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Golf Resorts

Elevate the Experience for Top Producers to a Superior Level

Page 40

Hole No. 2,
the signature
hole at The Westin
Diplomat Resort & Spa,
Hollywood, FL.

It's So Miami

Meet Differently in This Vibrant,
Diverse Destination on the Move

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Photo courtesy of The Westin Diplomat Resort & Spa

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INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

MAY/JUNE 2013

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EDG Photo/www.Shutterstock.com

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Photo courtesy of The Resort at Pelican Hill

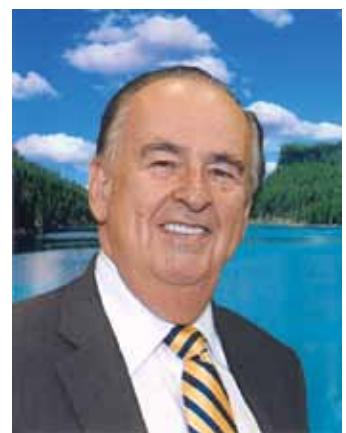
A buyout at The Resort at Pelican Hill affords groups the opportunity for a private Festa Italiana in front of their bungalows.

www.themeetingmagazines.com

Publisher's Message

Par for the Course

According to Meeting Professionals International's (MPI) 2013 April Business Barometer, the U.S. corporate sector reports more bookings as well as greater lead times. Because the costs of travel and lodging are increasing, some industry experts say we're in a seller's market, which is par for the course. As the overall business climate improves, so does the business of golf. Moreover, as the optics concerning meetings at golf resorts shifts, too,



we find many insurance and financial service companies returning to first-class golf resorts such as The Westin Diplomat Resort & Spa, Hollywood, FL, (featured on our cover) to reward their top performers and solidify relationships with customers. In our cover story, "Golf Resorts Elevate the Experience for Top Producers to a Superior Level," Larry Trainor, the recently retired president and CEO of Farmer's Union Mutual Insurance Company in Great Falls, Montana, says golf is always a significant part of their meetings for the board of directors and regional managers. In fact, Trainor's group often meets in Tucson, AZ, at

the Omni Tucson National Resort where, "they are always so easy to work with, and they really understand what our needs are." And Becky Sankey, senior corporate event planner for Securities America Inc., located in Nebraska, reveals her company "wouldn't select a resort without a golf course on property" because it's the No. 1 amenity that her attendees request.

After all is said and done, here's one more reason events at golf resorts are popular: Top performers, fierce competitors all, want to meet at golf resorts to fulfill their dream of besting the top pros in the world on any given hole — especially one with an island green. Take, for instance, a few Sundays ago, as Tiger Woods and Sergio Garcia were tied with only a few holes left at the Players Championship at TPC Sawgrass in Ponte Vedra Beach, FL, Garcia plunked not one but two balls into the water surrounding the iconic island green of the 17th hole (see page 40) for a quadruple bogey seven as Woods, the eventual winner, watched intently from the clubhouse.

For sure, many if not most of the more than 500 attendees at the tournament hosted by PricewaterhouseCoopers, the largest of the Players Championship corporate partners, returned home to boast that they bested Sergio Garcia's score on one of the most difficult golf holes in the world.

Harvey Grotsky

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A COASTAL COMMUNICATIONS CORPORATION PUBLICATION

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Marriott Rolls Out 'Red Coat Direct' App

BETHESDA, MD — Marriott Hotels is introducing Red Coat Direct — the first branded hotel app to grant any meeting wish (within reason) from room temperature adjustments, to coffee refills or having lunch served earlier with an additional vegetarian dish. Without leaving the meeting room, meeting organizers can now adjust and edit their meeting requests and preferences with a touch of a button. Red Coat Direct is rolling out at 350 Marriott Hotel properties in the U.S. beginning in May and will be expanded to the brand's entire global portfolio of 500 hotels by the end of 2014. The app is available for all Internet-enabled devices and will be available in 19 languages by 2014. Workspace On Demand powered by Liquidspace, an application to book meetings on demand, is further differentiating the customer experience at Marriott Hotels by allowing guests to book both free and paid spaces as easily as they book a guest room. www.marriotthotels.com

Access Destination Services Announces Expansion

SAN FRANCISCO, CA — Access Destination Services, a destination management and event production company, announced that the company is expanding into the wine country of Northern California. Access Wine Country, serving Sonoma and Napa Valley, will be lead by industry veterans Mary Carvotta-Trexler and Robert Elliott. The Access Wine Country daily operations will be run by Fiona Tropiano, director of business development. A seasoned veteran with more than 20 years in the hospitality industry, including seven years previously with Access in Southern California, Tropiano brings extensive knowledge and DMC expertise to the Access Wine Country team. Christopher Lee, DMCP CEO of Access Destination Services, said, "The continued growth of Access is a result of our expanding long-term partnerships with clients, hotels and suppliers in key destinations throughout North America." www.accessdmc.com

Hard Rock Plans Beachfront Hotel in Daytona Beach

ORLANDO, FL — Hard Rock International, in collaboration with Bayshore Capital, announced plans for a Hard Rock Hotel in Daytona Beach, which is expected to debut in 2016 at the time of the 58th Annual Daytona 500. Situated on a beachfront site, plans call for 250 hotel rooms and 100 condominium units with access to all hotel amenities and a signature Hard Rock Cafe. "The city and county have been working hand-in-hand to rejuvenate the city of Daytona Beach, and we're thrilled Hard Rock and Bayshore Capital have chosen 'The World's Most Famous Beach' as its newest location for expansion," said Daytona Beach Mayor Derrick Henry. Hard Rock Hotel Daytona Beach will be the brand's fourth hotel in Florida and is currently anticipated to offer two rock star suites; Body Rock workout facility; Rock Spa; the Rock Shop; and a world-famous Hard Rock Cafe. The property will feature live music and entertainment. More than 28,000 sf of ballroom and banquet facility space are planned as well. www.hardrockhotels.com

Talbert Appointed to U.S. Travel and Tourism Advisory Board

MIAMI, FL — U.S. Deputy Secretary of Commerce Rebecca Blank announced the appointment effective

May 10, 2013, of six new members to its Travel and Tourism Advisory Board, which serves the Secretary of Commerce on matters relating to the travel and tourism industry in the United States. Greater Miami Convention & Visitor Bureau (GMCVB) President and CEO William Talbert III, CDME,

was recently appointed to the board, which also includes industry leaders from a cross-section of hotels and restaurants, transportation services, financial services, as well as a mix of small and large firms from across the country.

Travel and tourism is Miami's No. 1 industry and plays a vital role in the community's economic well-being. Record-breaking tourism growth for the last three years generated consistent increases in industry jobs. Talbert and the GMCVB team have put countless destination-wide programs into place and work closely with organizations year-round to ensure business and leisure visitors to the destination continually have improved infrastructure, services and amenities needed to keep travel and tourism growing. "I'm honored and humbled to be appointed to this board and look forward to joining my esteemed colleagues and peers in working with the U.S. Secretary of Commerce on policies and issues that impact the Travel and Tourism Industry," said Talbert. tinet.ita.doc.gov, www.miamimeetings.com



TALBERT



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1 The Incentive Research Foundation Board of Trustees pose in front of the Hard Rock Hotel Cancun in Mexico, which hosted the 2013 Incentive Research Foundation Annual Incentive Invitational May 7-11. **2** Matt Harris (center), chair of the IRF board, with representatives from the Hard Rock Cancun, host hotel for the Annual Incentive Invitational, Kevin Edmunds, Enrique Martin del Campo and Irma Yeo. **3** At Destination Marketing Association International's Destinations Showcase Chicago on May 8, Michael Gehrisch, DMAI president and CEO, welcomed Suzanne Medcalf from IMEX America, a Showcase Chicago industry partner. **4** The show floor at Destinations Showcase Chicago. **5** Seventy corporate buyers took part in the first ever Exclusively Corporate @IMEX for a day of education, networking and facilitated round tables during IMEX '13 in Frankfurt May 21-23. **6** Meet Minneapolis, Convention and Visitors Association, gathered 85 hospitality workers from hotels, restaurants, attractions and service partners and staff on May 8 for a "Be a Hospitality Hero" day. **7** New Orleans Ernest N. Morial Convention Center staff pose in front of new video display board added to the recently renovated convention center before marching in the Fourth Annual National Travel & Tourism Week Parade.

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Sydney

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Event Planning

By Stacy Fantauzzi



Spice Up Your Event With Food Trucks

Finding a new twist for an event in the insurance or financial services industry can be a challenge, especially when it seems as if you've tried everything. One proven idea that continues to gain in popularity is the use of food trucks. Incorporating these mobile eateries in your next event can create a fun, relaxed experience for attendees, while also showcasing local color and cuisine. From corporate luncheons to full-scale events, the possibilities are endless.

Benefits Galore

One of the major advantages of using food trucks is getting attendees out of the meeting rooms following hours of sessions and presentations. No matter how exciting the projections are for next year, as meeting planners, we know the importance of getting attendees to move around and engage, and a change of venue is often the answer.

For example, for an industry event recently held in downtown Los Angeles at the LA Live/Staples Center, the use of a food truck at lunch enabled attendees a chance to get out of the hotel and meeting space, while also experiencing a bit of local cuisine. Attendees were able to bask in the sun, enjoy the great weather and see the local area, while experiencing a variety of different cuisine options.

By adding a little flair, you can easily increase overall morale, attendee satisfaction and create a great environment that is conducive for attendee engagement. Further, the use of food trucks shows your guests that a lot of thought went into creating the event for them instead of the same-old buffet or plated lunch that they have come to expect. What

a great way to kick-off an incentive trip for an insurance company or a national conference with hungry travelers!

