

COVID-19:

CHRONICLING THE
LESSONS LEARNED

in the Canadian Events Industry

September 2020



COVID-19: Chronicling the Lessons Learned in the Canadian Events Industry

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The COVID-19 Coronavirus in 2020 is the first global pandemic since the Spanish Flu of 1918.

At this writing on September 14, 2020, the total number of cases in the world stands at 29,114,477, with a death toll of 925,596. It brings a whole new meaning to something going viral...

In Canada in mid-March, 2020, the federal government called for non-essential workers to self-isolate, in a critical attempt to effectively slow down the spread of the virus – “flatten the curve” was the mantra that the health officials used. What ensued was a 3-month emergency shutdown of the Canadian economy (within the global economy shutdown), resulting in a major impact to businesses, the workforce, and peoples’ mental health.

This action was eventually effective in the initial wave of the virus. The Canadian Meetings and Events Industry was decimated. Initially, no more than 5 people could be together, and at this writing on September 14, 2020, only in some areas are up to 50 people able to congregate indoors – wearing masks and within social distancing measures of 2 metres/6 feet between individuals.

This report is meant to chronicle case stories from a small sampling of event planners from across Canada who had to deal with upcoming events that could not be held due to the restrictions caused by COVID-19. It also includes some observations, reflections and information that can perhaps be used to develop best practices for the future.

We are very thankful for all of the time and effort taken by all of our interviewees to provide us with their case stories. The professionalism, courage, intelligence and fortitude shown throughout their endeavours are exemplary.

Heather Reid ARCT, MSc
Founder & CEO
Planner Protect Inc.

Canadian Meetings &
Events Expo (CMEE)
Hall of Fame 2017:
Industry Innovator

Heidi Wilker B.Comm., CMP Emeritus
Retired Owner
Blessed Events

Canadian Meetings &
Expo (CMEE)
Hall of Fame 2020:
Industry Veteran

Overview of Participants and Process

Over the course of 36 Zoom interviews, conducted from April 15 – May 22, 2020, we spoke with a total of 38 event professionals.

We are sincerely and deeply grateful to our interviewees, who are listed below alphabetically by first name:

Andrea Boulden
Senior Manager, TD Bank

Anita Carlyle B.Comm., CMP, CMM
Managing Partner, MCC Events

Bobbi Hoffman CMP, CMM
Director of Operations/Meeting
Planner, The Bayley Group

Carly Silberstein DES, CED
CEO, Redstone Agency Inc.

Caroline Aston
Principal, Aston Events &
Communications

Chantal Montpetit CMP, CMM
Meetings Director,
Entrepreneurs' Organization

Chantel Beaupre
Co-Owner, Say Something
Communications Inc.

Chris Lutz
Partner/VP Program
Development, Verney
Conference Management

Claire Bélanger-Parker
President, CNT Management
Group Inc.

Constance Wrigley-Thomas CAE
Owner/CEO, Essentient
Association Management

Dustin Rivers
Partner, Verney Conference
Management

Harpreet Atwal Special Event
Management Diploma
Senior Events Coordinator,
Executive Platforms

Hélène Kenny CMP
Acting Senior Program Manager,
National Judicial Institute

Jamie Lamont
Director, Special Events &
Sponsorship, SickKids
Foundation

Jessica White CMP
Director of Operations, KCI
Management Inc.

Joe Orecchio
President, Road Ahead Meetings
& Events Inc.

Karen Norris CMP
Conference Manager, Canadian
Association of General Surgeons

Kate Kelly CMP, CMM
Queen Bee & Owner,
ConventionALL Management Inc.

Krista Benoit
President & CEO, iSPARK
Consulting Inc.

Lauren Stewart
Director, Conferences &
Operations, BookNet Canada

Leanne Calderwood CMP
VP Global Accounts,
ConferenceDirect

Lynda Hoff CMP, CMM
Manager, Membership
Education & Events, Ontario
Nurses' Association

Malak Sidky MHA, DES, HMCC
President, Health Care Event
Planning

Marie Lou Coupal CMP
Business Events Strategist,
Marie Lou Coupal & Associates

Marie Zimmerman PhD
Executive Director, Hillside
Festival

Melissa Cole
Co-Owner, Say Something
Communications Inc.

Michelle Planche CMP
President, Paradigm Events

Mireille Faucon
CEO & Principal Planner, Events
Par Excellence Inc.

