

## **PLANNING A MILITARY REUNION**

### **A Suggested Guide from Those Who Have Done It**

#### **I. General Advice**

- A. **Don't wait.** Start planning as soon as you accept the job as Reunion Coordinator (RC).<sup>1</sup> Don't be intimidated by what you imagine is ahead of you: decisions to be made, details to handle, and cracks for things to fall through. You are at the beginning of a long, detailed, and sometimes tedious job, but you are not the first and you don't have to invent everything from scratch. Lean on the experience of those who have gone before you.
- B. **Decide how you prefer to work,** solo or with a committee. There are pros and cons either way. If you are confident of your own abilities and have lots of time you might prefer to go it alone. Working solo is very efficient in that you are not constantly having to build consensus and keep others in the loop. Anyone who has worked on committees in any setting-- military, work, education, church, or civic-- knows that the cost in time and aggravation goes up as the square of the number of people involved. Working solo also eliminates the worry about whether or not tasks that have been farmed out are being done properly and on time. The downside of going it alone is exactly that; you are alone with all of the work and don't have the stimulation of regular discussions with people who can help you catch things that are about to slip through the crack. (A smart, energetic, patient spouse who has the time and inclination to get involved is a huge plus.)
- C. **If you want to work with a committee,**
1. Pick committee members whom you know to be competent and reliable. Don't get too hung up on finding people who live in or close to the venue city. Very little actually needs to be done

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<sup>1</sup>Abbreviations are defined on first usage and pulled together in a "Terminology" section at the end for ease of reference.

on the ground there after the venue hotel is selected. Almost all of it can be done online and via email. It is much more important to get people whom you know will do the job completely, correctly, and on time.

2. Look for natural ways to divide the workload that leave as little overlap and as few gaps as possible. For example, the RC might want to take personal charge of the venue hotel selection, with an assist from one or two people on the site visits. Major areas that could be farmed out might be activity and tour selection, finding a guest speaker, and setting up the hospitality room. Set progress dates in writing (email is fine) for any task to be done by someone else.

D. **Do your business via email** and minimize the use of the telephone. That gives you a written record of who said what to whom, and when, so that you can refresh your own memory and the memory of others as the need arises.

E. **Communications with members.** You likely will want to send out the emails yourself. If someone else does it for you, when people just click “Reply” then all of the replies will go back to that third person, who then will have to forward them to you. It usually is pretty easy to set up group email lists, depending on what email client you are using.

F. **Financial management.** You will want to do an exemplary job of managing and documenting the reunion finances. You will have a fiduciary duty and if you are not certain what that means then you should Google it.

1. **RULE NUMBER ONE: DO NOT CO-MINGLE** reunion finances with your own, which means do not run the reunion finances through your personal checking account. Two viable alternatives:

- a. Run everything through the Association’s operating

account. Very clean approach but somewhat awkward.

- b. Use a separate reunion bank account.
  - (1) Get some **seed money**, say \$1,000, from the Association treasurer, since you will have to pay for some things before the reunion checks start coming in.
  - (2) Use that check to open a **checking account** in the name of the reunion; e.g., HMM-262 Reunion 2030. Banks vary in their requirements for opening accounts but they all have gotten tighter. Your best bet for a hassle-free experience is to show them the document(s) that prove the existence of the Association as a legal entity.
  - (3) If you can get a **no-fee credit or debit card** on the reunion account it would be useful and worthwhile. You will be doing some point-of-sale payments, particularly as D-day gets closer: food and drink, hospitality room supplies, etc. A credit or debit card on the reunion account would keep you from having to use cash or your own credit card, which would complicate your financial record-keeping. Just be sure to incorporate all of the receipts into your records.
2. **Set up a spreadsheet** for a cash budget. This should be done early, because it is essential in determining the all-important registration fee, your main slush fund. In general terms, you budget for cash expenditures based on planned activities, which fall into two general categories.
  - a. First are those activities that attendees explicitly sign up for on the registration sheet and which associated costs are included in each attendee's total payment (banquet,

excursions, etc). They are self-financing and total costs are driven purely by attendance and participation. Accountants call these direct costs.

b. Second are those activities that are not associated with any a specific cost to a specific member (hospitality room, comped rooms for VIPs, cash bar setup before dinner, music for dancing, etc). Accountants would call these indirect costs, or overhead. The second kind of activities must be financed with the registration fee. In short, figure out what you need to spend on overhead and set the registration fee to provide for it. It does need to be done early, though, and should be at least a SWAG and not just a WAG. For example, if you just arbitrarily set a registration fee of, say, \$125 per capita and you have 200 attendees, you will receive \$25,000. Do you really need \$25k for overhead?

