

Introduction to Event Planning



FBLA High School Competitive Events Guidelines

2022–2023

Case Study Events

Overview

These events consist of a case study. In many cases, these events consist of two parts: an objective test and an interactive case study. A 60-minute objective test will be administered on-site at the NLC. Team competitors will take the test individually and team scores will be averaged. Please check specific event guidelines to determine whether or not the event has an objective test.

Eligibility

Each state may submit up to four entries. Competitors must have paid FBLA national and state dues by 11:59 p.m. Eastern Time on March 1 of the current school year.

NLC Registration

Participants must be registered for the NLC and pay the national conference registration fee to participate in competitive events.

Finals

Case study events with an objective test: The top fifteen scoring individuals/teams advance to the final round.

Case study event that do not have an objective test: Fifteen finalists, or an equal number from each group in the preliminary round, will advance to the final round.

Banking & Financial Systems
Business Management
Client Service
Entrepreneurship
Help Desk
Hospitality & Event Management
Impromptu Speaking
International Business
Introduction to Event Planning
Management Information Systems
Marketing
Network Design
Parliamentary Procedure
Sports & Entertainment Management

Introduction to Event Planning

9th & 10th grade only

Event Type: I or T

Equipment Setup Time: N/A

Prep Time: 20 minutes

Performance Time: 7 minutes

Warning Time: 6 minutes

Time Up: 7 minutes

Q&A: N/A

Objective Test Competencies

- Event management customer service skills
- Management skills for successful event planners
- Event staffing
- Legal aspects of event planning
- Convention management
- Designing and executing an event
- Crowd control at an event
- Pricing for events
- Event planning careers
- Supply chain management for an event

Case Overview

A scenario in the event planning industry.

Performance Guidelines—Final Round

- Two 4" x 6" note cards will be provided to each competitor and may be used during event preparation and the role play. Information may be written on both sides of the note cards. Note cards will be collected following the role play.
- No additional reference materials are allowed.
- Individuals/teams should introduce themselves, describe the situation, make their recommendations, and summarize their cases during the role play.

- If participating as a team, all team members are expected to actively participate in the role play.
- All questions raised in the case must be addressed during the role play.
- Turn off all electronic devices.
- Objective test scores will be used to break a tie.
- Performances are not open to conference attendees.

Objective Test Guidelines

- Team members will test individually and team scores will be averaged.
- No materials may be brought to the testing site.
- No calculators may be brought into the testing site; calculators will be provided.
- Electronic devices must be turned off and out of sight.
- Bring a writing instrument.

Penalty Points Deducted by Judges

- Competitors may be disqualified if they violate competitive event guidelines.
- Five points are deducted if competitors do not follow the dress code.
- Five points may be deducted for each instance of not following guidelines.

FBLA Introduction to Event Planning Test Study Guide

Competency A: Event Management Customer Service Skills		NEEDS: 15
Task / Skill		
1. Explain the importance of listening to the customer.		
2. Understand the value that the customer associates with their personal event.		
3. Understand the demographics of customers for different types of events.		
4. Plan events that fit the budget of customers.		
5. Meet the expectations of event customers.		
6. Explain the event contract to the customer.		
7. Explain important communication skills for event planners.		
8. Demonstrate an appreciation of the event value for the customer.		
9. Understand related needs and services for event participants.		
10. Manage customer expectations and implement communication check points.		
11. Explain how to handle objections and difficult clients.		
12. Determine strategies to help indecisive clients make firm decisions.		
13. Explain the power of customer service feedback on social media.		
Competency B: Management Skills for Successful Event Planners		NEEDS: 14
Task / Skill		
1. Describe the skills needed for a successful event planning career.		
2. Explain the importance of multitasking for event planning.		
3. Explain the financial management skills required by event planners.		
4. Understand the importance of following a budget for the event customer.		
5. Define the importance of time management skills for event planners.		
6. Describe the creativity possessed by successful event planners.		
7. Explain strategies to diffuse challenges and difficult situations.		
8. Create staffing schedules to accomplish tasks.		
9. Manage vendors and understand their duties.		
10. Create budgets to meet clients' expectations.		
11. Explain the importance of professional networking in the event planning industry.		
12. Explain the importance for developing leadership skills by actively participating in organizations like FBLA.		

