

Introduction

There is some similarity in the logistics for any event, no matter what the size, i.e. joining instructions, reception, badges, refreshments and parking. However, the differences between smaller events (up to around 50 people) and larger events is the amount of planning and attention to detail that needs to take place.

The only way to approach logistics for any event is from a participant focus. Once you start thinking of processes that make logistics easier - but more difficult for the participant – you're lost! And logistics, facilitation and event design go hand in hand - you cannot do one in isolation of the other.

Where To Start

Once the initial idea has been voiced about holding an event then the planning process starts. Questions at this stage will be:

Date – Venue – Numbers – Costs – Constraints – Who is going to manage logistics?

The Design Process

Events are designed using a group of people from across the system – referred to as a Design Team. There are specific needs for this meeting, i.e. room, flipcharts, refreshments. As logistics manager it's important that you attend the design meetings to:

1. Hear the discussions around the event and the processes. **Important because** – Understanding the design team rationale for the decisions they make and the options they decide against will enable the logistics manager to fully understand the needs of the group, alternatives to avoid or other more creative options if things do not run exactly to plan.
2. Give input on any logistics issues that you are aware of at this time. **Important because** - Design Team members may have limited experience of how participative events are organised, some or no knowledge of the venue, location etc. Essentially they do not know what they do not know about the complexity of logistics. There may be creative options that you can offer when they are considering the design specifics.
3. Be part of the event delivery team. **Important because** – Decisions are often required in real time to overcome unforeseen problems or emerging issues. Logistics Managers and Facilitators alike may become aware of changes and need to constant update each other about changes to plans or simply letting each other know about emerging issues so that options can be considered.

The Design Team will help with some questions – and there are times when you just need to make the decision. Once the Design Team is over, then the logistics work starts in earnest.

- **Date** - Has the date been agreed? Is it fixed? Is there any flexibility?
- **Venue** - Where is the venue? What's the most appropriate venue given the location of participants, accessibility, numbers and cost constraints? Who can help you find the venue i.e. a venue finding company? Are you able to say what your requirements are in terms of the venue i.e. number of breakout rooms?



- **Invitation** - What does the invitation look like? What does the invitation need to say at this stage? Will you be sending more than one invitation/set of joining instructions (including map, parking, etc.)? What is the process for participants letting you know they are attending? Who am I sending the invitation to (list)?
- **Event Planning** - What processes have been designed and what equipment is needed to support the processes? What will the event packs look like? Is there an event logo/title? How many flipcharts are required? Does the venue have an AV system or do you need to hire one in? How many microphones are needed?
- **Support** - Who will support logistics on the day – how many stewards are needed? Where are the stewards coming from, and how and when will you brief them on the design of the day?

Event Planning

When planning any event try to imagine the questions one person may have:

- What transport should I use? Is there parking? How far is the walk from the station to the venue?
- What's the latest time I can arrive so I don't miss the start?
- What is the earliest time can I get away?
- Can they cater for my diet and how do I let them know? Is there a crèche?
- How can I be contacted on the day?

Now multiply these by the number of participants attending. The more participants, the more questions they will ask. Ensure you have a process in place for responding to these questions right from the outset. This will help put people at ease even before they arrive.

Invitations and joining instructions should aim to answer most of the above questions. **Tip** - you can't repeat the joining instructions often enough.

The Venue

There are some specifics you can work with at the outset when looking for a venue:

- Room size – preferable with no pillars.
- Full accessibility.
- Comfortable chairs.
- Reception area.
- Depending on the event you may need bedrooms.
- Natural light in the room (essential for meetings lasting more than one day).
- Availability the day/evening prior for set-up.
- Wall space for flipcharts/graphics.
- Additional space for lunch/refreshments.

Room Size

The room needs to be sufficiently large enough to hold circular tables which have 8 participants at them plus room to have a flipchart beside each table - not too close so as to be dangerous with people tripping up. (Consider if people have access difficulties, i.e. in a wheelchair).

