities with Trustees, leaders, VIPs, speakers, etc. and confirm details with interviewee(s) and media.

## **One Day Ahead**

- i) Confirm media attending
- ii) Ensure all signage is in place
- iii) Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
- iv) Ensure all promotional items, gifts, plaques, trophies, etc. are on-site.

## **Event Day**

- i) Appoint someone to arrive early to attend to important event details
- ii) Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- iii) Check-in with each Committee Chair to ensure their team is on track
- iv) Bring water for speakers
- v) Bring an emergency kit (Kleenex, Band-Aids, safety pins, etc.)

## **Post-Event**

- i) Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve
- ii) Conduct a post-event meeting and thorough evaluation of objectives vs. outcomes
- iii) Gather all receipts, documentation, final attendance data, donations, etc. and update budget
- iv) Implement post-publicity plan – thank attendees for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering or making a sustaining donation.
- v) Send thank-you letters to:
  - ✓ Sponsors
  - ✓ Volunteers
  - ✓ Speakers/presenters



- ✓ Donors
- ✓ Media in yours thank-you notes, be sure to remind the recipients of the event's success and how they contributed (e.g., dollars raised, awareness - number of participants, etc.).

### ➤ **The key Elements of Operational plan for event template:**

#### **1. Event health and safety commitment**

Write a statement ensuring the health and safety of the people attending the event. Put into detail the important information on delivering health and safety information to the people, and the process of reporting and investigating incidents when these arise. You also have to comply with industry standards, and its rules and regulations, before holding the event.

#### **2. Event details/ function sheet/ Event description**

Briefly, describe what your event is all about by writing a sentence or two. Include the title of the event, its theme, venue, time and date. The description also includes the payment and releasing of tickets, an illustrated map of the venue which includes the seating arrangement, the production schedules, and the event program.

#### **3. Key contact and Responsibility**

This is a list of people who are responsible for the certain aspects of the event. List down who is responsible for the logistics, simple budget, venue reservations and other aspects related to the event. Include their email addresses and mobile phone numbers so they can be contacted easily.

#### **4. Contractor management**

Contractors are people or a company that provides specific materials in order to carry out a task. Event operations need contractors so they can have materials to be used in the event. Contractors are important for the success of any kind of event. In this part of the document, you should write down their responsibilities. These responsibilities include site inductions for all contractors.

#### **5. Inductions**

In site inductions, contractors do an event overview and inspect possible hazards in the venue. They also report the location and usability of the most important facilities such as restrooms. A big part of their responsibility also includes complying with the requires legislation and regulations. All

contractors should be listed as well. Leave no one out in the list so you would know who can provide the certain material that you need for the event.

## **6. Risk Management**

Risk management is an important factor in any event. It shows how a crisis is being handled at the time it happens. Risks should be effectively managed for the event to be successful and worth the money and time. This part of the document describes all known risks before and after the event, how they are managed when it happens, who is responsible for managing such risks, and how it is used as a daily hazard check list for future events.

## **7. Supporting operational documentations**

There are still documents that need to be included in the event operational plan. Here, the details about safety and other aspects of the event are written down. It also includes the management of the noise, volunteers, giving of first aid, alcohol, traffic and crowd management. Audiovisual elements, stages, power, lighting and waste management are also included.

### **➤ Components of an operational plan:**

1. Costing of component and total catering onsite catering management
2. Staffing and contracting
3. Roles and responsibilities
4. Logistics and transport details
5. Resources
6. Security arrangement purchasing and storage beverage, materials and equipment
7. Production and distribution of food and beverage
8. Recycling and correct environmentally sound disposal practices for kitchen waste and hazardous substances

### ➤ **Ancillary**

Ancillary product and services may include:

- ✚ Buffet showpiece
- ✚ Floral displays and decorations
- ✚ Items and merchandise including
- ✚ Chocolates, fruit, nuts, alcohol
- ✚ Hampers
- ✚ Gift items of any type
- ✚ Novelties such as balloons and toys
- ✚ On-site management of event
- ✚ Room decorations
- ✚ Staffing
- ✚ Table decorations
- ✚ Theme and décor
- ✚ Management of events
- ✚ Staffing
- ✚ Logistic

### **Learning Outcome 3.2: Incorporate risk management issues into the plan**

#### ➤ **Identification of different risks involved in catering:**

The following risks may be involved in catering. For this reason, you might be aware of them and find how you can overcome them once happened. Those risks are for example:

1. Fire
2. Power failure
3. Food poisoning
4. Terrorism
5. Theft
6. Budget deficit

## ➤ Different ways to manage risks:

What is Risk Management?