Food trucks were an integral part of the closing event for an annual employee training event for more than 500 attendees that metroConnections arranged. The evening reception represented the client's brand with color tones, logos, custom-built décor and lighting. The theme revolved around an urban outdoor experience, as the company wanted their team to freely move around the room and not be confined to banquet tables and buffets. They knew their staff had worked hard all year and wanted to treat them to a fun experience. In addition to miniature golf, cocktails around a bar built to represent a rooftop garden oasis, and a memorable photo takeaway experience, food trucks from the city were staged around the perimeter of the conference ballroom. The food trucks were chosen for the variety of cuisine they offered — from locally sourced and organic burgers, to spicy Indian dishes and savory dessert options. The choices created an environment that allowed attendees to sample or splurge on whatever they desired.

Another great benefit of food trucks is their ability to offer a variety of food options. This is especially important when planning your menu for a group with varying food allergies and preferences. Contrary to popular belief, there are many options for healthful, vegan and vegetarian cuisine, as well as the more traditional choices such as tacos, sliders and french fries. Think outside of the box — or as in this case, outside of the standard menu.

Also, most food trucks can provide a menu for all hours



of the day — breakfast, lunch or dinner. For instance, at a recent event in Minneapolis, food trucks were used inside the venue during the evening cocktail reception. This unique approach created an interactive element to the event.

However, If there are restrictions to using food trucks indoors, or there isn't enough space, placing the trucks just outside the venue can be a great way to expand the space, include outdoor elements and increase venue capacity for guests.

Getting Started

Despite their appeal, many planners get stuck as they attempt to figure out how to integrate a food truck into their event. Start the process by answering these questions:

1. Identify the type of food the truck will feature: breakfast, lunch or a dessert?
2. How and when will the trucks be used? For an afternoon conference break, a fun midday corporate lunch, or as the showpiece of the event?
3. Where will the trucks will be used? Inside or outside? Public space or private property?

Once the initial questions are answered, the next step is to coordinate the details. Be sure to work with an experienced event management team or planner who not only understands the logistics of the actual truck — cooking equipment, space requirements and power — but also the coordination of permits, venue/hotel regulations, city ordinances and contracts. Understanding how to navigate these details is key to the success of your event.

For example, some conference centers or venues may have restrictions or additional fees related to bringing in outside catering companies (either they provide catering



themselves, or there is liability in bringing in outside food vendors due to food safety, etc.) Furthermore, venues might not allow propane tanks or other equipment such as fryers indoors that might be considered a fire hazard. In such cases, food trucks would have to be located outside.

The venue should be able to help you as the meeting planner understand other safety regulations that need to be

By adding a little flair, you can easily increase overall morale, attendee satisfaction and create a great environment that is conducive for attendee engagement.

followed including any city or other jurisdictional ordinances such as where vendors can park on roads or open spaces. Knowing these regulations and permit requirements is essential in pulling off the food truck flair to an event. All of these items should be considered before signing a contract.

While it requires some prep work, food trucks are the perfect addition to an upbeat event for our industry. The accessibility, theme and uniqueness of each type of food truck adds pizzazz and most important, will create a lasting and memorable impression on your attendees.

I&FMM

Stacy Fantauzzi is an account manager, event services with metroConnections since June 2007. Fantauzzi has unique expertise in designing and executing complete event concepts including décor and onsite management of vendors and suppliers. A member of Minnesota Meeting Professionals International, she serves on the Education Committee and has held other responsibilities for the organization. Since 1984, metroConnections has provided complete conference, event, stage production and transportation services for meeting and event planners nationwide. Contact metroConnections at 612-333-8687 or visit www.metroconnections.com.

The elegant Mar Vista Ballroom at The Resort at Pelican Hill in Newport Beach, CA. Pelican Hill offers a variety of buyout options.

All to Ourselves

The Benefits of Buyouts and How to Negotiate the Best Deal

By
Karen Brost

Even though your mother always taught you that it's nice to share, sometimes you just don't want to, especially when the situation involves a meeting that requires a high degree of privacy or exclusivity. In that case, a hotel or resort buyout just might fit the bill.

Tom Wilson, division vice president and financial services sector lead for Maritz Travel, described some of the advantages. "We recently did a buyout for a financial services client. The client wanted to create an intimate atmosphere for their event, and the hotel was the perfect size for their group. With the buyout, the client also liked that they wouldn't have to share function space with any other groups and that there would be 100 percent focus on their guests."

He says the three main factors to consider for a buyout include timing, budget and hotel size. "Hotel size is

particularly important because you want to be sure it creates an intimate setting for the guests. The perfect property allows clients to create the exceptional experiences they desire. Also, consider all of the areas that can be customized for your event. Is that important for your guests and the business objectives you are trying to achieve? If so, a buyout might be a really great option.

Creating a Customized Experience

"I would say the biggest advantage is the increased leverage with the hotel — the client can really make the property their own," Wilson continues. "That leverage gives clients the ability to customize the service experience for their guests. Things like housekeeping times and other staffing throughout the hotel can be customized based on a client's preferences.

Additional benefits worth noting include full access to the resort's amenities, customization of resort amenities, and the ability to create a 'home away from home' experience for guests."

Frank Ashmore, director of sales and marketing for The Resort at Pelican Hill in Newport Beach, CA, describes some of the buyout options his property offers. The Italian-themed five-diamond resort, which offers expansive views of the Pacific Ocean, features 204 bungalows and 128 luxury villas along with two Tom Fazio-designed golf courses and The Spa at Pelican Hill.

"We have different types of buyout options based on the size of the group," he notes. "I classify them into two distinct categories: a bungalow buyout or a villa buyout. For a villa buyout, the group would decide what enclave of the villas they prefer to have, whether it's the three- and four-bedroom villas in the south area or the north where

the two-bedrooms are, and then they can transform that space into their own private village." He explained that the villa portion of the resort has its own front desk, private concierge, restaurant and pool. "The group can put their own registrants there to register their attendees. They can really make them feel like they're coming into a private space." He added that other personal touches also can be done, such as adding the company's logo or theme to the key cards. "It works out really well. Those types of groups tend to be more incentive and culinary-driven.

"The bungalow groups tend to be a little larger — groups that could have upwards of 200 rooms on the peak night or maybe a few more and really want to use the whole facility of the hotel," Ashmore continues. The Pelican Hill bungalows are organized into four separate streets (vias), and groups reserving an entire street can even plan to have their own private Festa Italiana (street festival) right in front of their bungalows.

Ashmore described one buyout the resort recently did for a large financial company that was entertaining top clients from around the world. "They didn't need to use all 332 rooms, but they bought them all just to make sure nobody else would be in the hotel when they were here. They did some really unique things. They basically built a dining room out on the event lawn so that they could have a covered space for their attendees in the open air facing the ocean. They knew exactly what they wanted it to be." He added that for its general sessions, the group brought in custom-designed residential furniture to create a comfortable and sophisticated setting. "A lot of their attendees flew in on private jets," he notes. "John Wayne airport is just 15 minutes away, so there were a lot of pluses.

"We also give groups the opportunity to have an exclusive buyout opportunity from an industry perspective," he adds. "If we have, let's say, an automotive company that wants to do business with us, and they want us to

ensure that there won't be any other auto company there, we'll write something into their agreement that will allow them to have first right of refusal. We'll offer them the opportunity to buy the exclusivity, which has been very popular for us."

The M Resort Spa Casino Las Vegas located in Henderson, NV, contains 390 accommodations, including 39 suites. Drew Varga, vice president of sales for the resort, describes two buyout opportunities the property offers so groups can "come in and own the M." One option is to buy out all of the resort's rooms, suites and meeting space, which is something that can be negotiated any time of the year. The second option, which is based on seasonality and a weekday meeting pattern, allows groups to book 150 rooms or more yet still secure all of the resort's 60,000+ sf

He adds that because the resort owns its dining outlets, it's easier to negotiate restaurant buyouts, and they've even had a buyout of the resort's 110,000-sf pool deck for a private corporate party for 8,000 guests.

Negotiating a Buyout

Not surprisingly, negotiating a hotel buyout can be more complex than negotiating other meeting contracts. Tim Brown, chief executive officer of Meeting Sites Resource in Irvine, CA, has negotiated many buyouts. "There are many variables to deal with, for sure," he notes.

"We've had many requests for buyouts, but often it's not feasible," he explains. "I'd say we pull the trigger on about 40 percent of them." He says the reason is that since hotel occupancy rates and revenue per available room



"Since we've left the recession, the (hotel's) director of revenue management is firmly in the driver's seat and obviously is controlling cost factors for a buyout."

Tim Brown, Chief Executive Officer
Meeting Sites Resource, Irvine, CA

of meeting space. "Most hotels won't commit all of their meeting space to a group unless they take a full complement of guest rooms," he notes. "Group business is so important to this hotel that we will commit."

Varga mentioned a unique branding opportunity using slot machines: "We can add a message that will scroll along with the advertisements of our own in-house amenities. If someone is at the slot machine after the evening function, they'll see 'XYZ corporation: The future is ours' or whatever their message is."

The M Resort will even arrange for a private slot tournament or poker tournament as part of a buyout. Varga says that one time, they even reserved a section of the casino for a few hours one afternoon for a group that wanted to have a teambuilding activity.

(RevPar) have now greatly increased, hotels are in a much better bargaining position. "They can stick with their current model, reserving 60–70 percent for group and 30 percent toward that higher rated individual social business. Since we've left the recession, the director of revenue management is firmly in the driver's seat and obviously is controlling cost factors for a buyout."

Brown describes the factors he takes into account when negotiating a buyout for a client. "I would first look at the flexibility this group has for dates and their peak night pattern, because every hotel, big, small and in-between, resort or no, is pattern-selling for all market segments. So basically, using Orange County or San Diego for an example, they're going to get very busy with occupancy Friday and



With a total of 68 guest rooms, the historic Brazilian Court Hotel in Palm Beach, FL, can easily become a private enclave for groups.

Saturday night and probably take a bigger chunk of their total inventory for that social guest paying more and probably spending more on property with golf and spa and food and everything else." He says that in that case, the group would have a better chance of negotiating a buyout if they were willing to look at a Sunday-to-Thursday pattern and be flexible about the dates.

no groups in house because you want that exclusivity and they can get some business at the higher rate, that might seal the deal. It might give you rate flexibility, too, because the hotel can now balance out their contributions by market in high season and in a strong demand period."