The size to aim for is about 20 sq. ft per person. If your event is for 150 people you need a room 3000 sq. feet (or 333 sq meters/yards). If the venue seats 150 for a banquet it will only seat about 80 to 90 for a large-scale participative meeting.

Formula

20 sq feet x number of participants divided by 9 = square yards (meters) of room.

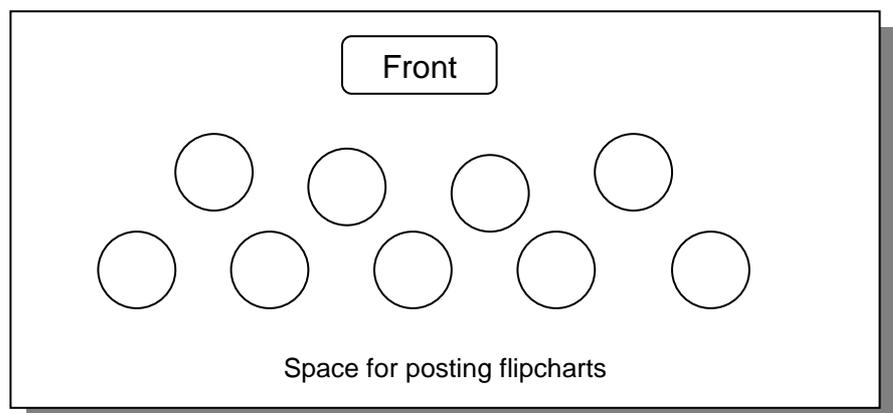


I always try for a room that seats at least double the number of participants - it is better to have too much room than not enough. This style of working is new for many venues and you may find venue managers will promise you the room seats up to 150 people – so be explicit with the details.

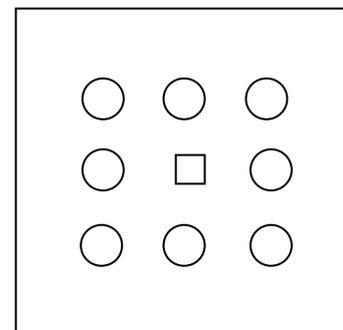
Pillars are a problem and only a very few occasions can they be used to an advantage. Some venues have a balcony and the pillars support the balcony. You can use the space behind the pillars for posting and leave the body of the room for the event. Otherwise avoid venues with pillars. The only exception would be if you have that much space that you can position the tables so that each table has an unobstructed view of the facilitation team.

Room Layout

Orientate the room so that the side or longest wall becomes the 'front'. Leave space around the edge of the room for people to walk along and have a look at the flipcharts that are on the walls and to be able to get coffee etc.



Another option is to have the dais (stage) in the middle. This does not work well if you have a long, narrow room. You also need loud speakers that can be amplified across the whole of the room and it is difficult to use a lectern.



'To scale' plans are fiddly and essential. Remember that beside each table you will need a flipchart and if you are going to have sufficient space for people to walk through the tables, then layout planning is vital.

If possible have the refreshments at the side or back of the room. This allows participants to take responsibility for their own needs whilst staying connected with the work of the tables. One thing to consider though is how and when will the venue replenish clean cups etc. without disturbing participants. The last thing you want is a speaker 'drowned out' by coffee cups rattling.

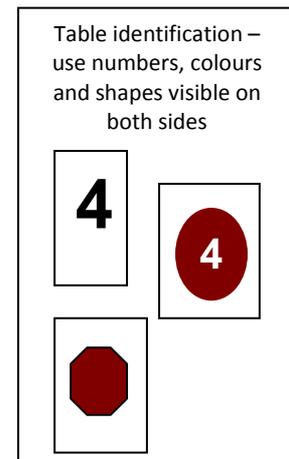
Tables

For 8 people we use 5' round tables and for 10 people we would use 6' round tables. Six feet round tables for groups of 8 people make the conversations more difficult.