Risk management is the act of reducing or eliminating risks associated with involvement in any event. For event planners, risk can run the gamut from less serious to catastrophic:

- Equipment or power failure
- Medical emergencies
- Sponsor withdrawal
- Fires and floods
- Last-minute cancellations
- Food safety concerns
- Severe weather or natural disasters
- Financial troubles

This is by no means a comprehensive list, but you can see just a few of the risks that are inherent in hosting a special event. They can span many areas of your event including attendees, food and beverage management, infrastructure, logistics, transportation, financing, marketing and more.

The best course of action for dealing with these issues and any others that may pop up is to plan early and plan often. Let's look at setting up a plan for mitigating or lessening the severity of risks to your event.

This process of examination becomes even more important in the planning process for new events. A failure to assess the risks involved in events can be disastrous as a result of:

- ✚ Loss of reputation
- ✚ Financial loss
- ✚ Damage to facilities
- ✚ Injury to players
- ✚ Over-stressed workers
- ✚ Loss of equipment
- ✚ Over-resourcing of one objective leading to under-resourcing of other objectives

The first step in planning any new event is to conduct a feasibility study. The purpose of such a study is to identify and assess the benefits and risks of the event, and to identify what problems need to be solved in order to successfully stage the event.

The feasibility analysis should aim to identify any risks such as:

- ✚ The sufficiency of lead time (years, months, weeks) to organize the event

- ✚ The date of the event and whether it clashes with any other events that may significantly affect the success of the event
- ✚ The budget and whether the event can be run without incurring a loss
- ✚ The degree of support that can be gained from the community, government, and parent bodies.
- ✚ The sufficiency of resources such as equipment, manpower, finances and facilities
- ✚ The environmental impact and whether the event may cause a disturbance to surrounding community, and cause traffic congestion, waste, noise, and lighting spillage
- ✚ The legal considerations such as permits, landholders permission, alcohol licensing, fundraising regulations

In addition to the above, there needs also to be a thorough examination of risks to human safety as sporting events are inherently risky. It is the first and foremost duty of all event directors to implement strategies to ensure the safety and well-being of all event go-ers. This responsibility even extends to a consideration of the risks involved if parents who are spectating fail to keep control of small children. For example, small children may be injured in the spectator stands by running and jumping from aisle to aisle, step to step and seat to seat.

Risks to health and safety associated with events include:

- ✚ Surfaces that are not even, slippery, or have potholes, and which may cause participants or spectators to trip, slip and fall.
- ✚ Food hygiene
- ✚ Competitive aggression resulting in brawls, abuse, harassment
- ✚ Accidents resulting in injury are frequent in events

In short, the event organizing committee needs to be seen to have done a reasonable job in risk management for the following:

1. Train staff
2. Install equipment required
3. Monitor the events
4. Hygiene practices
5. Standby generators
6. Insurance
7. Emergency fund

## Learning Outcome 3.3: Finalize and review details with the stakeholder

### ➤ Identification of the details of the plan

#### 1. Develop event objectives

The very first step in planning your event is to establish a tangible goal and objectives. First, start by asking yourself: Why are you organizing this event, and what do you hope to achieve? If you know your organization's key goals before planning, you can ensure that every part of your event is optimized for success. Are you trying to raise awareness for a cause, or collect a predetermined amount of donations for your next project? Are you hoping to attract 50 guests, or 500?