He gave an example. "Let's just say the revenue manager says, 'On the

Photo courtesy of Brazilian Court

ference. "We have several groups that are looking at the same hotel for high season, say in Scottsdale, and a shoulder season in October-November, and the amount of negotiations clout we have for October-November versus January to April is rather huge," Brown explains. "It also affects our contract language. We'll have a difficult time getting a lot of extra performance clause flexibility in high season where we get just about what we want or meet them in the middle in the shoulder season."

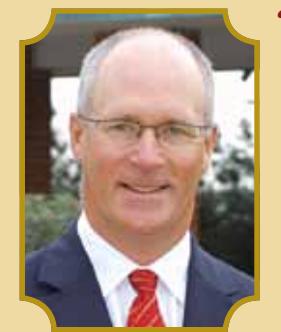
Location, Location, Location

The location of the property is also a factor. "Downtown hotels offer a little different challenge only because they are going to rely on a lot of transient business," Brown explains. "In fact, right now we've had a big, big spike in meetings in 2011 and 2012. Obviously, that's not sustainable. There's still a huge demand for groups, but the transient demand is absolutely on fire and the hotel revenue managers are allocating more and more rooms to that tran-

Revenue Categories

"Then I would really take the RFP for that particular event, even if it's incentive just mostly with leisure and fun, and I would really start breaking down the revenue contribution by category." Brown explains that he would look at the room block first since it's the hotel's biggest profit center, and then the F&B contribution maximized over the entire stay. "I'd also be looking at ancillary spend if we had proposed spa, golf and other onsite things that aren't as profitable but important to the overall mix."

"Often, we've had cases, quite frankly, where hotels come in with the rate the customer can live with sleeping-room wise, but the F&B demand was so high it was really not feasible. If they felt that the rate was going to be too high, I would encourage the customer to give some rooms back, just for transient, not group business. Let's say we have a situation with a 500-room hotel. If you can give the hotel 80 rooms back and have it guaranteed there will be



"Another advantage (of a buyout) is that the client can enhance guests' experiences by importing their company's branding and culture into the entire property."

Tom Wilson, Division Vice President and Financial Services Sector Lead, Maritz Travel, Fenton, MO

group side, I need a \$229.87 per night sleeping room contribution.' Well there are going to be some groups in there at \$199, some at \$246 and anywhere in-between. When it's all said and done, that's the dollar this guy's got to get. If you come in with a low-ball approach and keep squeezing and squeezing, you're not going to get it done. There's no need for them to do that when it's a seller's market and they can get those five to seven groups in at a much higher average daily rate."

The Rundown on Restaurants

Brown says that buyouts don't have to include the hotel's dining outlets. "I've had companies do a buyout because they didn't want anybody else (in the hotel) except for somebody coming in for a meal," he explains. He says it's difficult for a hotel to sell out all of their restaurants because they don't want to upset their regular, loyal customers. "I don't think that's a fair request. I bet

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Buyout-Friendly

Here are a few examples of hotels and resorts offering buyout opportunities.

The Brazilian Court Hotel, Palm Beach, FL, 68 units; 2,750 sf of flexible meeting space; 1,100 sf of outdoor function space.

The Resort at Pelican Hill, Newport Beach, CA, 332 accommodations; 20,000 sf of indoor-outdoor meeting space.

Ponte Vedra Inn & Club, Ponte Vedra Beach, FL, 66 guest rooms at The Lodge and 250 guest rooms at The Inn; 25,000 sf meeting space.

Enchantment Resort, Sedona, AZ, 218 guest rooms; 13,000 sf of indoor space; 20,000 sf outdoor event space.

Montelucia Resort & Spa, Scottsdale, AZ, 293 accommodations; 27,000 sf of indoor space; 70,000 sf of outdoor function space.

M Resort Spa Casino, Las Vegas, NV, 390 guest rooms and suites; 92,000 sf of meeting and function space.

Hyatt Regency Atlanta offers buyouts of its Regency Club Level. Located on the 22nd floor of the hotel's Atrium Tower, the Regency Club level contains 33 rooms, including three King Crown Suites, 22 king rooms and eight double rooms. The buyout includes access to the lounge and complimentary snacks throughout the day.

I've never had any language in a contract in all of the buyouts we done over many, many years that have a clause saying they couldn't operate their restaurants. The other side of the coin is that we might buy out a couple of their restaurants for our dine-around."

Privacy and Confidentiality

Buyouts also offer groups a level of privacy and confidentiality they can't achieve when there are other groups in-house. "Sometimes, the reason for a buyout is to keep the meeting 'under the radar,'" notes Ian Black, director of group sales for The Brazilian Court Hotel, a historic Palm Beach, FL, property that dates back to 1926. "One of the philosophies of our property is to treat everybody as a VIP, acknowledge them for who they are, and then leave them alone to go about their business. With only 68 units available at any given time, it makes buyout opportunities fairly easy. As a matter of fact, 25–30 rooms will make a client the premier group in house, and 40+ rooms will practically ensure a client to be the only group in house."

Brown says that another reason some companies like to do buyouts is the concept of "not having anyone infiltrate their castle." He notes, "When there's a lot of proprietary information

being passed around through a lot of different mediums, they are mindful about their intellectual capital, if you will, and how that's protected. If there are no other groups in-house, they kind of control more of what's going on. This applies, quite frankly, even more to the financial and insurance industries who have more information sitting out there in a volatile market and competitive marketplace.

"That happens quite a bit," he continues. "We've had some companies on the big corporate level that have even had language in their contracts that when the general session is going on, they don't want any employees in the room. They just basically want the room refreshed at specific times when the meeting is on break. They are really particular about their intellectual capital and streaming out information and how they do that."

These companies prefer the exclusivity of a buyout for good reason. "Clearly, if you take a typical resort in high season, there could be three to seven groups overlapping at the same hotel," Brown notes. "For some of our customers, we list the names of some of the companies that cannot be onsite over those days, but who knows about the CEO of the competitor attending someone else's meeting? Or if he's one

of the social guests and he's looking at the reader board. Or not even the CEO, but some enterprising marketing guy is on-property and he wants to get some scoop on what brand 'X' is doing. I guarantee if he walks in to have dinner and he sees that name on the reader board, his antennas are up and he's like a hound looking for the rabbit."

Promotional Power

Depending on the guidelines of the hotel, a buyout can give a group more leeway in terms of promotional opportunities. "Another advantage (of a buyout) is that the client can enhance guests' experiences by importing their company's branding and culture into the entire property. This includes items like signage and décor," Wilson notes. "We put this in the contract," Brown says. "(For example), we can put a giant carpet where they walk into the hotel with our message on it and logo."

The bottom line is that there are many advantages to being the big dog (or maybe even the only dog) on campus for a meeting. The key to success is to negotiate the right deal, and Brown offers some sound advice. "Think like a revenue manager and be mindful of the total art of the deal in terms of the win-win that will allow you to achieve all of your goals."

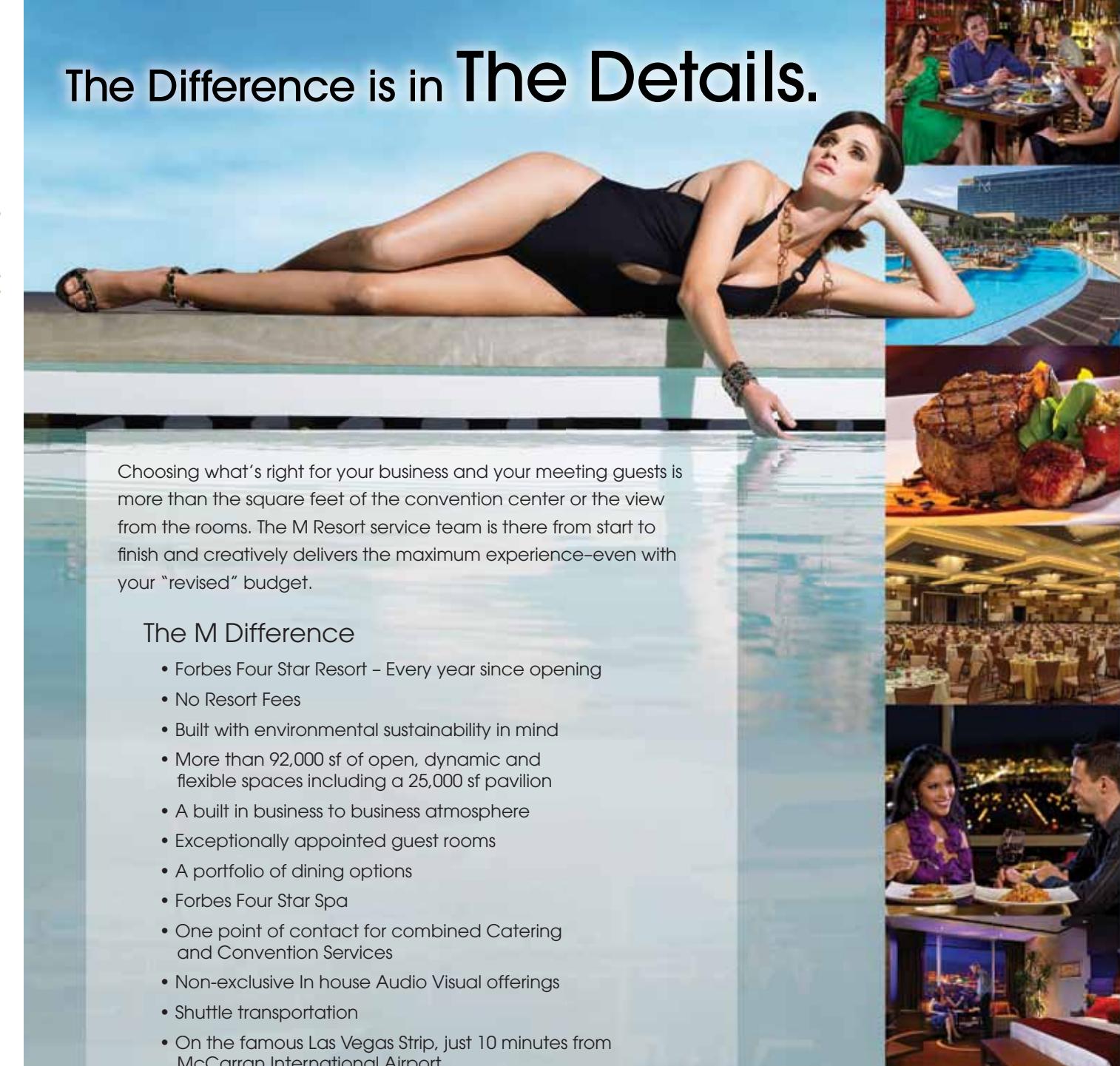
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Green Meeting ROI

Putting Your Meetings on the Road to Cost-Effective Sustainability

By Timothy Herrick

Environmental awareness has evolved from a well-intentioned notion to public and private policies and standards. However, before insurance and financial meetings professionals can even think about incorporating sustainability practices into their events, they must be prepared to measure and prove a return on the "green" investment.