Each table will need some basic stationery, i.e. paper, pencils and a table number. The number needs to be easily seen visible on both sides. Use colours and shapes if tables are sharing their work or if groups are sharing microphones. It is helpful to have a tray on each table - the type you have for 'in' trays on your desk at work. Some of the handouts will be in the trays as people arrive and some will be placed in there throughout the day. This builds a 'working atmosphere' as well as supporting ongoing delivery of handouts and materials and keeping the tables tidy.

Each table requires a flipchart and a minimum of a couple of dark markers (blue or black). Also order a couple of flipcharts for up front. Flipcharts can be hired, usually along with any AV equipment.



Audio Visual Equipment (Microphones)

For larger meetings it is essential to have a good AV System. It can seem an unnecessary expense but we would always recommend having the equipment delivered on set-up day and doing a full rehearsal with the sound technician. Give the technician a copy of the plan for the day and practice the feedback using all of the stewards. Walk around every corner of the room speaking into all of the microphones. Note any points where feedback through the AV System occurs and ensure all stewards, facilitators and speakers are briefed well. **Tip** - AV companies promise the earth, and deliver little! Spare no expense to have the right system and the right technician.

Reception

There needs to be a space identified to deal with reception. This will be handing out any type of registration pack/folder that may include things like the agenda, pointing people in the direction of coffee, toilets, cloakroom etc. You may want to include at the registration point a 'head count' for health and safety reasons.

For larger events, alphabetical registration can speed up the process. **Tip** – first name only on badges makes registration very difficult. As a minimum have first and surname on the badge or pack.

Refreshments

Refreshments need to be 'on tap' all day - that means coffee and tea available at all times, not just official breaks. This allows participants to self-manage their work.

Consider where refreshments are in relation to the main meeting. Having it at the side of the main room allows people to take responsibility for themselves and they can still hear and see what is going on in the room. Having it in another side room can sometimes stop people getting up for a drink or to stretch their legs, as they don't want to miss what is being said. This is something you need to discuss with your venue. Use of good quality disposable cups will cut down on noise and the clearing away process if refreshments are served in the main room.

Table water – jugs of tap water are cheap although some venues will charge for hiring the jugs. Check how much venues charge for bottled water, as it can be extortionate. Some venues will even charge corkage if you bring your own water.

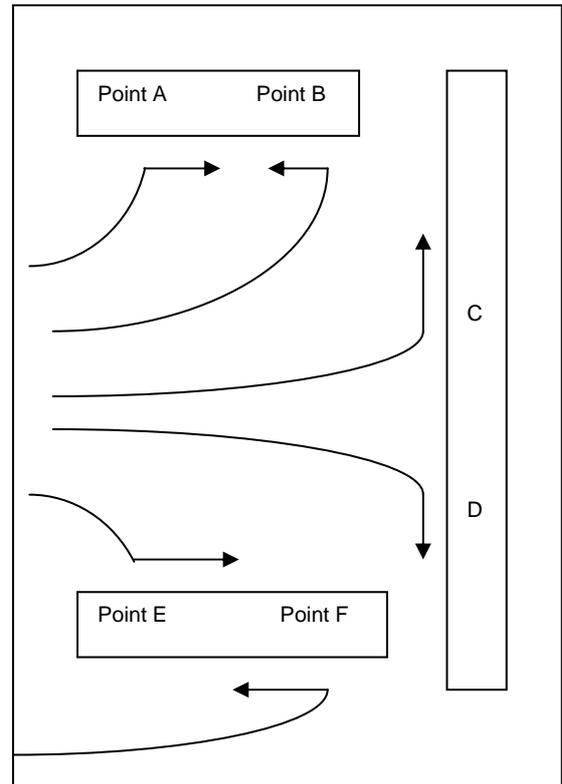


Lunch

The main criterion for lunch is that it has to be served quickly. If there are 150 people at your meeting, and they have 45 minutes for lunch, the venue must guarantee that everyone will be served in a maximum of 5 to 10 minutes. This may mean having several serving points. Allocate tables to serving points to ensure a smooth flow of people, i.e. tables 1 to 6 at point A, tables 7 to 12 at point B etc. Don't forget you can use both sides of the serving tables.