FBLA Introduction to Event Planning Test Study Guide

Competency C: Legal Aspects of Event Planning		NEEDS: 13
Task / Skill		
1. Explain the elements of a contract.		
2. Explain how the event deposit works.		
3. Understand the impact of food permits on event planning.		
4. Describe the role of the fire marshal for an event.		
5. Explain the need for security for all types of events.		
6. Explain the legal implications of special effects (example: fireworks at an event)		
7. Explain how a pandemic impacts events of all sizes.		
8. Explain the importance of risk management for events.		
9. Describe the importance of customer safety at events		
10. List risk management requirements for events that may cause issues.		
11. Explain the rationale for event insurance.		
Competency D: Event Staffing		NEEDS: 13
Task / Skill		
1. Explain the importance of adequate staffing for an event.		
2. Describe the dress code for events.		
3. Define a staff timeline and needs list.		
4. Define Job descriptions for all staff members.		
5. List required permits for events involving food service (Food handlers, TABC, etc.)		
6. Describe check-in and check-out procedures for event planning.		
7. List pay ranges for event employees.		
8. Manage labor costs and hours to meet the budget.		
9. Minimize amount paid for employee overtime.		
10. Define a code of ethics for event staff.		
11. Describe training and development for event staff		
Competency E: Designing and Executing the Event		NEEDS: 12
Task / Skill		
1. Describe event design.		
2. Define effective event flow.		
3. Describe personnel needs for designing and implementing the event.		
4. Define ultimate customer service during the planning and execution of the event.		
5. Explain décor design and execution.		
6. Manage the stress associated with the day of the event.		
7. Create ROS (Run of Show) and manage the tasks.		
8. Create the BEO to handle Food, beverage, and set ups.		
9. Manage moving parts on stage or live feed via script and prompts		
10. Close out events with full reports of attendee counts, over/under budgets, and liabilities.		

FBLA Introduction to Event Planning Test Study Guide

Competency F: Convention Management	NEEDS: 12
Task / Skill	
1. Explain the financial value of a convention for a city.	
2. Describe all businesses financially impacted by convention events.	
3. Explain why and how cities compete for major conventions.	
4. Describe the relationship between number of hotel rooms and cities hosting convention events.	
5. Explain security concerns for large convention events.	
6. Explain how the chamber of commerce gets involved with convention events.	
7. Define room block minimums and attritions	
8. Understand food and beverage min and how it effects the over budget and cost.	
9. Handle attendee registration.	
10. Explain convention handbooks, goodie bags, etc.	
11. Handle sponsorships and onsite marketing	
12. Explain management of audio visual and sound requirements associated with event management.	
Competency G: Crowd Control at the Event	NEEDS: 11
Task / Skill	
1. Explain event traffic flow.	
2. Describe how to streamline an event.	
3. Explain the importance of attendee flow at an event.	
4. Describe the role of the fire marshal at an event.	
5. Create an event layout and flow diagram	
6. Follow fire marshal guidelines for events not to block exits.	
7. Explain special security for the events attended by political leaders (President, Congress, Major).	
8. Manage crowd control and develop the process for unwanted guests.	
9. Explain maximum event capacity and the need for accessible exits at events	
Competency H: Pricing for Events	NEEDS: 11
Task / Skill	
1. Explain the importance of working with the customer's budget.	
2. Describe the demographics for different event customers.	
3. Explain billing procedures for event management.	
4. Describe the need for payment plans for events.	
5. Describe the cost of events (weddings, celebrations, etc.)	
6. Explain cost ranges for product and services (Cake for 100ppl \$200-\$3,000), etc.	
7. Define guest counts and cost per person.	
8. Explain non-guest costs like entertainment, venue, etc.	
9. Match event prices to the budget for the event.	