In February of 2012, green meetings became formally institutionalized when the Convention Industry Council (CIC) issued its APEX/ASTM Environmentally Sustainable Meeting Standards. Long anticipated,

the program was initiated in 2008 and included input from the Green Meetings Industry Council (GMIC), the United States Environmental Protection Agency and a reported 300 planners, as well as suppliers,

facilities and environmentalists. The standards address nine key segments: Audio-Visual; Communication & Marketing Materials; Destinations; Exhibits; Food & Beverage; Meeting

Continued on page 35

Continued from page 18

Venue; Onsite Office; Transportation; Accommodations. The ninth and final standard on sustainable accommodations was just published in April (www.conventionindustry.org/standardspractices/apexastm).

"The APEX/ASTM standards require planners and suppliers to approach event sustainability with a holistic, end-to-end approach," says Lawrence Leonard, director, APEX Standards, CIC. "The standards encourage planners to start with a sustainability policy and sustainability goals for the event and to work methodically from there. The standards want sustainability to be integrated into the fabric of the meeting or event, not sprinkled on here or there."

The GMIC, in conjunction with iCompli, a division of BPA Worldwide, a global third-party assurance provider, has announced an APEX/ASTM certification program to further proliferate green meetings. "Certification drives adoption of industry standards," says Tamara Kennedy-Hill, CMP, executive director of the GMIC. "We saw a real need in the industry for a certification program that industry participants could achieve and be recognized for their sustainability performance."

Planner Awareness

The standards may clarify what constitutes "green," but for insurance and financial services company planners, making their meetings more sustainable can be problematic. The standards — and green meetings in general — are more immediately applicable to larger conventions, whose economies of scale and a destination's environmental policies make sustainability more easily attainable. In addition, corporate meeting planners are under more intensive Return on Investment (ROI) pressure than larger conventions, which can have a wider range of priorities.

Measuring sustainability and how it coincides with cost savings and cost benefits remains a challenge

for insurance and financial planners. According to the "2012 Economic Impact Study" conducted by Financial and Insurance Conference Planners (FICP), "although a majority of respondents reported that environmentally conscious meeting practices play a somewhat important role in their meetings or events planning, only 30 percent indicated that



Tamara Kennedy-Hill, CMP
Executive Director
Green Meetings Industry Council
Salem, OR

'Going Green' has had an impact on their meetings and events." The study estimated that on average, insurance and financial companies planned 95 events for the survey year (2011).

It is uncertain how planners defined impact — the survey covered an array of economic issues — and this was the first time the green question has been surveyed, so tracking the rate of green awareness growth is not possible.

However, when it comes to green meetings, most consider the 30 percent number as typical — and even at the high end — for planner professionals involved in green practices. Amanda Gourgue, CMP, who founded Lee, NH-based Meeting Revolution, a meeting consultant firm specializing in green meetings, says, "That is where the industry is overall, about 20–30 percent. Planners of all sized meetings are interested in green meetings, they are just unsure of how to make it happen," says Gourgue, who titles herself as Chief Meeting Revolutionist. "Planners have to be more comfortable stepping outside of the box."

CSR and ROI

For many planners, it is no longer a choice whether or not to go green. Many organizations — both in the private and public sectors of the economy — have implemented Corporate Social Responsibility (CSR) mission statements, a trend expected to accelerate. And all divisions within a company are expected to comply. In addition

to an event's ROI, its carbon footprint and other sustainability metrics are also undergoing heightened scrutiny. "Establishing priorities is the first step and many companies have taken that step, and planners have to get their events within those priorities," says Kennedy-

Hill. "The corporate culture now is including a CSR statement. Planners have to know what that policy means in terms of their events, even if those events are small in scale."

According to Gourgue, planners should find out "what motivates their organizations and what are they hoping to gain from the green meeting. More companies are aware of CSR, so if the company has a recycling program, the meeting should implement one as well."

If green is not part of a current corporate mission policy, planners should prepare for the likely occurrence it soon will be. "Most if not all of the Fortune 1000 companies have made some sort of commitment to environmentally sustainable practices," says Amy Spatrisano, principal, Meet Green. "Those practices are mirrored by the financial community. Everyone is more conscious and more cautious about green practices. If planners can show their meetings are sustainable, or that they have reduced their carbon footprint by 20

percent, upper management will realize how it enhances the reputation of the firm. Sustainability must be driven by the planner."

Cost-Effective Metrics

Although under intensive ROI pressure — especially compared to other meeting planners — insurance and financial services planners should not let that consideration impede greening an event. If implemented correctly, with an eye towards detailed measurement and attendee participation, green can be more plus than pitfall. "Typically, going green saves costs," says Jack Phillips, founder and chairman, the ROI Institute. "Using less lighting or electricity or any type of energy

consumption will enhance the ROI. If the environmental policies don't save money, then the planner has to wonder what the benefit will be."

When analyzing each event component, planners must consider both its ROI and green potential — less waste, energy conservation — while also ensuring the new option will not hinder event objectives. "A green or preferably sustainable meeting can often save an organizer money especially if well-planned," says Kennedy-Hill. "Determine a cost/benefit tracking grid and ROI time line. Planners should select low-hanging fruit solutions in your baseline year to reinvest cost savings towards other priority preferences."

One of the lowest hanging fruits is the ubiquitous bottled water. The

solution is water stations, often adding fruits and other infusions, creating homemade, flavored water. "Instead of using those ugly brown water containers, facilities now use clear urns, making the option more appealing," says Spatrisano.

Other low-hanging fruit, i.e., meeting components that can be easily modified to be more environmentally and economically friendly, include: reusable signage or energy-efficient electronic signage; marketing and educational materials made available online for mobile devices, eliminating paper.

Even for materials where online substitutes do not apply, current economic trends have made the "green" option more cost-effective. Goods made with sustainable products of

ten carried an extra — albeit nominal in most cases — cost, but now the green option is more cost-competitive. "Up until a few years ago, people wanted to use more sustainable products but it wasn't always cost-effective," says Spatrisano. "Products that have plastic content, which is petroleum-based, have increased in price. This has made the compostable products more attractive price-wise."

For transportation, Spatrisano says, "pick venues close to the airport, or where public transportation is more accessible. If you can arrange for large numbers of attendees to arrive at the same time and arrange a shuttle, that is another method. There are logistics that have to be figured out, but it is very doable, and venues will often provide suggestions and assistance."

Whatever is being done — regardless of the size of the meeting — planners should measure and track for both cost savings and greenness, even if the scope or impact of sustainable practices is minimal. An initial step, for example, might be eliminating the printed brochure by bringing it online, which is both green and cost-effective, but planners must note the green advantage and the cost of this change. "The point is to track it, so you can create a benchmark for comparison," says Kennedy-Hill. "The next event, planners can look at things like reusable lanyards, or the life cycle of signage. The sustainable equation shouldn't deter but enhance smart business practices. If you can reduce it by 10 percent one year, but the next year the same materials are reused, that reduction of consumables can save 25 percent, as an example. The size of an event will not make a difference if these metrics are tracked."

The metrics being tracked are not just how much is saved, but how

green or sustainable the event was. A meeting's carbon footprint, the amount of waste being reduced, recycled or reused (known as the three Rs of sustain-

"If planners can show... that they have reduced their carbon footprint by 20 percent, upper management will realize how it enhances the reputation of the firm."

Amy Spatrisano, CMP
Principal
Meet Green
Portland, OR



ability and lower costs for a planner's events. "The planner and management should agree on achievable, long-time goals," says Kennedy-Hill. "By beginning to track smaller items for smaller events, the specific costs and cost savings will become clearer. If planners focus on outcomes, they achieve events that are increasingly more sustainable. It means documenting and putting out to stakeholders that documentation."

Greening RFPS

Making meeting components sustainable while also enhancing their ROI may begin with the planner, but the reality is that a green meeting can truly only be as green as its setting. "If you select a property that already has strong environmental programs or preferably a third-party certification, then most of your work is done," says Kennedy-Hill. "Most hotel chains have internal programs that are part of their basic operating structure that support energy efficiency, waste management and other environmental factors. Ask if the property has a green team; they may be more willing to work on innovative solutions with you."

Often, the culture of a destination determines how green a venue tends to be. A rule of thumb may be that if the convention center is green or if the state has a green certification program in place, the smaller meeting venues will likely follow suit. "Certain geographic regions have better infrastructure to support sustainable meetings," adds Kennedy-Hill. "Most venues receive tax incentives or have other internal benefits for operating green."