3. **Set up a spreadsheet** for all of your cash transactions. The spreadsheet should contain formulas to carry a running balance and each line should include validity cross-checks. You might start with an example from a prior RC. (If you need help, Chuck Johnson taught accounting and spreadsheets at the university level for 20+ years.)

#### G. **Document management**

1. **Try to visualize the paperwork** you are going to accumulate and a filing system to keep control of it before you get buried in it.
2. **Create a master email folder** to organize the hundreds of emails that you will be sending and receiving. You will add subfolders as the work unfolds.
3. **Get a thumb drive** for storing all of your electronic work product, including the stuff that you get from RCs from past

reunions. Back up your thumb drive regularly to your hard drive and to off-site (cloud) storage, e.g., Dropbox or similar. If you use automatic backup software, set it to make continuous or at least daily backups of that entire thumb drive. If not, make it a habit to back up the thumb drive at the end of every work session.

## II. Rough chronology of planning steps

- A. As soon as you can after accepting the RC job, **reach out to prior RCs** for electronic copies of the various letters, forms, worksheets, lists, and other correspondence that have been used in other reunions. Begin by looking over just the file names to get an overview of where you are headed.
- B. Choose the Venue City (VC)
- C. **Select the specific dates** for the reunion
  - 1. Find out if there are any major events or conditions that you need to work around. For example, for its 2013 Charleston reunion HMM-265 settled on May 19-23 (Sunday to Thursday) because (a) Charleston weather usually is just about perfect in May; (b) Spoleto, an international performing-arts festival, was scheduled to run from May 24 to June 8 and fill every hotel in town; © the Atlantic hurricane season starts June 1 and runs through November 30; (d) midweek hotel nights are cheaper than weekend nights; and (e) flying in on Sunday is easier and sometimes cheaper than flying on a weekday.
  - 2. A good source of city-specific information about the venue city (VC) is its Convention and Visitors Bureau (CVB). Find its web page by entering “[Venue City] Convention and Visitors Bureau” in the search box of any major search engine (Google, Yahoo, etc). Call or email the person listed for convention and group planning and ask if they have someone on the staff who specializes in military reunions. If so, call that person and ask

about local conditions and events that you need to take into account in selecting your reunion dates. He or she also should be able to give you information about support from local military bases, including contact information. Ask him or her to review your RFP and make suggestions before it goes out. This person can be enormously helpful, since he or she knows all of the players in the local convention industry and has helped with lots of military reunions. If they do not have a military specialist, then talk to someone who routinely helps with group planning.

- D. After the reunion dates are set, look around on the CVB web page for a place to **submit a Request for Proposal (RFP)**; there almost certainly is one there somewhere. Call someone if there are parts of the form that you are not sure about, then fill it out and submit it. Be sure to mention that you are doing a military reunion, that it will include a sit-down banquet dinner, and that you will need a hospitality room for the entire time with permission to serve alcohol there, and one meeting room at two different times (Board of Directors (BOD) and all-hands meetings). The CVB will shotgun it to hotels, tour operators, restaurants, and other vendors and you will start getting replies almost immediately. This saves an enormous amount of time and gets you started right away on hotel selection.
- E. **Local military support.** Contact the Public Affairs Officer (PAO) of nearby military facilities about any available support (tours, static displays, short-term PX and Class 6 passes, etc).
- F. Start thinking and talking to people about a **guest speaker**. It is not absolutely necessary that you have a speaker. A guest speaker is a little like the corpse at a funeral or the valedictorian at a graduation: necessary to validate the occasion but no one expects him or her to say anything really important.)
- G. **Hotel selection**
  - 1. **Review all of the proposals from hotels.** Eliminate those that

are obviously unsuitable: too expensive, too far away, too cheesy, no banquet facilities or capabilities, no dining room, no real lobby, no pool, no fitness center, not smoke-free, etc. Winnow the rest down to a handful of candidates for site visits.