Coffee after lunch – serve this back in the main room. This can cut down on time as it encourages people to return to the main room and helps facilitate the afternoon starting on time.

Tip – cutting down on the number of items on the menu reduces time - the more choice, the longer the queue. Up to about 6 items is manageable, after that expect longer queues.



Logistics HQ

This sounds a grand title for a desk or area where all the logistics are co-ordinated from. This is where:

- Handouts that are not in the packs at the start of the day will be counted for distribution to tables.
- Spare paper, pencils, bluetac etc. will be kept.
- Messages can be left.
- Stewards get instructions from and report back to.
- Consultants liaise with logistics over any changes to the process.
- Visitors are greeted.
- A central liaison point for the venue.

Even for very small events, you need somewhere for this to be located. Ideally it needs to be in the rear corner of the room or at the very least next door and be manned by someone who is a stickler for detail but at the same time flexible enough to respond to change when the situation needs to.

Stewards

Stewards have a variety of duties which include looking after the tables, ensuring handouts are given out either on cue or during breaks, help to get flipcharts to the tables, posting flipcharts onto walls, reception duties, looking after microphones any many more.

How many? The formula we use for large events is a logistics manager, one 'table' steward to every 5 or 6 tables, a logistics HQ steward and one to look after the venue. This assumes that table stewards double up as microphone stewards. If you have the luxury of plenty of stewards and you are using this as a learning experience (so that stewards can run their own events) then allocate separate table and microphone steward roles.



Stewards must be briefed on the design. We recommend holding a briefing session the afternoon or evening prior to the event. Do not do this too far in advance of the event, as there may be changes to the programme.

A good steward will:

- Be totally participant focussed.
- Always be aware of where we are in the programme for the day.
- Understand the implications if we are running late on refreshments, lunch and other processes for later in the day.
- Listen to the facilitation input, especially the timings for pieces of work.
- Help tables do good work – be around their group of tables to answer questions or obtain any additional equipment.
- Report back quickly to the facilitation team if tables are struggling/don't understand the process.

A good steward will not:

- Interfere with the group's work, e.g. checking that the group is following the written instructions; that they have written on flipcharts; that they have shared the "correct information".
- Leave the area they are caring for without letting colleagues know – working in pairs or teaming around groups of tables helps avoid this and enables the stewards to take breaks.
- Tear down groups work or begin clearing up until the design or logistics manager indicates that the time is right. Participants often need materials produced earlier in the event to use as resources later on.

Equipment

This is a preliminary list some of the equipment you may need to consider:

- Flipchart easel for each table plus 2 or 3 for the front. Unless your organisation has plenty, hire these from the company supplying the AV equipment.
- Flipchart paper – one pad per easel.
- Marker pens (water based) – 2 or 3 pens per table (minimum black and blue). Some people prefer chisel type nibs although there is no hard and fast rule about this. **Tip** – dry white markers run out very quickly if used on flipchart paper. Avoid red and green markers which are hard to read at a distance.
- Bluetac, masking tape or Scotch Magic Tape for putting up the flipchart output. (If using an external venue, check with them whether they will allow you to use tape or bluetac. If necessary, take the tape to the venue to show them that it won't destroy the wall. Plain plaster walls that have been painted look good – watch out for the paint peeling off when removing the tape!)
- Post-It™ Notes – minimum size of 3" x 5". These can be divided into a half or a third of a pad per person.
- Name tags/badges. Use badges that both clip and pin on, or, as a cheaper alternative, use sticky labels.
- Event pack – to contain the handouts and any materials for the day. Avoid packs that have Velcro fastenings, press-studs or zips. They make too much noise when opening them. If you are not using tables at the event, consider purchasing packs that have a hard surface that enable participants to lean on to make notes during the day.
- Floor plan of the tables with table numbers. This is required for both participants and steward/facilitation team.
- Table plan for allocating participants to the tables (probably alphabetical). You sometimes need different configurations of participant lists – by alphabet, by geographical location, by work unit.
- Spare paper for tables and spare cards for ad hoc signs.