"It is not as difficult as it used to be to find green meeting hotels and conference centers, but it is often dependent on the region of the nation,"

Green ROI Checklist

Sometimes, the smaller scale of the typical events organized by insurance and financial services planners can make ROI measurement a challenge, but smaller size meetings also means they are often more manageable. Here are a few green actions with measurable cost savings.

- ✓ Identify event sustainability objectives and engage internal stakeholders, attendees, vendors and venues in meeting those objectives; track sustainability performance.

- ✓ Make schedules, brochures and other printed materials available online.

- ✓ Eliminate bottled water from the event by providing water stations.



- ✓ Select venues that offer recycling/composting programs and that track waste streams.

- ✓ Select venues that are within walking distance of offsite events to eliminate the need for shuttle buses.

- ✓ Select credible carbon credit offset providers and promote the program in registration materials.

- ✓ Negotiate the sourcing of local or organic foods in the venue RFP without additional cost.

- ✓ Purchase reusable signage for the event.



"Show the venue the sustainability policy and goals for your event. ...Ask up front if the facility charges event organizers for certain sustainability activities."

Lawrence Leonard
Director, APEX Standards
Convention Industry Council
Alexandria, VA

save," says Spatrisano. "Planners have to show their events are both economically feasible and environmentally sound."

The cumulative effect results in a provable pattern of increased sustain-

agrees Spatrisano. "It may be an overall generalization, but the more south you go, the more difficult it can be to find those facilities that have recycling, energy efficiencies, water conservation practices. Up and down the West Coast, they are readily available, also on the East Coast, the Northeast, and it is growing in the Midwest. States and destinations have made a commitment. That starts a culture, and facilities — not just the convention centers but the smaller meeting venues — follow the example."

Spatrisano adds that for meetings overseas, especially in Europe, "they have green policies much more in hand; solid practices in place."

Planners have to be vigilant and detail-oriented from the start of the site selection process. "Green initiatives should be in the RFPs and part of the early stages of an event," says Spatrisano. "If the facilities don't have the practices in place, enroll your own suppliers, or work with the decision-makers, the chef, the operation managers — people not necessarily part of sales, although salespeople will make sure you connect — and they will help you make the meeting green. Even if the facility itself doesn't have those practices as a standard for all meetings, things can be done for specific meetings."

"The most important job a planner can do is ask for green practices in writing in their RFP and put that in their contract and use as a factor in the decision process," says Kennedy-Hill. "I am so often hearing from suppliers that they are doing all these green things and no one is asking. And then I hear from planners that they can't find suppliers doing green meetings."

Planners should start by asking

the venues about their sustainability initiatives," says Leonard. "Show the venue the sustainability policy and goals for your event, and ask them how you can work together to accomplish them.

"Venues can supply metrics on how green the meeting will be, and once the planner realizes they also save money, these metrics can be part of an event's ROI."



Amanda Gourgue, CMP
Chief Meeting Revolutionist
Meeting Revolution
Lee, NH

Ask up front if the facility charges event organizers for certain sustainability activities."

Not only do the new APEX/ASTM Environmentally Sustainable Meeting Standards provide guidelines for how this RFP process should unfold, but venues also can provide metrics that will show how green the meeting was. "Some venues are now showing how much waste was recycled, how much energy was saved, what the carbon footprint of the specific meeting was," says Gourgue. "Venues can supply metrics on how green the meeting will be, and once the planner realizes they also save money, these metrics can be part of an event's ROI."

Attendee Satisfaction

The most crucial factor influencing ROI determination is attendee satisfaction. Planners not only must find ways to translate specific sustainability practices into measurable figures, but make sure those practices do not upset the attendee experience. "If green becomes an irritant to attendees, if it impedes the learning or whatever the goal of the meeting, then the planner has to wonder what the benefit will be," warns Phillips.

One good basic step is to avoid un-

pleasant surprises. "Communications should begin with the website, where people register, and even with any apps included in the meeting," says Gourgue. "If something is different, you don't want to surprise attendees, especially if there is some sacrifice, or an appearance of sacrifice, required."

Attendees do not want to feel they are "being nagged" into going green, so planners, when communicating the value of the green meeting to the attendees, should showcase a range of positive attributes. "At the buffet table, you can put little signs that say this was local food, grown or produced less than 500 miles (away) and how that reduces the carbon footprint of the event," recommends Gourgue. "That way attendees also get a feeling of experiencing the local cuisine of a destination. Planners have to educate attendees about sustainability throughout the meeting, but in a way that creates a unifying feeling among the attendees."

If the practices are part of new CSR policies of the organization, that also encourages attendees to share a "green-team" ethos. "People are recycling in their offices and in their home, their children are doing it at school," says Gourgue. "It's really just bringing those same behaviors practiced at home to a meeting environment."

With attendee satisfaction questionnaires and similar surveys a necessary step in corporate meeting follow-up, planners must also include queries about a meeting's green practices as part of the communication process. "Measuring the benefit of the reputation or image, of being green is more difficult," says Phillips. "There are a lot of variables, but a positive image is important to an organization, and there is a lot of attention being given to environmental issues and CSR. If the attendees feel they are part of that by attending a meeting, that is a positive. If you can quantify the feedback from the attendees, how they feel about the green meeting, then there might be some justifiable ROI benefit."

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Golf Resorts Elevate the Experience for Top Producers to a Superior Level

By Mike Bassett

There's no question that the business of golf — along with the rest of American economy — hit the doldrums in the years following the recession.

In 2011, for example, the National Golf Foundation (NGF) reported that just 463 million rounds of golf were played in the United States, down from the 500 million played in 2005.

But things seem to be turning around. According to NGF, the number of rounds played through September of 2012 against the same period in 2011 increased by 7.4 percent, with every state experiencing an increase versus the year before. That represented, the NGF said, "the largest single-year jump since the turn of the century."

Golf resorts, particularly in select locations, seem to be thriving as well. For example, in a recent article in the *Orange County Register*, the manager

of real estate giant Irvine Co.'s golf operations in Orange County, CA, which include the two courses at The Resort at Pelican Hill, said the Orange County courses were performing "at pre-recession levels."

And there continues to be a strong association among the insurance and financial services industries, the game of golf, and those resorts that provide the facilities golfers and non-golfers alike want to visit and play on.

Planners More Confident in Their Buying Power

Danielle Hinesley Bishop, principal and founder of Durham, NC-based HB Hospitality, organizes an annual insurance and financial summit designed to foster and strengthen relationships between insurance and financial services planners and independent resorts. The

& Financial Summit began at 2010 at the award-winning Pinehurst Resort in North Carolina and specifically focused on golf resorts. While the participating resorts no longer include only golf resorts, the importance of that kind of venue to planners is demonstrated by the participation of resorts such as Florida's PGA National Resort and Spa, the legendary Greenbrier in White Sulphur Springs, WV, and this year's host, the Sea Island Resort, located in Sea Island, GA. In organizing this event over the last four years, Bishop has found that as the trauma of the financial meltdown dissipates, planners "are much more confident that their programs are going to take place, and are also more confident in their buying power."

Bishop also notes that she no longer hears discussions regarding the "AIG Effect" and the necessity of com-

Even the best professional golfers can't help but dunk a ball or two in the water surrounding the famous par-3 17th hole at TPC Sawgrass, Ponte Vedra Beach, FL, home to the PGA Tour's Players Championship.

Photo courtesy of TPC Sawgrass

pletely avoiding any hint of extravagance associated with meetings, conventions and incentives. "But, we're not in a place where we're talking about how we can hold events that are more lavish than the year before," she says. "So there is a fine line, but planners still want to pick destinations that adequately reflect the contributions that their workers and agents have made, so they can genuinely reward them." And those destinations are, by popular demand, usually going to include golf.

Golf is a top requirement for Farmer's Union Mutual Insurance Co., in Great Falls, MT, when it holds its board of directors and regional manager meetings. It has held seven of those meetings at the Omni Tucson National Resort over the years.

The 650-acre Arizona desert resort has 128 guest rooms, a 13,000-sf spa and eight meeting rooms totaling 10,500 sf of space. The resort also features two golf courses — the Catalina Course, which has hosted a number of PGA Tour events, and the Sonoran Course, a new desert-style target course designed by tour golf professional Tom Lehman.

"What I like about the Omni is the fact that you get a great atmosphere, they are always so easy to work with, and they really understand what our needs are," says Larry Trainor, the former CEO and president of Farmer's Union, who has been to all seven meetings the company has taken to Tucson over the years. "It's also convenient for those of us out of Montana because we have easy airline access to Tucson."

Trainor, who retired in January, says golf is always a significant part of Farmer's Union's meetings at the Omni Tucson National. "It has great facilities and is well maintained with a nice layout," he says. "And you can tell it's a great course based on the number of tournaments it's hosted over the years. It's a quality course."

While some smaller meetings risk getting "lost" at some resorts, that "is cer-

“Planners still want to pick destinations that adequately reflect the contributions that their workers and agents have made, so they can genuinely reward them.”

Danielle Hinesley Bishop, Principal and Founder
HB Hospitality, Durham, NC

tainly not an issue at the Omni," says Trainor. "In fact, it's quite the opposite." He points out there are several informal meeting spots around the property where attendees can gather, and that the Omni does a good job of always grouping his attendees in one general location "so that they're always running into each other."

Because Farmer's Union is based in Montana, Trainor says the company

usually schedules its meetings at the Omni in February or March, "so that we get a jump on spring. It's certainly one of our favorite destinations."

Golf also is a definite requirement for independent broker dealer Securities America Inc., of Omaha, NE, which held its annual top producer incentive conference called the "Masters Forum" at The Resort at Pelican Hill, located in Newport Beach, CA, in March 2012.

Pelican Hill offers groups 204 bungalow guest rooms and 128 villas, along with a 22-room, 23,000-sf spa. It has about 20,000 sf of indoor and outdoor space, much of which comes with panoramic views of the Pacific Ocean. It also has two Tom Fazio-designed championship golf courses, and five restaurants with ocean and golf course views.

Becky Sankey, senior corporate event planner for La Vista, NE-based Securities America Inc., says the company took its top producers to Pelican Hill because the resort "creates a category of its own" as an incentive destination.