Nikki Sayers CMP
Senior Program Planner, KCI
Management Inc.

Nowshad Ali CFRE, CPBA, CPVA
President & CEO, On Purpose
Leadership Inc.

Patricia Simpson
Manager, Marketing and Events,
Canadian Council of Motor
Transport Administrators

Pearleen Mofford CIS
Former Managing Director,
Downeast DMC

Rita Plaskett CMP, CMM, VEMM
President, Agendum Inc.

Ruth Abrahamson
CEO, Base Consulting and
Management Inc.

Stewart Hall
President, Rock the Stars

Sue Mercer
President, Step In Marketing &
Event Solutions

Tracy Scanks
Owner/Executive Director,
ProConference Advantage

Tuesday Johnson-MacDonald
CMP, CMM
Founder and President, TAP
Resources

36 Zoom
interviews

38 event
professionals

962 pages of
transcriptions

We provided the following 14 questions to the interviewees ahead of time:

1. Tell us about the event(s) that you want to discuss today, *i.e.*, *event name, event dates, # of anticipated attendees, location of event, etc.*?
2. At what point in your planning journey did you officially cancel or officially postpone your event, *i.e.*, *in the air, days before, nothing yet shipped, registration closed, etc.*?
3. When did you become aware that COVID-19 was potentially going to impact your event?
4. What steps did you take to start the conversation with your client/ employer to cancel or postpone, or did they come to you first?
5. Were you responsible for “leading the charge”? Were you a consultant to others? Did you have a voice in the process?
6. Was there a clear “chain of command” during this situation or was it established in the moment?
7. What were the key messages that you needed to communicate – and to whom were those key messages communicated? How did you decide what the key messages were?
8. Did you consult with outside experts such as a crisis communications expert or legal counsel?
9. Did you have a crisis communications plan for your event in place before COVID-19?
10. Describe the discussions that were had with your key stakeholders, *i.e.*, *attendees, venue, hotel, sponsors, third party suppliers (such as AV)*?
11. How did your various stakeholders respond to your communications and to your decisions?
12. What actual steps did you take to officially cancel/postpone your live event? Did you follow a cancellation plan? Was this plan pre-established or written in the moment? Please share the chronology of the cancellation steps.
13. Did you have a crisis plan for your event before COVID-19 to address other possible risks? When the time came to cancel/postpone, did you follow that plan – was it helpful, relevant, vague, complete?
14. What has been documented for post-pandemic discussions to assess and review the process and execution of this event cancellation or postponement?

.....
Did you
have a crisis
plan for your
event before
COVID-19?

We also asked 5 spontaneous questions, which evoked many profound and brilliant responses:

1. Do you think that you were sufficiently / properly trained for this kind of situation?
2. What did you learn about yourself, your teammates, your employer/client?
3. What do you think you did extremely well?
4. What do you think you could have done better?
5. If you had to provide advice to someone else that found themselves in this situation – what would you say?

Several of our interviewees told us that going through this process provided somewhat of a cathartic experience – reviewing what they had been through gave them a sense of accomplishment, pride and insight into themselves and their clients/employers.

The breakdown of planner types is as follows:

Corporate	2	Destination Management	3	Festival Management	1
Association	7	Company (DMC)	3	Other	5
Independent	15	Association Management		3 Agencies	
Site Selection	1	Company (AMC)	4	1 Charitable Foundation	
				1 Entertainment Provider	

The types of events covered international, national and provincial association conferences; corporate conferences; certification, training and leadership courses; special interest conferences focusing on volunteerism, academic research, and palliative care; Indigenous meetings; incentive events; awards galas; a major fundraising gala; and a summer outdoor festival.

Event locations included many cities across Canada, in several US states (Florida, western US, Illinois), and international cities in South Africa, China, and Australia.

27 events were outright cancelled; 11 were postponed (cancelled for the original date and shifted to a future date); some cancelled events were still in limbo as to setting a date.

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[Editors' note: Quotes from the interviewees are listed alphabetically by first name, in no particular order of significance.]

Our Favourite Question?

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If you had to provide advice to someone else that found themselves in this situation – what would you say?

WHOA – What Just Happened?