2. Think about the things that you want to be sure to find out on the site visit and make up a **site visit checklist**. You likely will have gotten one in all of the stuff from the RSC that you can use as a starting point.
  3. Plan and perform your **hotel site visits**. You should be able to do all of them in two days. Mark the hotel locations on a city map and determine an efficient order in which to visit them. Each hotel proposal will include contact information for someone in group sales. Contact that person and set up a date and time for a site visit. Ask the person at a hotel near the middle of your planned visit route if the hotel might comp you a room for the night. When you get back home send a short thank you to your contacts at the visited hotels.
  4. **Select the venue hotel** and let your VH contact know right away via email. Let your contacts at the other hotels know that they were not selected and thank them again for the time they spent with you.
- H. Decide **how many rooms you want to reserve**, which is one of the *toughest decisions* you will have to make; it is fraught with uncertainty and risk. You risk reducing the quality of the reunion experience for the members if you **underestimate** the demand. If that happens and the hotel sells out then you will not be able to get any rooms above your original block and will have to arrange for an overflow block elsewhere. On the other hand, if you **overestimate** then you run the risk of the Association having to pay a penalty if it fails to meet the contract.
1. How do you decide? Find out about attendance at the past few reunions, look at the geographic distribution of our

membership relative to the VC, and consider any other information that you think pertinent. Then make your best SWAG and pull the trigger.

2. It probably is best to aim a little low with an eye toward adding rooms to the contract if demand seems to warrant doing so. Make a strong pitch in your communications to the membership for everyone to book their rooms early if they plan to attend, so that you can get an early idea about adding rooms before the hotel starts to become fully booked. It costs the member nothing to make a reservation and it is not an absolute commitment; it a risk-free option that can always be canceled.
3. If it starts to look like you need to add rooms to the contract, don't wait too long before you pull the trigger. (Chuck Johnson dithered one day too long in Charleston, the hotel booked another group that sold out the hotel, and he had to book an overflow block at another hotel.)

I. The VH will send you a **proposed contract**. Read the contract very carefully. It would be a very good idea to forward a copy of the proposed contract to each member of RSC, all of whom will have had to sign a similar contract in the past, and ask for comments. Be sure that the contract addresses the following issues:

1. Number of rooms blocked for each night, total room nights blocked, and expected total room revenue to the hotel
2. Facilities to be provided-- dates, and cost, if any, for banquet room, hospitality room, and meeting rooms
3. Attrition percentage, which is the percent of the expected total room revenue that must be achieved in order to keep the Association from having to pay for unbooked rooms
4. Reservation due date--unbooked rooms returned to inventory, attrition clause invoked, typically D minus four to six weeks



5. Cancellation fees if entire event is cancelled
6. Force majeure (acts of God)
7. Payment schedule
8. Concessions (rights and benefits from Hotel to Group)
  - a. Approval to bring outside food and beverages, both alcoholic and non-alcoholic, into the hospitality room
  - b. Complimentary internet in all rooms (and hospitality room, if feasible)
  - c. “Shoulder periods,” two or three nights before and after the reunion dates when members can get the reunion rate, subject to availability, for those who want to arrive early and/or stay longer. Those nights should count toward the contracted total room nights and total room revenue.
  - d. Try to get one free room-night per some number of room nights occupied . You will need a room for your speaker, if you have one, or you might just have it credited to the Association’s master account.
  - e. Try to get free ice and daily cleaning of the hospitality room in “Concessions” above. If they won’t go for that, then have them put it in the contract as a paid service with a specified price. Otherwise, it will be a daily chore that you will have to do or arrange to have done by volunteers. You will have plenty to do without that.
9. Insurance and indemnification–VC may will require a liability insurance policy, with copy furnished upon contract signing. Event insurance is quite inexpensive. (Coverage for HMM-265's Charleston reunion, including the serving of alcoholic

beverages ,was obtained from <http://www.theeventhelper.com> for less than \$140.)