FBLA Introduction to Event Planning Test Study Guide

Competency I: Event Planning Careers		NEEDS: 10
Task / Skill		
1. Define the role of an event planner.		
2. Describe the huge wedding planner industry.		
3. Explain the role of event space for venue managers.		
4. Explain the wide range of event careers ranging from detailed planning to high-level multitasking during event execution.		
5. Find salary ranges of event planners.		
6. Find companies that are hiring planners and their required qualifications		
7. Explain certifications or degrees related to becoming an event planner		
8. List different event planning sectors.		
Competency J: Supply Chain Management of an Event		NEEDS: 9
Task / Skill		
1. Define vendors for event planning.		
2. Explain the importance of relationships with the vendors.		
3. Describe financial negotiation with vendors.		
4. Describe vendor contracts and what should be on there		
5. Explain vendor set up, performance, and tear down timeline		
6. Explain the reason for vetting vendors to determine their qualifications and reliability.		
7. Explain vendor insurance and liability.		

FBLA Introduction to Event Planning

Bibliography:

https://www.mpi.org/docs/default-source/academy/mbecs-standards.pdf?sfvrsn=73a52050_2

<https://dpi.wi.gov/cte/resources/standards>

<https://www.cengage.com/c/sports-and-entertainment-marketing-4e-kaser/9781133602446PF/>

<https://tea.texas.gov/academics/college-career-and-military-prep/career-and-technical-education>

<https://smallbusiness.chron.com/competencies-hospitality-industry-13466.html>

Katherine Cheng, Houston Event Planning/Signature Manor, one of the top event planners in Houston, Texas, interview, July 13, 2020

Allison Wen, Safari Texas Ballroom, one of the top event planners in Houston, Texas, interview, July 14, 2020.

INTRODUCTION TO EVENT PLANNING SAMPLE TEST QUESTIONS

- 1) Successful event planners _____.
 - A) offer standardized services
 - B) exceed customer expectations
 - C) offer limited options to avoid confusion
 - D) meet customer expectations

- 2) Something of value that must be exchanged in order to have a valid legal agreement.
 - A) genuine agreement
 - B) capacity
 - C) consideration
 - D) mutual assent

- 3) Before hiring a vendor, you should obtain _____ to avoid liability expenses.
 - A) the description of costs and payment terms
 - B) their tax forms
 - C) the complete description of their service
 - D) proof of insurance, bonding, and other risk-management practices

- 4) When an event planner creates a budget for an upcoming event they should _____.
 - A) over promise and under perform
 - B) slightly over-estimate expenses
 - C) under-estimate expenses to get the business
 - D) use the most conservative amounts for expenses

- 5) Pandemic _____ relies on nonpharmaceutical interventions such as hand hygiene, travel restrictions, school closures, and social distancing.
 - A) mitigation
 - B) allocation
 - C) management
 - D) security

- 6) Buying insurance represents risk _____.
 - A) elimination
 - B) assumption
 - C) management
 - D) avoidance

- 7) Temporary food establishments operated in conjunction with a fair, festival, or community event are generally limited to _____ consecutive days of operation.
- A) 7
 - B) 30
 - C) 3
 - D) 14
- 8) This technique can help to reduce overtime by allowing staff to work at times convenient for them.
- A) training plans
 - B) developmental allocation
 - C) flexible work schedules
 - D) freelancing strategy
- 9) Workplace stress can be heightened when _____.
- A) no timeframe is set
 - B) boundaries are established
 - C) time is allowed for employee recharge
 - D) wellness activities are encouraged
- 10) An item-by-item sequence of events that will happen within an event.
- A) run of show
 - B) shot-list
 - C) showdown
 - D) blockade
- 11) Cities are more likely to host large conventions when they have _____.
- A) enough hotel rooms near the convention center
 - B) predominantly limited-service hotels that cost less
 - C) a large vibrant population
 - D) predominantly high-priced luxury hotels