Being a coronavirus (one that had never happened before), COVID-19 was a difficult illness for experts to determine exactly how it was being spread, the depth of its affects on the body, and how deadly it would be. Starting out in Wuhan, China near the end of 2019, initially it was thought that it might remain a regional outbreak. When cases began to appear in other countries, primarily due to travellers who were infected, the seriousness of its spread and potential global effects became evident. The use of masks was thought not to be necessary at the beginning of its spread, but that thinking changed several months later, and the health experts have done a 180° change in making the wearing of masks mandatory in indoor public spaces, and where social distancing is not possible, in many areas. At this writing, the virus has shown some variants on its makeup, but has not mutated to a different form. Research on creating a vaccine is happening around the world.

Awareness to the seriousness of the virus by the planners interviewed ranged from the end of 2019, when the virus started in China to when the World Health Organization began to publicize its spread to other countries in January/February 2020, to when the Canadian federal government and provincial governments enacted travel bans and emergency directives for self-isolation in the middle of March 2020.

Some of those who were early adapters either learned through various connections about what was happening in China, or researched what the medical professionals were saying.

Anita Carlyle *B.Comm., CMP, CMM | Managing Partner, MCC Events*

“We actually were dealing with a company in Japan, so we were talking about it (COVID-19) within our company. I went to the SITE conference in Vancouver at the end of January. On the last day, I was flying back from Vancouver, and the connection flight I was on had flown over from Hong Kong, picking up people in Vancouver. There were some people that were to be on that flight that said ‘no, I want a direct flight, not a connector flight.’”

Caroline Aston *| Principal, Aston Events & Communications*

“I remember discussing this in January, and not fully understanding what was about to hit us. Well, you know, [they say] it’s just like the flu, how bad can it be? Then towards the end of February though, that’s when I was looking differently at what was happening.”

Chantel Beaupre | *Co-Owner, Say Something Communications Inc.*

Speaking about an international event scheduled to be held in Beijing, China, involving 2 international associations coming together composed of people from 65-70 countries, cancelled in January, 2020: “Some of the initial concerns were related to travel insurance; specifically, we started to hear from delegates whose organizations would not permit them to travel to China because of the virus, and who would not be covered by travel insurance if they opted to travel. So that’s what really got the conversation going for us in early January 2020.”

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

“In terms of my own journey and learning about COVID, it started as early as December. I have two sons who live on Reddit and in the Twitter world, and they had been watching COVID-19 since it started breaking out in Wuhan, China. They were sending me photos and content that we were not seeing anywhere in Canada and the US. When did I see it as being a threat to our event? Toward the end of January. What I was seeing around the world, what I had seen coming in December, was much bigger than we wanted it to be.”

Harpreet Atwal *Special Event Management Diploma* | *Senior Events Coordinator, Executive Platforms*

“When did we first realize that this was going to be an issue? For me personally, I think it was January, and the reason being it was Chinese New Year. A lot of people were speculating about the travelling and the return, so that’s when it first came up. We were watching how things were going. As every day passed, I think there was a little more concern every day.”

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

“I guess the benefits of working at a hospital are being privy to a lot of information that the hospital was dealing with. Early January, we were made aware of a potential situation that was being seen in other countries like China, Italy, and a few others, and that the very likelihood of it coming to Canada would be happening in the time frame that it did. Obviously, not understanding the full scale of that...”

“

When did I see it as being a threat to our event? Toward the end of January. What I was seeing around the world, what I had seen coming in December, was much bigger than we wanted it to be.

– Claire Bélanger-Parker

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“We learned early – you know why? First, the context of our exhibition included a large country pavilion from China. So obviously, in early February, the news from our friends in China was not good. We immediately started to plan for the negative impact of closed borders and visa restrictions. At that point, we did not realize that this was going to be anything other than just local.”

Marie Zimmerman PhD | Executive Director, Hillside Festival

“We had been paying attention to what was going on in China in January and February. Things started heating up in February when there was a soccer game in Europe between Italy and Spain. That is now regarded as a super spreader event. We started looking at that, and the fact that the World Health Organization (WHO), at the time, was talking about it as a potential communicable disease of international concern.”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“I had been monitoring COVID even late in the year, November, December, kind of seeing what was going on – it was quite evident at that point that something was going to impact us – maybe simply jurisdictionally, or travel restrictions, or a bit of a downturn in terms of attendance or their participation. Then by the beginning of March we knew this was going to impact us significantly.”

Ruth Abrahamson | CEO, Base Consulting and Management Inc.