10. Audio visual equipment availability and cost–Hotel price may be high so check local prices. (In Charleston HMM-265rented a large, flat-screen TV for showing looped videos from Aaron Rents for a tenth of the hotel’s price. We could have bought the TV for what the hotel wanted for four nights usage.)
- J. Hotel reservations. The VH will set up a **group ID** with its own web address for making reservations after the contract is signed. As soon as it is available send out an email **save-the-date** to the membership email list giving the city, dates, the name of the hotel, and the information on how to make reservations.
- K. Start working on the **schedule of activities**. If the VC was well chosen, then your problem won’t be thinking up things to do, it will be narrowing the selection from a huge variety of possibilities. You want to schedule fun, interesting things every day without over-filling the days. People want some time on their own and many of our members don’t have the mobility and stamina to do too much in a day.
  1. Start by going through the proposals that resulted from the RFP. If you need more, then search online and ask specific vendors that interest you to submit proposals. Contact those that look like a good fit for our group and work out specifics. Be sure to find out about accessibility for people with mobility issues. For example, is it wheelchair and scooter accessible? Can wheelchairs and scooters be carried on the busses? How much walking is involved?
  2. Select the activities you want to include and sign contracts with the vendors.
- L. **Entertainment**. Decide whether or not you want any kind of entertainment, find it, and contract for it.

M. **Arrange the banquet** if you mean to have one.

1. The most convenient location, by far, will be the venue hotel. Other places will be available, of course, perhaps some with great reputations. You will have to decide if the great reputation is worth dealing with the logistics and cost of getting people there and back. Remember, our members generally come to visit with each other and likely will not remember what or where they ate.
2. If using the hotel, then get with the catering manager and pick the menu. People really like having choices, so try to offer perhaps a beef, chicken, and seafood entree. Get a total, all-inclusive price for each choice, rather than using a blended price for all. People know that beef costs more than chicken and some chicken eaters will get all mule-lipped about subsidizing someone else's filet.
3. With menu choices there comes the inevitable problem, after everyone is seated, of letting the wait staff know who ordered what. See "Physical Preparations, Nametags" below for a good suggestion.

N. **Prepare and send out** the reunion information materials to the membership. These typically have consisted of a cover letter from the President and the RC, a schedule of at least the activities that the members will pay for, with a descriptive paragraph for each activity, and a registration form. The registration form should include menu options and prices for the banquet. This is your first and best shot at selling the reunion to the members, so use it well.

1. The cover letter should make a strong pitch for everyone to reserve rooms early, so the RC can get a supplementary block if needed.
2. Each vendor likely has already sent you something that you can use as a starting point for the event descriptions.

3. Include spaces on the registration form for making a contribution to the Association and for describing any mobility (wheelchair, scooter, etc) or dietary (vegetarian, vegan, low sodium, etc) issues. Again, you might start with the examples provided by prior RCs.

**R. Guest speaker or honored guest**

1. Send an invitation letter to your first choice of guest speaker. Use nice paper and envelope and put the Association's logo and your own address in the letterhead. Tell that person why you think he or she would be a good fit for the HMM-262's reunion. If you don't get a reply within a few weeks then send him or her a short note or email with a copy of the original letter attached, saying that you just want to make sure he or she received our invitation and reiterating how honored we would be to have him or her speak to or be with us.
2. If you get turned down, send a letter out right away to your second choice, etc. Keep at it until you get a speaker or start running out of time.
3. If you get a speaker then you need to be able to comp him or her a room. Most hotels will comp one room for each multiple of some number of paid rooms. See prior discussion of concessions in hotel contract.
4. Be thinking about a fallback position in case you can't get a speaker. You could get some kind of entertainment or perhaps an informational presentation. You also could just let people talk to each other and enjoy their dinners.

**S. Receiving registrations.**

1. Prepare the worksheet that you will use to record registrations so it will be ready when registrations start coming in. Your best bet is Microsoft Excel or an Excel-compatible product such as the free, open-source Libre Office and OpenOffice suites. You will want a column for each item of information

you want to collect. You also will want to build in a few cross-checks, such as making sure that the charges for the individual's chosen events add up to the amount of the check. Once again, the quickest way to do it would be to take a spreadsheet from a prior RC, erase the data (but not the formulas) and change column headings as needed. A little spreadsheet experience is nice to have, but not essential. Again, Chuck Johnson will be glad to help if you need it.