"We have had wonderful conferences at upscale chain hotels but Pelican Hill brought our meeting to another tier," says Sankey. For one thing,

Sankey points out that as an indepen-

within 15 minutes of getting into your rental car," she says. "And then when you get there, just by walking into the lobby and gazing at the ocean, you literally sweep away any of the tension from the day. Pelican Hill is a very unique property that most people

great "equalizer" in the sense that regardless of age or sex the attendees are able to come together on the golf course. In addition, she says that her attendees really appreciated the beauty of the two courses because of



"We wouldn't select a resort without a golf course on property, since it's the No. 1 amenity asked for (by attendees). And there's only a handful of golf resorts that boast ocean views on every hole."

**Becky Sankey, Senior Corporate Event Planner
Securities America Inc., La Vista, NE**

people don't know exists. It literally takes your breath away, and I wanted that experience for our top producers."

The top producer conference included morning meetings and free time in the afternoon and some evenings. "We have discovered that our top producers prefer relaxing experiences, as opposed to rigorous scheduled activities," Sankey says, adding that most days consisted of meetings in the morning, followed up by an afternoon at the beach or on one of Pelican Hill's two golf courses.

The two Fazio courses — the Ocean North and Ocean South courses — were a prime consideration for Securities America in choosing Pelican Hill, says Sankey. "We wouldn't select a resort without a golf course on property, since it's the No. 1 amenity asked for (by attendees). And there's only a handful of golf resorts that boast ocean views on every hole."



"If you're a golfer, it's the best show you'll ever see — not only is he hitting these incredible shots, but he'll also spin stories and engage the group. Attendees will remember something like that."

**Roger Caldwell, Owner and Founder
Great Golf Events, Prairie Village, KS**

The par 71, 7,000-yard Ocean North Course has beautiful ocean views from every tee and was opened in 1993, while the par 70, 6,580-yard Ocean South Course, which opened in 1991, has several holes that run along the ocean's edge. Sankey points out that the pro shop's setup is "flawless," as well.

Sankey says that golf remains the

the ocean views and the fact that the courses were quiet and secluded.

"There aren't too many golf courses within 15 minutes of an airport that make you feel miles removed from the hustle and bustle of everyday life," Sankey says, adding that her attendees always returned from their afternoons of golf "sunburned, but refreshed."

The response from the attendees to the Pelican Hill incentive was universally positive. "We had our hospitality desk in the lobby area so we could see the expression on people's faces when they arrived," she says. "Everyone was so enthusiastic and genuinely enthralled,

PricewaterhouseCoopers (PwC) is the largest of the Players Championship corporate partners, says Rapp, and views the tournament as its "CEO Summit."

"They will bring in 500 CFOs, CEOs, and audit board chairs from all over the world," Rapp says. "It's their No. 1 client entertainment, retention, and business growth opportunity during the year."

One of the world's most famous and recognizable golf courses — TPC (Tournament Players Club) Sawgrass' Stadium Course was built in 1982 and features one of the most notorious holes in golf — the 17th hole, with

incentive programs for insurance and financial companies, it also continues to hold a central place in other events, particularly those designed to build business relationships with customers, clients and business partners.

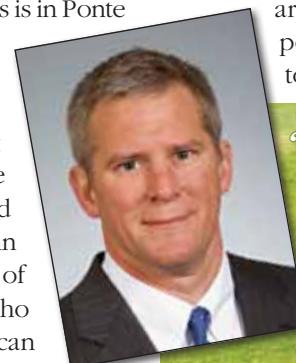
The Players Championship at TPC Sawgrass, located in Ponte Vedra Beach, FL, is, says Matt Rapp, the tournament's executive director, comparable to the Kentucky Derby or Super Bowl in the number of parties, events and functions held by the PGA Tour, as well as by corporate partners and attendees.

sense that you can put hospitality tents in places where people can actually watch golf, which isn't something you usually get at any tournament."

In addition, TPC Sawgrass is in Ponte Vedra Beach, a prime golfing destination near Jacksonville that is home to many resorts, including TPC Sawgrass' partner, the Sawgrass Marriott Resort and Spa, and the Ponte Vedra Inn & Club. "You have a lot of people who watch golf who also want to play, so you can always play golf, or go fishing or go to the beach, as well as watch the tournament," says Rapp.

ing, after the tournament has ended. Other companies might bring in their people in waves.

These corporate hospitality events are "mainly driven by the people who are important to their business — clients,



"You have a lot of people who watch golf who also want to play, so you can always play golf, or go fishing or go to the beach, as well as watch the tournament."

**Matt Rapp, Executive Director, Players Championship
TPC Sawgrass, Ponte Vedra Beach, FL**

prospects and business partners," Rapp says. Some companies also will use it as a sales incentive to reward top producers (as well as their best customers). But, in the end, Rapp says, the tournament is "a hook to get people here and to help companies grow their businesses."

course and tell them they have 40 guys and ask the course to take care of them," Caldwell says. "But there's so much more involved.

"Golf may not be boring, but sometimes it's nice to have a little variety," Caldwell points out. Too many times a golf event looks no different than any

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other — the groups just get in their golf carts and start playing.

"Why not do something that's different?" he asks. "They'll remember playing at TPC Sawgrass, but what do they remember that was unique to the event? How can you make the event within the event better?"

Caldwell says that could involve hiring an entertainer or a trick-shot artist as part of the whole golf experience. For example, he says that Dan Boever, who he calls the "best golf entertainer on the planet," can liven up any event.

Boever is a former long-drive champion who has turned into a trick-shot artist. But he's more than that, Caldwell says. "He's very funny, cordial, has a great golf swing, and never misses (any of his trick shots)." Caldwell describes one event in which Boever used a driver on a 185-yard par 3 in which he aimed 90 degrees to the left of the green and proceeded to hit high, arcing cut shots towards the pin.

"He hit the green 24 out of 25 times," Caldwell recalls. "It was the most incredible thing I've ever seen. If you're a golfer, it's the best show you'll ever see — not only is he hitting these incredible shots, but he'll also spin stories and engage the group. Attendees will remember something like that."

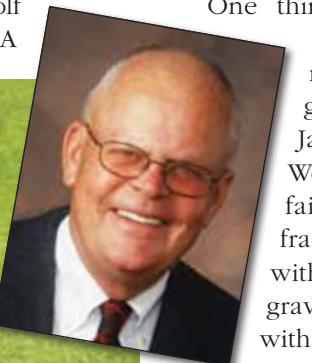


Tom M. Borba Jr., Golf Professional
Premiere Golf Solutions, Ontario, CA

hind the unit and to its left and right.

"If you have a break in a sales meeting, and you have the right kind of environment in which to bring everybody out and have a little bit of fun, this is great," he says, adding that you can create challenges and have competitions. "It's a blast. Seeing a ball whiz by or break the glass — that's exciting. And guys really do like breaking stuff."

Tom M. Borba Jr., golf professional and owner of Premier Golf Solutions in Ontario, CA



"What I like about the Omni is...that you get a great atmosphere, they are always so easy to work with, and they really understand what our needs are. It's also convenient for us because we have easy airline access to Tucson."

Larry Trainor, Retired President and CEO
Farmer's Union Mutual Insurance Co, Great Falls, MT

Planners also can use golf-related activities at meetings in which the attendees don't actually play golf. For example, Caldwell says, he'll bring in portable greens at cocktail parties, or stage a golf skills challenge during

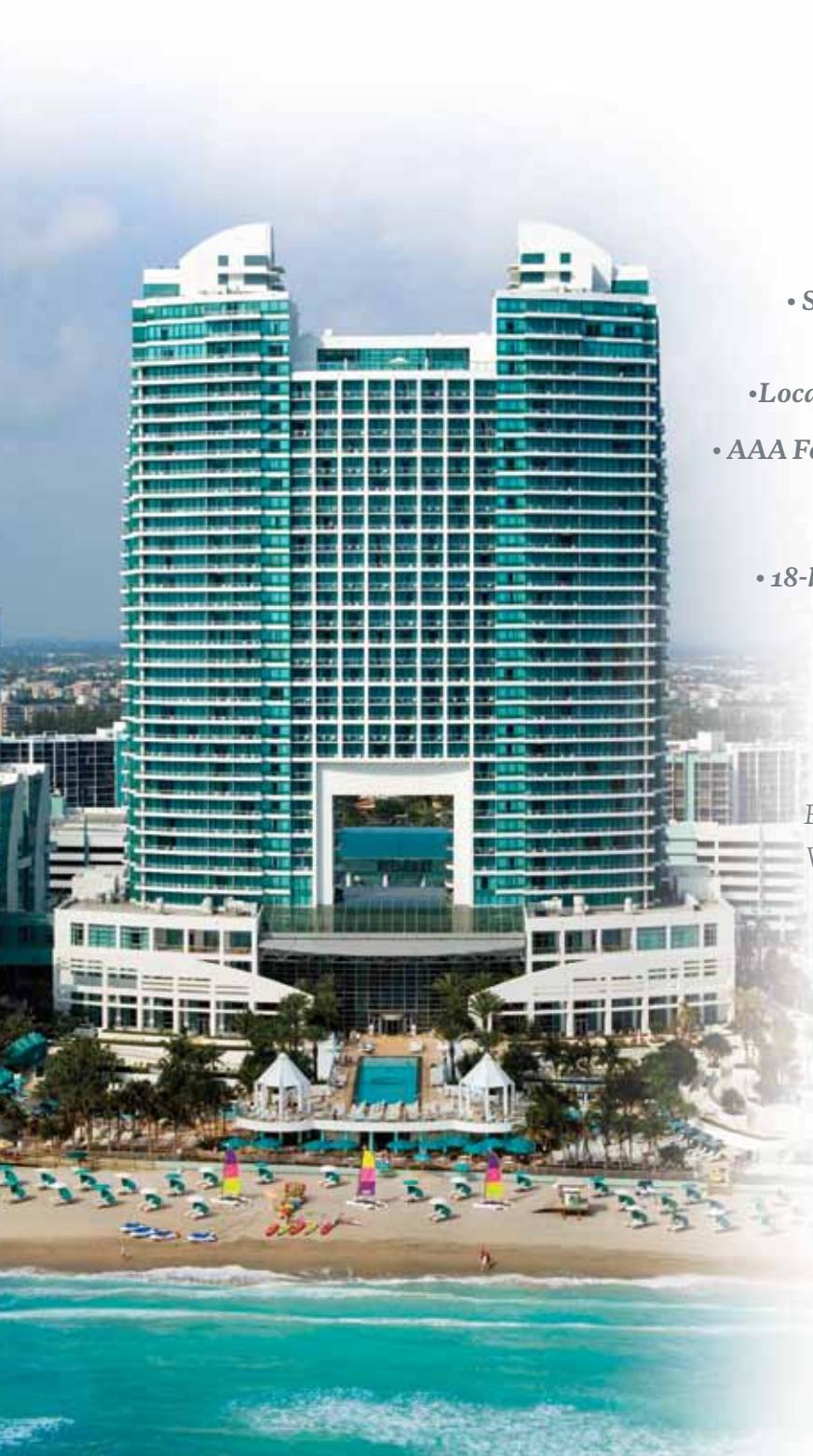
says that most of the time golf events stick to the tried and true — the typical four in a group scramble with a shotgun start, for example. What he has noticed however is that planners are becoming more aggressive in giving