- 12) A private room where event VIP's or speakers can relax or meet with individual guests.
- A) blue room
 - B) red room
 - C) green room
 - D) orange room
- 13) The wedding cake for 150 guests cost \$4,200. What was the cost per guest?
- A) \$35
 - B) \$30
 - C) \$25
 - D) \$28
- 14) Event planners who _____ make the best salaries.
- A) work in specialized industries
 - B) plan weddings
 - C) work for nonprofit organizations
 - D) specialize in fund raising
- 15) Vendors at a conference can _____.
- A) determine when to tear down their booth
 - B) tear down their booth when the conference ends, or as agreed upon
 - C) tear down their booth when foot traffic of event participants has diminished
 - D) tear down their booth at will

- 1) B
- 2) C
- 3) D
- 4) B
- 5) A
- 6) C
- 7) D
- 8) C
- 9) A
- 10) A
- 11) A
- 12) C
- 13) D
- 14) A
- 15) B

FBLA INTRODUCTION TO EVENT PLANNING

SAMPLE CASE STUDY

PARTICIPANT INSTRUCTIONS

1. You have 20 minutes to review the case.
2. Presentation time is seven minutes. At six minutes the timekeeper will stand and hold up a colored card indicating one minute is left and at seven minutes the timekeeper will stand and hold up a colored card indicating time is up.
3. The presentation is interactive, and the judges will ask questions throughout the presentation. You are a team of sales and event management specialists at a large, national chain's flagship hotel in the Mid-Atlantic Region of the United States.
4. Each team member will be given two note cards. Note cards will be collected following the presentation.
5. All team members must participate in the presentation as well as answer the questions posed by the judges. Cover all the points described in the case.

PERFORMANCE INDICATORS

- Outline a strategy for effective communication.
- Demonstrate a customer service attitude.
- Define the types of room rates in a hotel.
- Describe the latest trends and technologies affecting business travelers.
- Describe services offered by hotel personnel.
- Explain special considerations for international guests in the hospitality industry.

OVER

EXAMPLE CASE STUDY SITUATION

You are a team of sales and event management specialists at a large, national chain's flagship hotel in the Mid-Atlantic Region of the United States. The flagship hotel is an 800-room facility, complete with large-scale conference and banquet facilities that can accommodate up to 3000 people. The mixed-use facility has been predominantly used for trade shows, conferences, and parties. Themed weddings have become the leading revenue source. Unlike traditional weddings, themed weddings require more planning and time to set up. A typical themed wedding can be three to four times the cost of a traditional wedding, making it highly profitable for the event planning company.

The event facility is located in the suburbs of a large, metropolitan Mid-Atlantic city, less than 25 miles from city center and all major attractions. The location, known for its rich history and entertainment value, is a favorite tourist destination. The sales team works year-round and the event management team ranges between eight to twelve members seasonally. The busiest months for the event planning company are May, June, September, and October. January, February, and March are the slowest months for the event planning company.

Your challenge is to organize a themed wedding event for the bride and groom who live in Canada but will be moving to the city after their wedding. The event will begin on a Wednesday and go through Sunday with events planned each day for out-of-town visitors attending the Saturday afternoon wedding. You will meet with the couple and their family members who will be visiting the area on vacation to view the facilities while there. Due to the limited time to meet with the clients, your team will need to develop a preliminary plan of action for the wedding and create a list of questions that will help your team plan a spectacular, memorable themed wedding.

Your team has the option of doing in-house and out-of-house activities for the week prior to the event with the wedding itself being held at the facility on Saturday evening. Be sure to consider the excursions for out-of-town guests and value added options for planned activities. Your team will need to consider the logistics for registrations, check-in/out, group reservations, and transportation when presenting to the clients. You must address the following in your presentation:

- The scenario and the scope involved.
- Effective solutions for meeting the customer's needs.

