



Using HelmsBriscoe to Select Your CRC Venue

What is HelmsBriscoe?

- HelmsBriscoe streamlines the meeting planning process by managing the time-consuming task of researching, contacting and evaluating venues for your CRC.
- HelmsBriscoe sends the Request for Proposals (RFPs), tracks down the answers, follows-up with the hotels, and manages the entire site selection process on your behalf.
- Once contracted, the CRC is planned by the host chapter. HelmsBriscoe's only involvement post-contract is managing the hotel room block pick-up, communicating the reports with the General Chair and assisting with any contract related questions.



Benefits of Working with HelmsBriscoe

- Alleviates the time and complexities of finding the right venue.
- Navigates contract language to make sure the chapter is protected.
- Monitors the host chapters room pick-up to help mitigate any attrition issues that can be costly for the chapter.



Does it Cost ASHRAE to use the Service?

- HelmsBriscoe helps chapters overcome challenges by combining their collective expertise and buying power to gain insights and concessions into the broadest possible set of venues.
- Once HB identifies a venue that match your criteria, they negotiate rates and concessions and facilitate the contracting process. As a client, you receive the highest possible return on your meeting, all at no cost to the chapter or ASHRAE!
- HB receives a commission direct from the hotel based on actualized room pick up. HB adds a commission clause to all contracts that guarantees the rate not increased by the commission granted by the hotel.



Is it Required for the Host Chapter to use HelmsBriscoe?

- The service is optional for host chapters.
- If the chapter chooses to not use HB, the host chapter is responsible for their own contract review.



The Process

- HelmsBriscoe **should** be the first contact with the hotel.
- If you have entered conversations with a property, then HelmsBriscoe can only move forward with an “agent of record” letter from Host Chapter. HB can provide you with a sample of this letter.

STRATEGIZE	EVALUATE	NEGOTIATE	EXECUTE
<ul style="list-style-type: none">▪ Work with client to set meeting objectives, budget and requirements▪ Research client meeting history▪ Collaborate on RFP development to customize for client needs and priorities	<ul style="list-style-type: none">▪ Develop and submit RFPs based on client needs and priorities▪ Utilize HB resources to identify appropriate venues▪ Compile and organize hotel data to present to client▪ Evaluate offers from venues	<ul style="list-style-type: none">▪ Engage in negotiations with select venues▪ Research HB exclusive offers and promotions for client▪ Recommend strategies to reduce cost and minimize risk	<ul style="list-style-type: none">▪ Assist with hotel selection▪ Support the hotel contract process▪ Communicate client decision to venues▪ Provide problem resolution assistance and event follow-up
			

The Process

- **Fill Out the CRC New Meeting Request Form** - HB Contact: Susan Francois sfrancois@helmsbriscoe.com
- **Requirements** – The host chapter will provide all details needed in the Request Form including preferred dates, location, specifications, sleeping room requirements and history.
- **Research** – HelmsBriscoe will research sites using their database including over 300,000 venues.
- **Sending the RFP** – HB will summarize all requirements and submit the RFP to hotels on behalf of the host chapter.
- **Narrowing the decision** – The host chapter will narrow down the options based on RFP results. HB will set-up a site visit for the local general chair and host chapter, if needed.
- **Final Contender** – The host chapter selects an option and HB moves to the contract stage.
- **Negotiations** – HB negotiates on behalf of ASHRAE by scrutinizing pertinent clauses and making favorable changes. Additionally, HB will ask for special concessions based on the host chapter's needs (which could include comp Wi-Fi, reduction in F&B costs, etc). The chapter will receive a final copy to review and sign.
- **Your Hotel has been Selected** – The process is complete. The host chapter will now work independently with the hotel on all planning aspects including room assignments and set up, F&B orders, internet requirements, AV orders, etc.



The Process

Timeline:

- 12-18 months prior fill out the HB Meeting Request Form
- 12-18 months prior confirm location and sign a contract
- 6 months prior release and promote housing link
- 3 months prior send hotel specifications (room sets, F&B and AV orders)
- 2 months prior heavily promote housing link
- 1 month prior be sure all Banquet Event Orders are reviewed and approved



Beyond the Process

- The “[Meeting Request form](#)” is solely used to help HelmsBriscoe contract your space. The form is not intended to replace your specifications for the hotel used for planning your event. The host chapter will be responsible for planning all details once the event is contracted.
- For this process to be the most successful HelmsBriscoe must reach out to a given hotel on your behalf. HelmsBriscoe should not be brought in after conversations with the hotel and host chapter have started.
- The host committee should provide HelmsBriscoe with direction on where the event will be hosted.



Beyond the Process

- If you have already identified a venue and you plan to use HelmsBriscoe, be sure you are not working with the hotel directly until after the contract is signed.
- The minimum in your contract does not reflect the overall cost. The host chapter should review the hotel menus in advance and budget based on the latest costing information available. It is imperative that the chapter does not budget based on the F&B minimum since it may not be reflective of the Chapter's overall costs.

Beyond the Process

- The host chapter is responsible for the planning of the event.
- HB does not negotiate your AV or F&B orders.
- HB is only for assisting with:
 - The site search for the right hotel
 - The contracting phase of the project
 - The tracking of the hotel block



Questions

- If you have any questions related to the starting the process or during the process, please contact meetings@ashrae.org.
- The meetings team is more than happy to assist with questions and concerns.

Good luck with CRC planning! We are here to help!