spakers marketing opportunities.

"I'm seeing an effort to give sponsors more recognition and more signage," Borba says. "And I'm seeing an increase in hole sponsorships, and instead of just having your basic setup of golf carts, balls and tees, using a sponsor's logo on some of these things, like the front of the scorecard."

While giving sponsors more bang for the buck is always a good idea, Caldwell says companies should be

"I'm seeing an effort to give sponsors more recognition and more signage. I'm seeing an increase in hole sponsorships, and...using a sponsor's logo on some of these things, like the front of the scorecard."



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Crisis Management

Don't Wait Until It's Too Late to Safeguard Your Attendees and Secure Your Information

By Derek Reveron

It's the worst of all planner nightmares: A crisis suddenly strikes a meeting or event, and meeting planners and their staffs scramble furiously to figure out what to do, whom to call and how and what to communicate to attendees. A delayed and ineffective response may worsen the crisis, affect the safety and security of attendees, and create a public relations nightmare for the planner and corporate client. The underlying problem? The lack of a thorough crisis management plan. When planners have the opportunity to control the things they

Boston when tragedy struck on Patriots Day, April 15. The bombings at the Boston Marathon were a somber reminder of how vulnerable we are at any given time in any given place. Despite the dreadful events, almost all the meetings and events went on as scheduled. Why? Many of the organizations and the venues such as the Greater Boston Convention & Visitors Bureau and the Hynes Convention Center, among others, had a crisis management plan in place.

Apparently, only some attendees and speakers were thwarted from getting to Boston on time for conferences because transportation was shut down for a few days.

Vice President Of Convention Services and Sales for the Greater Boston Convention & Visitors Bureau Beth Stehley reported that Boston was back in business very quickly: "We are so proud and thankful for the resiliency of the companies that had meetings scheduled and did not cancel or postpone them."

For example, Watertown, MA-headquartered athenahealth, a provider of electronic health record, practice management and care coordination services, held its annual conference as planned. A spokesperson for the company, Amanda Guisbond, on April 25 related by email: "We're hosting our annual's User Conference today and tomorrow at the Hynes Convention Center in Boston, MA, aka Back Bay and the Boston Marathon finish line. The

area just opened up yesterday and is definitely 'back in business.' We have more than 1,300 users — mostly physicians — at our conference from all over the country."

In addition, promises of assistance came from all corners of the globe. "Since the tragic events on Marathon Monday, the Boston hospitality community has experienced an outpouring of support from around the world," says Stehley. "Many cities have reached out to us with both financial and emotional support for the victims and families, and for that we are eternally grateful."

"Over 30 international destinations sent a letter to our mayor pledging support to promote travel to Boston. This complements the offer of various third-party distribution channels to assist in promoting Boston as the place to hold their next meeting or conference," adds Stehley.

Many planners are vulnerable to such a nightmare because they lack a crisis management plan or have one that is insufficient. Bruce McIndoe, CEO of iJet International, an Annapolis, MD-based provider of risk and crisis management solutions to Fortune 500 corporations, notes that a crisis management plan "has not been top of mind among most meeting and event planners" with whom he's worked. "During venue selection and events planning, the physical, security and health risks are largely ignored. Most policies we see are around contracts and financials," he says.

McIndoe adds that crisis management planning is starting to be more

widely discussed among planners due to the violent social and political upheavals around the world such as the recent tragedy in Boston. Natural disasters such as Hurricane Sandy have also contributed to more awareness of the need for crisis planning, notes McIndoe. "There were small and large meetings that corporations had to abandon and reschedule. It forced some planners to invoke the force majeure clause. They dealt with stranded attendees. They scrambled because they had no procedures and capabilities to communicate with attendees, so they struggled through it."

In addition, security experts advise planners to adopt a crisis management plan for these reasons:

- It avoids wasting time after an incident occurs, which can make the difference between life and death.
- It can prevent a crisis from escalating.
- It can help insulate independent planning firms and corporations from lawsuits.

Indeed, decades of case law and legal precedent have established that meeting planners are among the many professionals that have a "duty of care" obligation that should meet reasonable standards, say security experts.

Good Plans Mitigate Bad Incidents

A good crisis management plan can keep a bad incident from getting worse. A detailed and effective plan helped Rocky Mountain Connections (RMC), an Aspen, CO-based DMC, respond rapidly to a potentially catastrophic incident. During a corporate group's rafting trip, a strong wind gust threw a raft into a tree. "One woman broke her neck, and another severely damaged an ear," says RMC owner Shawn Thomson-Palmero. "Because we were prepared for this type of situation, we were able to evacuate them very quickly with a vehicle. Because of the communication between us and the river guide company, the injury was taken care of quickly."

Mike May, president of Irving, TX-based Spear One, a meeting, incentive and event planning company, averted a potential information security crisis because his company has a comprehensive crisis management plan that works. According to May, a computer that May's staff used to register attendees was stolen at a meeting in a gaming destination. "It was locked and under a desk in our office. It had two levels of encryption, and the information was backed up on a secure server. But we had the financial loss of the computer and lost a business tool we needed. Fortunately, we had four other computers and enough staff. But if we had no information security and fewer computers and staff, it would have been a hardship," says May.

Bruce McIndoe
CEO
iJet International
Annapolis, MD

Unfortunately, McIndoe adds, corporate planners typically get the green light on crisis management plans only after something bad happens or a close call. "After 12 years, I can think of maybe a couple of cases where we have been brought in when that wasn't the case," McIndoe says. "Virtually 100 percent of the time, we are called in

"How do I get management's attention on this? I tell them to tell management that they need to see crisis management from the angle of preventing potential reputational risk to the company."

"We put more focus on avoiding the accidental than the sinister crisis. It's usually not somebody intentionally trying to do harm, but things like falls, health and theft."



Mike May
President
Spear One
Irving, TX

can, the best way to accomplish that is to have a bona fide crisis management plan in place before a crisis strikes.

When the Nightmare Is Real

The nightmare turned real in

only after a near-miss or an actual incident happened," says McIndoe. For example, McIndoe remembers an incident at a corporate meeting for 75 attendees in a city in Central America: "Two guys wandered off the property and ended up getting badly beaten up and their money stolen," says McIndoe. "The two men complained that they were never warned about the potential danger and wouldn't have ventured into the area had they known. We were called in after the fact because there was no process or procedure to communicate to attendees about safety and security."

Another key roadblock to crisis management planning stems from the misperception that preparing a plan is difficult, time-consuming and very costly. It does take time, says Christopher Burgess, president of Prevendra LLC, a security consultancy based in Woodinville, WA. However, he adds, a finished plan is a template

that can be adapted to all meetings large and small. "Once you go to the trouble of thinking through how you will react to given situations and have a plan, you can replicate it. Also, a plan serves as a marketing differentia-

a venue. In that last flight leg there might be 20 attendees on the same flight. The risk exposure of that flight is huge. What if the flight crashes? The likelihood of that happening is pretty low, but it has happened. Why take the risk of not being prepared when you can do a little bit of planning and be ready," says McIndoe.

Monitoring the flights of meeting participants is one of many "just-in-case" actions that planners take to guard against physical threats. Protecting personal and business information, especially online data, is also a crucial part of the job.

The Other Side of the Coin

Protecting attendee and planner personal and business information is a crucial part of crisis management. Planners who work for corporations generally have company procedures and the technology to protect online information, while many independents have less sophisticated protection, says May. However, he adds, all planners must control access to information.

Part of controlling access involves defining the informational rights and roles of staff and others associated with meetings and allowing them appropriate levels of access. "Corporations are pretty good about defining rights and roles to information, but planners with higher level privileges need to be careful to guard them," says May. "They shouldn't let junior staffers and others log in under their passwords and pull a report because they are busy."

Rocky Mountain Connections practices tight electronic security for personal information such as credit card data collected from attendees. "Our accounting department deletes all personal information," says Thomson-Palermo. "We also have an information technology company that once a week destroys personal information on our servers in all offices. We also

shred papers in our offices weekly. It's funny but planners rarely ask about our company's information security measures." More advice from experts to protect attendee and planner information includes these pointers:

- **Have two layers of encryption for online data.**

"Most meeting planners are accustomed to doing registration site and (obtaining) social security or passport (information) and credit card numbers," says May. "We all know the data needs to be stored on a secure site. But we must also encrypt the transit of the information. That is not something most meeting planners know how to do. It takes an information technology person."