“I started thinking about it in December. I am on the governance and nominating committees with the MacKenzie Health Foundation – not that they were giving advanced information to the whole world, but one is more attuned when you know already what’s been out there (SARS). Of course, I didn’t imagine the worldwide impact it would have – I don’t think anyone did.”

“I visited my son in France in the first week in February, and then I’d gone on to spend a few days in England. Already, I was listening and seeing things that were coming down – the changes in airport and travel protocol. When I came back, we did begin some preliminary discussions with our clients at that time. I think everyone thought I was scaremongering.”

“

We immediately started to plan for the negative impact of closed borders and visa restrictions.

– Marie Lou Coupal
CMP

Tracy Scanks | *Owner/Executive Director, ProConference Advantage*

“I remember coming back at the end of January from a Newfoundland trip and hearing about COVID for the first time. Since then, you just watched it often, but then it started to get very serious in March.”

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Planners were using a number of resources to become informed of what was happening. Listening to reliable news reports, checking the website of the World Health Organization (WHO), and researching the information coming from the Public Health Authorities in the region in which their event was happening were critical to keeping their awareness current.

Andrea Boulden | *Senior Manager, TD Bank*

“I think watching the news, not obsessively, but watching because the news impacts us more than ever. Now it’s part of the job requirement that you watch the news every day, because so much is changing.”

Caroline Aston | *Principal, Aston Events & Communications*

“I had discussions with Ontario Public Health about risk mitigation for events. I remember talking to this amazing woman at Public Health.”

Karen Norris CMP | *Conference Manager, Canadian Association of General Surgeons*

“I spoke with other medical meeting planners. I got tips about what they did – what helped them learn, what they got from provincial medical officials, etc.”

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

“(Our team) started to have daily meetings. I knew if we were having this kind of ongoing conversation, it would strip away the hysteria that was happening in other places. We could focus on what was the smartest, data-driven decision for the company. People would expect us to have all the data pointing to reliable sources, and not just cancelling based on industry fear.”

“We, as an organization, needed to trust what Toronto Public Health was saying, and that we would let the officials guide those decisions.”

“At one point, I had around 20 different tabs open (on my computer) that I was refreshing every hour just to see if there was a new brief from Toronto Public Health, on the World Health Organization (WHO) page, if the guidelines for mass gatherings had changed and what is a mass gathering.”

“

Now it’s part of the job requirement that you watch the news every day, because so much is changing.

— Andrea Boulden

Marie Zimmerman PhD | Executive Director, Hillside Festival

“I was reading academic work on pandemics, but also some articles that were being published by epidemiologists. It was Dr. Bruce Aylward, who’s an East Coast physician – he’s one of the leads with the World Health Organization (WHO). He was the one who actually articulated these three scenarios. That was very helpful for me to listen to him, to read what he had written and say, OK here’s somebody who knows about epidemiology, and who is capable of giving us a big picture prediction of what could happen.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“I’ve never been in as many conversations with Members of Parliament and Members of Legislative Assembly as I was in this case. We had several conversations with them on national issues, as well as local. Those conversations played an important role in how we rolled things out as well.”

Tuesday Johnson-MacDonald CMP, CMM | Founder and President, TAP Resources

“We have Public Health representatives in our Indigenous communities. Because I happen to know the person, I had a conversation with them. Then it was all factual information, not opinion.”

“

We have Public Health representatives in our Indigenous communities. Because I happen to know the person, I had a conversation with them. Then it was all factual information, not opinion.

— Tuesday Johnson-MacDonald
CMP, CMM

To Cancel or Postpone, That is The Question

One of the biggest challenges that planners encountered was the cancellation process. Utilizing strategies during the cancellation or postponement of events was key.

There were methodical and tactical approaches, utilizing spreadsheets, and creating various scenarios:

Anita Carlyle *B.Comm., CMP, CMM | Managing Partner, MCC Events*

“My lead planner has a huge document on Google Docs that is a master tracker. It has the client’s name, contract, cancellation clause, Force Majeure clause, and what is the penalty if there is a cancellation.”

Carly Silberstein *DES, CED | CEO, Redstone Agency Inc.*

“We started a folder on our internal server where we were collecting resources, templates and communications – a repository of different types of resources and communications.”