- Pencil or pen per participant. **Tip** - Stewards and the facilitation team use lots of pens! They usually put them down and lose them or hand them to participants – have plenty of spares.
- Sufficient paper for handouts and paper clips.

Set Up (Staging)

One thing to consider is when you will have access to the room to lay out the tables etc. especially if you need to be ready to start first thing in the morning. As a minimum you would need access from the afternoon before but preferably all day before. This allows time to brief the stewards at the venue, lay out the tables, make sure the tables, microphones, registration desks etc. are all ready and allows the stewards time to familiarise themselves with the venue, i.e. location of toilets, cloakroom, refreshments etc.

Tip - leave very little to the morning of the event. This time is always taken up with last minute venue liaison issues and disappears extremely quickly.

Costs

Costs vary greatly depending on venue and your budget. A community event in local hall with simple (but nourishing) buffets, e.g. for a Future Search (64 people over 3 days), can cost as little as £40 per person in total. Add to this the cost of hiring the hall and any equipment you need, i.e. flipcharts, butchers paper, Mr Sketch pens etc.

Large events using Real Time/Open Space/Conference Model methodologies in hotels and conference centres will start at around £40/£60 per person, per day. Add to this probably between £10 and £20 per person, per day, for all the additional unseen costs, i.e. flipcharts, microphones, stationery, additional rooms for logistics and breakout sessions, signage, photocopying etc, etc.

Unless money is no object and you can have multi-screen projection to every corner/wall of the room then avoid OHPs.

Managing the Whole Process

The pattern of work for this type of event is typically:

- Three to four days at the beginning of the planning stage. This is the time when you source the venue and provisionally arrange equipment etc. It is during this time that you set up the venue for the design/planning team meeting including sending them any information on the design/planning meeting itself.
- The design/planning meeting – a one to two day meeting. This is followed by time typing-up the output and putting together the invitation and any marketing materials.
- About a week of activity when you have the names of the participants and joining instructions etc. are sent out.
- On-going work to monitor numbers of participants and send any new joining instructions. This really depends on the type of event and can take from an hour per day or one to two days per week.
- Finally, for large events, the whole of the week prior is usually spent copying handouts and making signs, badges, conference packs etc. During this week your numbers will go up, down and up again. People drop out, new people confirm, people swap places.

It is difficult for this work to be slotted in on top of an already full day job. You have to let something go to be able to do this well and give it the time it needs for the event to run smoothly and for you to stay healthy!



Doing nothing is not an option! If you are running a two or three day event, and the evaluations at the end of day one contain logistics comments, then sit up and take notice, especially if it is something important like the air conditioning, or drilling/banging going on outside the venue. Feed back to the facilitation team what you are doing to improve any logistics issues. This information will be given to participants at the start of the next day.

Don't take it personally – evaluations at the end of the event can contain comments about logistics. For example, “didn't like the dessert!” Don't take them all to heart – treat it as data.

If you are holding a one-day event then there is nothing you can do about the fact that some people didn't like dessert. Take it on board as learning for future events. Over time you will build a wealth of knowledge of the best processes that work for your organisation.

The Zamboni Principle

The Zamboni machine polishes the ice at an ice skating rink to ensure that there are no unexpected bumps, ruts or glitches. Good event logistics runs like a Zamboni machine - unseen but ensuring the surface is even and calm.

VISTA Consulting

VISTA Consulting specialises in Meeting Design and Facilitation. Our events/meetings always relate to 'real work'. Our logistical work comprises:

1. **Complete event management** - from sending invitations, dealing with bookings, organising venues, providing stationery and equipment, providing a team of stewards to manage the process on the day.
2. **On the day** – where a client is happy to deal with the invitations and booking process and we support the work of the day. We would also work with the client throughout the design process to ensure that all of the necessary equipment is obtained.
3. **Advice** - supporting clients with telephone or face-to-face advice that are undertaking all of the logistics work themselves.

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