- **Don't store sensitive information on spreadsheets.**

That's particularly important for financial companies, says McIndoe. "I am totally flabbergasted by how many times I see people download an unencrypted Excel meeting registration spreadsheet with social security numbers and credit card numbers on it and have it just sitting open on somebody's laptop," he says.

- **Have a procedure for handling data in a worst-case scenario.**

"Say a hurricane hits," says Burgess. "If servers are in an encrypted format, then turn them off. If the data is not encrypted and at risk of compromise, then you should have a protocol that destroys the data on the server as part of shutdown; the same kind of shutdown you would do if shipping a server."

- **Guard against "desk stalkers."**

May constantly reminds his meeting staff to "keep antennas up" for desk stalkers who hover around registration areas distracting workers so they can steal a document or laptop, or peek at information on a computer screen. Such thieves may work in teams and distract registration staff with tactics such as asking

questions and outright flirting, says May.

- **Watch out for meeting "tailgaters."**

If somebody tailgates into a meeting with stolen or falsified identification or by other means, then conversational confidentiality is lost, cautions Burgess.

"There is a general human acceptance that, in the enclosed environment of a company event where people wear event badges, sharing can occur. Think about what an interloper would learn by standing near a group of executives and just listening," he adds.

Basic Recipe for a Crisis Plan

Good crisis management starts with creating a plan, and, according to McIndoe, it should cover the following 10 areas:

1. **Policies and procedures.**

Have policies in place and procedures to follow them. "Most meeting organizations we work with have very limited policies and procedures," says McIndoe. The main problem with crisis management plans is the lack of them, he says.

2. **Train meeting staff.**

Lack of training tends to be the weakest link in virtually all crisis management plans, says McIndoe. Staff must know how to implement the plan within each meeting venue.

3. **Data management and collection.**

Planners must ask two key questions: What data is collected, and how will it be managed and protected?

4. **Risk assessment.**

This step involves analyzing and researching the destination and venue. "We examine the general safety of the building and its security and evacuation measures. We look at local risks in the destination like the availability and time of medical response, and a hotel's food and water handling," says McIndoe.

5. **Communication and**

notification. "What if there is a shooter on the premises? How do you communicate with staff?" asks McIndoe. Have at least three ways to communicate with staff during emergencies — two-way radio, cell phones and the public address system as backup.

6. **Risk disclosure.**

Prior to the meeting, notify corporate groups about potential risks and mitigation plans. For example, serving alcohol at an open bar presents risks that include access control, age validation and drinking too much.

7. **Risk mitigation.**

Plan actions ahead of time to minimize potential threats. "Say a medical facility is an hour's drive away. You could mitigate the risk by providing onsite emergency care," McIndoe suggests.

8. **Risk monitoring.**

Stay updated on any situation that could impact the meeting. Examples are potential social unrest and weather forecasts that may impact a destination.

9. **Risk response.**

This step involves actions taken immediately after a crisis or threat. Responses must be as detailed as possible.

10. **Risk incident management.**

This step combines, risk assessment, risk disclosure, risk mitigation, risk monitoring and risk response into a cohesive strategy for handling risks.

Work With Your DMC and CVB Partners

Security experts advise that, in addition to having their own crisis management plan, planners should work with CVBs, DMCs and vendors that have specific plans in place. Some CVBs and DMCs consider knowledge of local security measures to be part of their expertise on a destination. "It is imperative that we be experts at get-

ting assistance when it needs to happen," says Thomson-Palermo. "We must know how to make our plan apply to whatever crisis happens. People hire us for our knowledge of the destination and that knowledge includes how to protect the health and well-being of guests to the area."

To that end, each of RMC's seven offices throughout Colorado — some based in resorts and others with their own separate locations — has a crisis management plan tailored to its branch. "The plans provide for a range of things, including medical and transportation emergencies, safety emergencies, earthquakes, hurricanes, viral

"You must do worst-case planning in order to come up with the nuts and bolts of the plan. Try to come up with every potential crisis that can happen to a meeting, starting with people flying in."



Steven B. Fink
President and CEO
Lexicon Communications Corp.
Pasadena, CA

threats — every type of crisis that you can imagine," says Thomson-Palermo.

You Never Know

Planners who lack crisis management and information security plans and don't address the issue may never face a serious problem. On the other hand, a crisis could strike at the very next meeting, ruin it, and, at the very least, damage a planner's reputation for preparedness. That's why security experts urge all professional meeting planners to include crisis management as an integral part of planning every meeting or event from the very beginning. **I&FMM**

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Mary Jobb was named director of sales for the Waldorf Astoria Orlando and Hilton Orlando Bonnet Creek both in Orlando, FL. A 20-year veteran of hospitality sales, Jobb most recently served as vice president of sales with LXR, Luxury Resorts & Hotels.

Joanne Salazar was named director of group sales at Lansdowne Resort, Leesburg, VA. She formerly served as assistant director of sales for the Hilton Washington Dulles Airport, Washington, DC.

Gail Wargo was named director of sales and marketing at The Westin Hilton Head Island Resort & Spa, Hilton Head Island, SC. She is a recent retiree from Marriott International,

where she served for 30 years in sales leadership.

The San Diego Tourism Authority (SDTA) has promoted **Barbara Greenhalgh** to vice president of sales, Western region. She has served as regional director of sales at SDTA for the past eight years.

Richard Ross was named vice president of sales and marketing for the Hilton Sandestin Beach Golf Resort & Spa, Destin, FL. He was most recently vice president and director of sales and marketing for Remington Hotels based at Hilton Fort Worth, Fort Worth, TX.

Sarah Cardenas was promoted to group sales manager for The Naples Beach Hotel & Golf Club, Naples, FL.

She most recently served as catering and conference services manager at the resort.

Conrad New York has named **Paul Holden** as director of sales and marketing. Most recently, he was with the Hilton Short Hills, New Jersey.

L'Auberge Del Mar, Del Mar, CA, has promoted **Robert Harter** to director of sales and marketing. He formerly served as the hotel's director of sales. **Jeffrey Livingston** was promoted to director of sales. He was previously associate director of sales. **Jamie Clave** was named sales manager responsible for the San Diego and Southwest markets. She was sales manager at Estancia La Jolla Hotel, La Jolla, CA.

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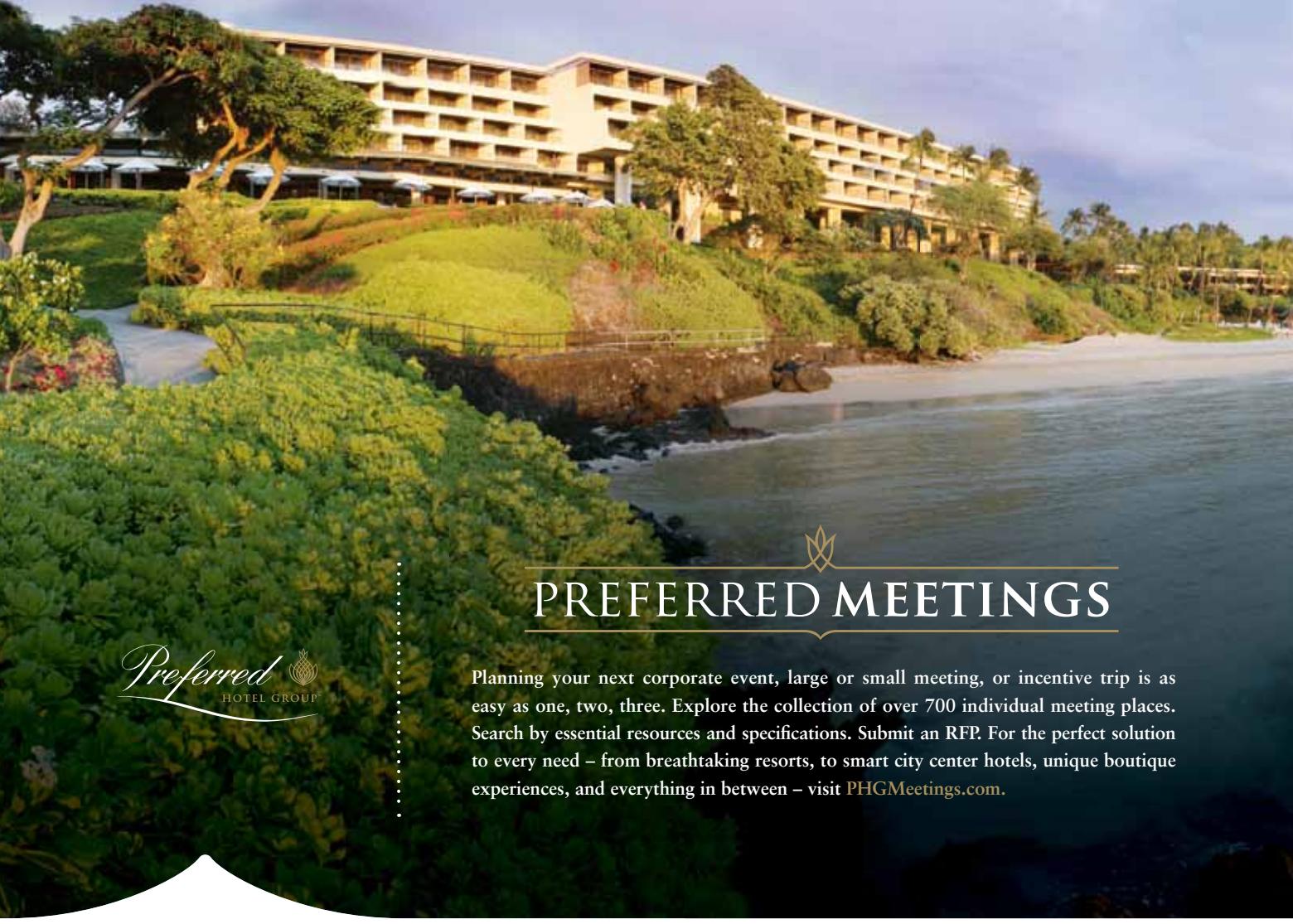
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