Chantal Montpetit *CMP, CMM | Meetings, Director, Entrepreneurs’ Organization*

“Our VP started to work on a matrix for cancellation. With our legal team, they started to evaluate the contracts and look at what could we cancel, what will be the cost of cancelling. They presented to the Board, so they knew from the beginning how much it will cost if we cancel a month, six weeks, four weeks in advance, etc. What we also had to think of is that our members pay for their own rooms. Being at an international destination, they often will take the full payment one month out. That was the kind of breaking points we were thinking about – when they will charge, if some have been charged, can they be reimbursed?”

Claire Bélanger-Parker *| President, CNT Management Group Inc.*

“There is a lot of homework that prepared me for this. One of the crucial pieces was our risk management plan. I had to look at the risks of the pandemic, understand the risks impacting our association having to deal with the postponement of the AGM, election of new directors, refunds and so on. It was a 360 degrees analysis of the association. These are the steps I took to prepare myself, my executive committee and the board so we could make educated decisions.”

Claire Bélanger-Parker (cont'd)

“When you are responsible for an association, your responsibility is to your Board. You must do your research, use reliable data and share it with your leadership team so that, with you, they can prepare a well-educated response and take adequate actions to move forward.”

“My first step was to gather every important document related to my event, to have the information at the tip of my fingers - how much had been paid in deposits, how much was outstanding, what were the cancellation policies and when could we activate Force Majeure.”

“Secondly, I communicated my findings to my Executive committee so they could be prepared for the Board meeting. Thirdly, we informed the Board of Directors so that we could move forward and inform the membership at large that we were postponing the conference. Fourth and final step was to reach out to all our suppliers and inform them the event was postponed.”

Constance Wrigley-Thomas CAE | Owner/CEO, Essentient Association Management

“I don't want to just bring the problem and lay it at the feet of my president, my board. I like to come with the problem, but also some solutions. There are two solutions – one is postponed, and one is cancelled. Before I do that though, I need to get as much information as I can, to help them make an informed decision.”

Hélène Kenny CMP | Acting Senior Program Manager, National Judicial Institute

“The cancellation chart is to start to document all the data and what that looks like. We've pre-populated it with each contract and each program, what the cancellations and penalties are, and optimize it. The Program Manager cancels the audio visual and simultaneous interpretation contracts, and any travel for those that we've arranged their travel. The counsel lawyers cancel the faculty (speakers).”

“One team member was designated as the procurement specialist and worked with the site selection company with whom we regularly work – those two people have the big picture of what has been cancelled and what is being re-booked, taking into consideration when and where for the future.”

Jamie Lamont | Director, Special Events & Sponsorship, SickKids Foundation

“Working with our major partner in the event, it was a joint decision by both parties to postpone. We took a very slow and methodical approach to get there.”

“

Working with our major partner in the event, it was a joint decision by both parties to postpone. We took a very slow and methodical approach to get there.

– Jamie Lamont

Joe Orecchio | *President, Road Ahead Meetings & Events Inc.*

“Moving forward, every piece of business needs to have a full cancellation plan – this will help the client determine how to go about cancelling their program, should that be necessary.”

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

“One of our first steps was to put up a page on our website that talked specifically about what would change due to COVID-19.”

“Our CEO made it very clear, to protect our team, he would make the decision, and that way, we wouldn’t have to be distracted by the weight of that. He would take that on, so that we could just keep on doing what we were doing – planning for both executing the event, and cancelling the event.”

“We had set a deadline to make a decision to cancel before the first flight for a speaker was scheduled.”

Lynda Hoff CMP, CMM | *Manager, Membership Education & Events, Ontario Nurses’ Association*

“The one thing that I did want to make sure I did with everyone was connect with them by telephone first. I wanted to make sure that our hotel partner was fully informed of what our decision-making processes were. Once the government decided that those large gatherings couldn’t happen, then it was OK. So now it turned into do we postpone or do we cancel outright? From the keynote speaker, the event app, the registration system, all of those things needed to fall into place, and they had to be contacted. Personally, I just felt that was my job to do.”

“Then it’s looking at the language that we have in our contracts. What does that look like? How do we postpone without necessarily cancelling? Because of the space requirements, we already have contracts in place for the next 10 years (at the same hotel), so what does that look like? I added two additional years, in good faith with the property. We wanted to make sure that I got to them (virtually) in person to have that conversation, because that, to me, is the only way to do business.”

“

Moving forward, every piece of business needs to have a full cancellation plan – this will help the client determine how to go about cancelling their program, should that be necessary.