#### 2. Organize a team

Any event takes a concerted team effort to handle all the details. Consider identifying one key Event Manager or Event Chair as well as individual Chairpersons for subcommittees, such as:

- 📌 Venue management;
- 📌 Speakers;
- 📌 Entertainment;
- 📌 Publicity;
- 📌 Sponsors;
- 📌 And volunteer management.

Assigning individual roles to team members creates a system of accountability, as well as preventing tasks from falling to the wayside. Plus, it'll allow you to delegate – but don't forget to account for committee meetings in your event plan timing!

#### 3. Establish a budget

Establishing your event's budget is one of the most important parts of planning an event. I've seen many great ideas fall by the wayside because the team who originally came up with it forgot to take their budget into consideration before beginning to plan.

### Some of the critical expenses you need to include in your budget are:

- ✓ **Venue:** This cost should encompass the rental as well as any insurance you need to purchase.
- ✓ **Food and Drink:** This field is pretty self-explanatory. However, remember that the amount you can afford here might also dictate the number of tickets you're able to sell.
- ✓ **Entertainment:** This field can be customized however you need it to be — whether it's allocated for speakers, a DJ, or even a talking pig, make sure you have wiggle room for travel and accommodation costs as well as any compensation.
- ✓ **Décor:** Will you be going with a DIY mason-jar theme, or one that's a little fancier? Establishing the costs upfront will help you determine which one you can afford.
- ✓ **Staff:** This category might often be forgotten, but it's key to account for the transportation and lodging costs of your staff, especially if you're headed out of town. Even budgeting staff time (what would they be spending time on if they weren't working on this event?) can help you decide whether that extra meeting is worth it.
- ✓ **Marketing:** Whether you decide to promote your event through Facebook or go old-school by putting flyers up all over town,
- ✓ **Software:** If you're not already paying for any kind of event management software, consider incorporating it into your event planning.
- ✓ **A/V:** From projectors to Wi-Fi to speakers, this category encompasses a wide variety of costs.
- ✓ **Miscellaneous:** Even the best-planned event will have some additional costs come up. Accounting for them in your budget will ensure you're not caught unawares.

Even if some of these items aren't fixed costs yet – for example, if you haven't yet picked a venue – it's important to keep the maximum that you can afford to spend in mind before making those decisions.

#### 4. Set a date

The date might already be pre-set for a recurring event, but if this is a new event, be sure to consider the following before firming up your date:

- ✓ Give yourself enough time! Ideally, you should have 4-6 months to plan, if not more (depending on the nature of your event)

- ✓ Be aware of statutory and religious holidays
- ✓ Avoid school holiday time periods (winter, spring and summer holidays)
- ✓ Check dates with key participants – speakers, presenters, VIP guests, etc.
- ✓ Once you've set the date (and have already outlined your budget), you can start booking any external staff (such as caterers) you need right away.

## **5. Create/establish a master plan**

Once you have a good idea of all the costs and the timeline associated with your event, it's time to start the real plan! Creating your event master plan will allow you to ensure every aspect remains on track, as well as making it easier to coordinate with volunteers and event committee members.

Your event master plan should encompass all aspects of the event, including:

- ✓ Venue, logistics, & catering management (contracts, permits, insurance, etc.)
- ✓ Speakers and presenters (identifying, confirming, logistics & management)
- ✓ Activities and entertainment
- ✓ Publicity and promotion (online & off-line, such as web page & online promotion; events calendars; printed programs; media relations; signage; social media, etc.)
- ✓ Registration (online sign-up, payment and tracking; on-site sign-in, etc.)
- ✓ Sponsor and partner management
- ✓ Volunteer management and responsibilities

While planning your event, consider also creating a detailed timeline, so that everything moves smoothly. Include when any permits or insurance policies need to be submitted, when registration ends, and a detailed timeline of the day-of.

Although it might be tempting to say, "It's all in my head! I'll be fine!" and not be concerned about writing it all down, beware: this kind of mentality will make it much more difficult for you to assign accountability.



It'll also make it more difficult to remember what you did for the next event – so do your future self a favour and keep everything written down.

Finally, if you or your organization has run previous events of a similar type, reviewing any documentation that exists at this stage can help you ensure you're not missing anything.