Propose a schedule for the clients that will include future meetings and types of products/services to be provided.

HIGH SCHOOL - INTRODUCTION TO EVENT PLANNING

Performance Rating Sheet

(Mark one score per row **AND** write score in the Points Earned column. Use Tie Breaker column to add or subtract points to break ties.)

Expectation Item	Not Demonstrated		Below Expectations		Meets Expectations		Exceeds Expectations		Points Earned	Tie Breaker
Demonstrates understanding of the case study and defines problem(s) to be solved	No description or case study synopsis provided no problems defined		Describes and provides case study synopsis OR defines the problem(s)		Describes and provides case study synopsis AND defines the problem(s)		Demonstrates expertise of case study synopsis AND definition of the problem(s)			
	0	<input type="radio"/>	1-5	<input type="radio"/>	6-10	<input type="radio"/>	11-15	<input type="radio"/>		
Identifies alternatives and the pro(s) and con(s) of each	No alternatives identified		Alternative(s) given but pro(s) and/or con(s) are not analyzed		At least two alternatives given, and pro(s) and con(s) are analyzed		Multiple alternatives given and multiple pros and cons analyzed for each			
	0	<input type="radio"/>	1-7	<input type="radio"/>	8-14	<input type="radio"/>	15-20	<input type="radio"/>		
Identifies logical solution and aspects of implementation	No solution identified		Solution provided, but implementation plan not developed		Logical solution and implementation plan provided and developed		Feasible solution and implementation plan developed, and necessary resources identified			
	0	<input type="radio"/>	1-7	<input type="radio"/>	8-14	<input type="radio"/>	15-20	<input type="radio"/>		
Demonstrates knowledge and understanding of the event competencies: Customer service skills/management skills/event staffing/legal aspects/convention management/designing and executing an event/crowd control/pricing/careers in event planning/supply chain management	No competencies demonstrated		One or two competencies are demonstrated		Three competencies are demonstrated		Four or more competencies are demonstrated			
	0	<input type="radio"/>	1-7	<input type="radio"/>	8-14	<input type="radio"/>	15-20	<input type="radio"/>		

Delivery Skills

Statements are well-organized and clearly stated	Presenter(s) did not appear prepared		Presenter(s) were prepared, but flow was not logical		Presentation flowed in logical sequence		Presentation flowed in a logical sequence; statements were well organized			
	0	<input type="radio"/>	1-3	<input type="radio"/>	4-7	<input type="radio"/>	8-10	<input type="radio"/>		
Demonstrates self-confidence, poise, assertiveness, and good voice projection	Presenter(s) did not demonstrate self-confidence		Presenter(s) demonstrated self-confidence and poise		Presenter(s) demonstrated self-confidence, poise, and good voice projection		Presenter(s) demonstrated self-confidence, poise, good voice projection, and assertiveness			
	0	<input type="radio"/>	1-2	<input type="radio"/>	3-4	<input type="radio"/>	5	<input type="radio"/>		
Demonstrates the ability to effectively answer questions	Unable to answer questions		Does not completely answer questions		Completely answers questions		Interacted with the judges in the process of completely answering questions			
	0	<input type="radio"/>	1-3	<input type="radio"/>	4-7	<input type="radio"/>	8-10	<input type="radio"/>		
Performance Subtotal (100 max)										

Penalty Points (Mark all that apply)

Dress Code not followed	-5	<input type="radio"/>	Deduct 5 points for each instance of guidelines not being followed	- ____	<input type="radio"/>	Total Penalty	- ____	
Grand Total								
Objective Test Score (to be used in the event of a tie)								

Name(s):

School:

State:

Judge's Signature:

Date:

General Competitive Events Guidelines

The general event guidelines below are applicable to all FBLA High School national competitive events. Please review and follow these guidelines when competing at the national level. When competing at the state level, check the state guidelines since they may differ.