2. Open and record each day's registrations as they come in. That way you can catch errors and omissions and get them corrected as you go along.
  3. Batch the checks and make bank deposits as appropriate. Keep a copy of the deposit slip, including the list of checks, and attach the voucher from the cashier after the deposit has been made.
  4. You likely will get a slew of registrations in the first couple of weeks. These are the hard-core attendees; if they are still alive and reasonably mobile on D-day then they plan to be there. It will taper off pretty quickly, however. Most people procrastinate, particularly when it involves laying out several hundred bucks.
- T. Get periodic pickup reports from your contact at the VH showing how many rooms are booked to date.
1. Use these to start thinking about the need for a supplementary block of rooms. Make a reminder pitch to all hands asking everyone to please book rooms early, even if they don't want to send in the registration and payment right now, so that more rooms can be added, if needed, before the hotel fills up.
  2. **As D-day approaches**, put out an all-hands email every month or so to remind everyone that time marches on. It's easy, free, and likely will stir a few members to action.
- U. Physical Preparations

1. **Name tags.** The easiest way to do name tags is to work with someone at one of the large office supply stores (Office Depot, Staples, etc.). They have all of the supplies and also the ability to print name tags in various formats from a text file that you create. Get the file requirements from them before you start the file. The service is not expensive and saves untold aggravation.
2. Using nametags at the banquet. With menu choices there comes the inevitable problem, after everyone is seated, of letting the wait staff know who ordered what. One approach that works very well is to put a color-coded sticker on the back of every name tag holder. Remind everyone to wear, or at least bring, their name tags to the banquet, and place them face-down in front of themselves after they are seated. The office supply store that does the name tags will have inexpensive packets of stick-on dots in different colors. Email the code (red means beef, etc) to the catering manager beforehand so that he or she can pre-brief the wait staff. Both the catering manager and the wait staff will love it and everyone will be served more quickly.

## V. **Hospitality room**

1. Booze, wine, beer, soft drinks, and bottled water. Be conservative with pre-purchases. It's better to have to make a couple of runs to restock than to have a lot of excess to deal with at the end.
2. Mix and other bar supplies - tonic, club soda, tomato juice, corkscrew, olives, limes, lemons, sweet and dry vermouth, a couple of pitchers
3. Snacks (junk food) - chips, nuts, salsa, etc. Again, don't get too much up front; someone can always make resupply runs and you don't want a lot of that stuff left over.
4. Supplies - napkins, paper towels, cups, plates, utensils, knife for cutting lemons and limes, cutting board, shot glass, cocktail

shaker

5. Ask if hotel can furnish coolers. If not, ask local attendees or anyone driving to the VC to bring coolers; much easier that way.

**W. Post-Reunion Activities**

1. **Thank-you notes** as appropriate (speaker, hotel, others who helped a lot)
2. **Finances**
  - a. Make sure all checks have been deposited, all bills paid, and records updated
  - b. Write a check to the Association for the remaining balance and send it to the Association's treasurer along with the bank statements and a hard copy of all records related to cash management the treasurer wants them.
  - c. Destroy remaining checks and credit/debit cards
  - d. Close the account at the bank when the last check has cleared
3. **Other records.** Put paper files in folders and computer files on a labeled thumb drive, then put it all in a labeled box or large folder and stick it in a closet. In a year or so move it to the attic and forget about it. Your kids can deal with it after you die

III. **Terminology.** These terms appear throughout the document and the abbreviations are defined on first usage. They are pulled together here for ease of reference.

CVB	Convention and Visitors Bureau
D-day	Date reunion begins
PAO	Public Affairs Officer (military interface with the public)
RC	Reunion Coordinator

RFP	Request for proposal
SWAG	Scientific wild-ass guess
VC	Venue city, the city in which the reunion is to be held
VH	Venue hotel
WAG	Wild-ass guess