## 6. Book Your Venue

Once you have the date nailed down, it's key to book your venue as soon as possible. Your event has to have a date and location nailed down before you can begin advertising, so this task needs to be completed as early in the planning period as possible.


(Note that some flexibility around the date might also help you out at this stage and open up a wider variety of venues.)

Some things to consider when picking a venue for your event are:


- i. **Accessibility.** Does the venue have accessible entrances and elevators? Are there all-gender washrooms? Will you have space for interpreters? This and many other factors go into choosing a space that all participants will feel comfortable in.
- ii. **Size.** An event for 50 people will need a very different space than one for 500. Additionally, consider whether or not you'll need separate rooms for breakout sessions or the like.
- iii. **Parking.** Is there a parking lot, or is it easy to access via public transit?
- iv. **Insurance.** Will you need to purchase separate insurance? What are their liability rules?
- v. **AV.** If your event needs speakers and microphones, make sure it's easy to set them up in the space that's available. The same goes for Wi-Fi access (and cell phone connection!), or any other technological needs your event has.
- vi. **Costs.** How much of a deposit is the venue asking for? Will there be additional costs? How much will you get back if you (heaven forbid) need to cancel?

## 7. Brand your event

If you want your event to stand out, you need to choose a timely and compelling theme that sets you apart from your competition. This means that you need to come up with a dynamic overall theme and you need to take great care with the actual name since it can be a key attention-getter, especially in online media.

 **Brainstorm names:** When you are brainstorming the event name, think about:


- How is your event different from other events in your sector?
- What are you hoping to convey through this event?
- What are the main components of your event?


 **Create a tagline:** Once you've come up with a name, also try to craft a tagline – a short, memorable branding slogan that describes the event.

## **8. Identify and establish partnership & sponsors**

Are there organizations that you could partner with or call on for sponsorships to defray the costs and increase potential participation? Plus, when you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success -- the more the merrier, right?

You might want to consider:

 **Seeking corporate sponsors** to fund a portion of the event. This can range from national organizations that might want to sponsor a dinner, offer a door prize or a key silent auction item, to local businesses that might be able to provide goods or services, such as flowers for the tables, gift bag items, etc.






 **Partnering with community organizations** that might be able to offer a venue and/or assistance with organizing or staffing an event.

If you're looking for businesses to sponsor your event, keep in mind that they'll be more likely to do so if they can see the clear benefit to them. If you've had sponsors in the past who are willing to speak up on your behalf, so much the better – but if not, be prepared to craft a compelling case for support when you initially reach out.

## **9. Create a publicity plan**

Even with the most amazing speaker or entertainment line-up, you need publicity to get people in the door. Event promotion starts with the initial notice or page on your website, note in your newsletter or email to save the date, and then builds to include online and off-line publicity, media relations and on-going outreach to encourage registration.

Some components you might want to include in your plan are:

-  Web page announcement
-  Social media
-  Email blasts
-  Press and media connections
-  Printed materials

Finally, no promotional plan is complete without the post-event thank-you, sponsor acknowledgements and articles about the event's key messages or fundraising success.

#### 10. Determine administrative processes/ Day-Of Processes

Once you've prepared everything going on around the event, keeping track of the order of the event itself and planning out your program is the next step.

To ensure you're prepared for anything, prepare an agenda that will walk you through the whole day from setup to clean-up. Including every detail, no matter how small, will help you feel like you have it all under control!

#### **Here's a quick example of what something like this might look like:**

5:00: Drop off silent auction items at the venue (Diana)  
6:15: AV setup (Terry, Diana)  
7:00: Have quick volunteer coordination meeting (Terry +volunteers)  
7:30: Attendees begin arriving  
8:00: Hors d'oeuvres served  
8:30: Speaker 1 takes the stage  
8:45: Break  
9:00: Speaker 2 takes the stage  
10:00: Awards presented (Diana)  
10:30: Mingling, silent auction bidding finishes  
11:00: Start clearing tables  
11:30: Bar closes  
12:00 Event ends; all guests must leave

Identifying just who needs to do what can also ensure that there's clear accountability leading up to the event.