All members and advisers are responsible for reading and following competitive event guidelines.

Eligibility

- **Dues:** Competitors must have paid FBLA national and state dues by 11:59 p.m. Eastern Time on March 1 of the current school year.
- **NLC Registration:** Participants must be registered for the NLC and pay the national conference registration fee in order to participate in competitive events.
- **Deadlines:** The state chair, or designee, must register each state competitor on the official online entry forms by 11:59 p.m. Eastern Time on the second Tuesday in May.
- Each state may submit four entries in all events.
- Each competitor can only compete in one individual/team event and one chapter event.
- Each competitor must compete in all parts of an event for award eligibility.
- A team shall consist of two or three members. The exception is Parliamentary Procedure, which must be a team of four or five members.
- All members of a team must consist of individuals from the same chapter.
- If competitors are late for a competitive event, there are no guarantees they will get to compete. Competitive event schedules cannot be changed. **PLEASE NOTE** that competitive events start in the morning before the opening session of NLC.
- Competitors may be disqualified if they violate competitive event guidelines.
- Picture identification (drivers' license, passport, state-issued identification, or school-issued identification) is required when checking in for competitive events.

General Competitive Events Guidelines

Repeat Competitors

- Members may compete in an event at NLC more than once if they have not previously placed in the top ten of that event at NLC. If a member places in the top ten of an event at NLC, they are no longer eligible to compete in that event. This eliminates the exceptions for team events that were previously in place, as this change will now affect all events.
- **Modified Events:** A competitor may compete in the same event when the event is modified, regardless of placement at a National Leadership Conference. Note, if the only modification is a name change, competitors may not compete in the renamed event if they have previously placed in the top ten at the National Leadership Conference.
- **Chapter Events:** Competitors may compete in a chapter event as many times as they wish, regardless of placement at a previous National Leadership Conference (American Enterprise Project, Community Service Project, Local Chapter Annual Business Report, and Partnership with Business Project).
- **Pilot Event:** Competition in a pilot event does not disqualify a competitor from competing in the same event if it becomes an official competitive event. The participant may compete in another event as well as a pilot event.

Breaking Ties

- **Objective Tests:** Ties are broken by comparing the correct number of answers to the last 10 questions on the exam. If a tie remains, the competitor who completed the test in a shorter amount of time will place higher. If this does not break the tie, answers to the last 20 questions will be reviewed to determine the winner.
- **Objective and Production Tests:** The production test scores will be used to break a tie.
- **Objective Tests and Performances:** The objective test score will be used to break a tie based on the tie-breaking criteria of objective tests.
- **Reports/Projects and Performances:** The report/project scores will be used to break a tie.
- **Performances:** Judges must break ties and all judges' decisions are final.

General Competitive Events Guidelines

National Deadlines

- State chair/adviser must register all competitors for NLC competitive events online by 11:59 p.m. Eastern Time on the second Tuesday in May.
- All prejudged components (reports and projects) must be submitted by 11:59 p.m. Eastern Time on the second Tuesday in May.
- All prejudged projects and reports must be submitted electronically.
- All production tests must be submitted by 11:59 p.m. Eastern Time on the third Tuesday in May.
- All production tests must be uploaded online on the required platform.
- State chair/adviser may make name changes only (no additional entries) by 11:59 p.m. Eastern Time on the first Tuesday in June. Competitor drops are the only changes allowed after this date and onsite.

National Awards

- The number of competitors will determine the number of winners. The maximum number of winners for each competitive event is 10.

Americans With Disabilities Act (ADA)

- FBLA-PBL meets the criteria specified in the Americans with Disabilities Act for all participants who [submit an accommodation form](#).
- The form must be submitted by 11:59 p.m. Eastern Time on the second Tuesday in May.

Recording of Presentations

- No unauthorized audio or video recording devices will be allowed in any competitive event. Participants in the performance events should be aware the national association reserves the right to record any performance for use in study or training materials.