#### **11. Determine evaluation process**

##### **➤ Techniques required to review the details:**

- i. Purpose of your event
- ii. Target audience
- iii. Getting the word out
- iv. Overall logistics
- v. Engaging your attendees at your event
- vi. Give a way
- vii. Be prepared for tough questions and the media / public relations

#### **Learning Outcome 3.4: Provide information on operational plans to relevant personnel to ensure effective implementation**

##### **➤ Identification of information to provide relevant personnel:**

1. Key performance indicators: **Key Performance Indicators (KPIs) are the critical (key) indicators of progress toward an intended result.**
2. Employee assessment: Employee assessments are performance appraisals or reviews used to evaluate employees' performance and productivity. These tests assess personality, aptitude and skills.
3. Academic background: the previous formal training you have received in one or more areas of knowledge. So, typically that would be your degrees. If these include college degrees, you often add what your major or area of emphasis was.
4. Observation: Observation is the active acquisition of information from a primary source. In living beings, observation employs the senses

### ➤ **Effective channels of providing information:**

1. **Conversations:** it is a face-to-face conversation which is an informal discussion through spoken language and words on a particular issue among the people to exchange their views freely and fairly weighs each other.
2. **Communication / horizontal and vertical / employee to manager**

Horizontal communication is communication among people at the parallel or same level, position, rank or status people of the organization. Horizontal communication is the communication that flows laterally within the organization, involves persons at the same level of the organization. Vertical communication is the communication where information or messages flows between or among the subordinates and superiors of the organizational.

### **3. Written documents**

**Learning Outcome 3.5: Implement and monitor catering plan for the event, and required adjustments are made**

### ➤ **Implementation procedures of catering plan:**

#### **1. Planning event**

The process of **planning** and coordinating the **event** is usually referred to as **event planning** and which can include budgeting, scheduling, site selection, acquiring necessary permits, coordinating transportation and parking, arranging for speakers or entertainers, arranging decor, **event** security, catering, coordinating

### **The Top Ten Steps to Plan Any Event**

#### **a. Develop Your Event Goal and Objectives**

Planning an event is a massive undertaking. Before you get too far into it, think about why you want to host it. Are you looking to grow your customer base? Drive sales revenue? Educate customers? Recruit new employees?

**B. Organize Your Team:** find all people who will help you to conduct an event.

**C. Establish Your Budget**

Establishing an event budget is a crucial step during the planning phase, right after setting your goals and objectives. A budget is a detailed forecast of what will be happening financially at your event. It helps control your expenses and revenues, and measures the success of your meeting or event performance.

**D. Brand Your Event**

Event branding is a way for events organizations to create an image for their event that portrays what the event is, and what the reputation for the event is.

**E. Identify and Establish Partnerships & Sponsors-** find all people who can/ will fund your event.

**F. Create a Publicity Plan-** Let the public know what is going to happen.

2. **Execution of tasks** - Put planned works into actions
3. **Organizing the event**
4. **Equipment**
5. **Implementation**
6. **Controlling**
7. **Understanding legal and insurance issues**

➤ **Adjustment techniques:**

1. Registration
2. Seminar policies
3. Special case
4. Security issues

**Learning Outcome 3.6: Obtain feedback from customer and operational staff after the event in order to inform future catering activities.**

➤ **Different channels required for collecting feedback from customers and staff:**

1. **Asking for attendee feedback** - you can collect feedback by asking the participants
2. **Surveys shared via email**
3. **Push notification**- is a style of Internet-based communication where the request for a given transaction is initiated by the publisher or central server. It is contrasted with pull/get, where the request for the transmission of information is initiated by the receiver or client.
4. **Social media** -you can collect feedback from customers and staff by the of different media like whatsapp, web page etc.
5. **Appreciation form**- it is a written document used by organization to **appreciate** employees. This is done by senior leaders to recognize an employee's achievement.

➤ **Categorize the feedback**

1. Pre- event surveys
2. Mid-event surveys
3. Post – event surveys
4. According to customer needs

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