– Joe Orecchio

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“Our leadership reached out at that time to industry experts, key business leaders, etc. We have a global view on things so we wanted to have that global view and learn about the decision of postponing versus cancelling.”

“We started to review all contracts with the client, then we reached out to the insurance company.”

“What did we see as being a priority 1, 2, 3, and we went through a loose timeline, so that we could support the client and catch what they may have missed, or what we felt was important. So, a detailed scenario and what I call cadence was developed with the client.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“We started bringing processes to the table (with our client). The very first part was considering the decision, then it was making the decision, then communicating the decision, then executing the decision.”

“The Federal Public Health Department had come up with a tool that they put on their website that said if you have people coming to a meeting, and there are healthcare professionals, you should probably consider...if you have people who have been visited, you should...there had to be about five or six criteria. We took that and created a matrix, and added a number of other criteria. We used that to help us as a process to decide whether it should be postponed or cancelled, and how we would execute that decision.”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“I was charged with making sure that there was a project plan, a critical path, or multiple critical paths developed to determine – if we do cancel, what does this mean? If we look at postponing for a year, what does that plan look like?”



The very first part was considering the decision, then it was making the decision, then communicating the decision, then executing the decision.

— Nowshad Ali
CFRE, CPBA, CPVA

Some planners had to deal with optics and its affect on when to cancel an event. These optics brought their own challenge if the timing was not within the Force Majeure in the contract.

Caroline Aston | *Principal, Aston Events & Communications*

“They (the client) were under tremendous pressure from their members and member organizations to cancel. They couldn’t because they were hanging on for the government to come up with the regulation so that we could invoke impossibility. Their members were starting to cancel their registrations, and speakers were dropping out. I would imagine in their sector, there was some talk about ‘Why haven’t they cancelled this conference?’ That was the most difficult thing for them, because they knew they needed to cancel, that they weren’t really being fair to their members, but we were still just waiting and waiting for that announcement.”

Chantal Montpetit *CMP, CMM* | *Meetings, Director, Entrepreneurs’ Organization*

“There were no cases at all of COVID at that point (in Australia), then overnight, they had approximately 12 deaths and 200 cases. That was kind of the breaking point for our management to make the decision that we cannot send staff and volunteers there. We need to be responsible.”



Navigating the existing contracts in regards to cancellation clauses and Force Majeure clauses. Managing the financial liabilities that could result if the timing of the cancellation or postponement of the event did not fall at just the right time – was critical.

Andrea Boulden | *Senior Manager, TD Bank*

“I would have hated to have made that call because by that first week of March, it still wasn’t clear at that point that it would be as bad as it was, but we were worried. I remember that there was nothing going on in Washington, DC that week. I could see if it (our event) was in Asia, but it was in Washington, DC and there were no cases in Washington, DC at that time. So, I would have felt uncomfortable making that call, because I wouldn’t have wanted to seem alarmist. Also, the hotel was saying you’re fully liable for the cancellation because there was no reason not to do that.”



Their members were starting to cancel their registrations, and speakers were dropping out.

– Caroline Aston

Constance Wrigley-Thomas CAE | Owner/CEO, Essentient Association Management

“I contacted the hotel probably a full month and a half prior to the actual date of the event. At that point in time, the pandemic had not been declared yet – there were no emergency measures or anything like that. I was going in fully understanding that if we were to postpone or cancel, there would be financial penalties. I was able to do an assessment of what the damage might be. We made the decision knowing that the financial penalties could still be substantial. We decided it was in the best interest of the organization, as well as the attendees that we should postpone it. Once the pandemic was declared and because of Force Majeure, they would not assess any damages or penalties.”

Krista Benoit | President & CEO, iSPARK Consulting Inc.

“The decision was actually forced upon us by the government of Alberta, because they banned mass gatherings of more than 250 people. That was what we were waiting for, to be quite honest. We had legal counsel consultation; we had re-examined our Force Majeure clauses; we were, with the association’s financial officer involved, doing a risk assessment on the financial fallout from this event if it didn’t take place. We really needed somebody else to make the decision for us.”

Marie Zimmerman PhD | Executive Director, Hillside Festival

“We were exposed in terms of artists’ contracts, hotel contracts, and contracts with technical support and several other suppliers. It was enough that it could lead to insolvency.”

Michelle Planche CMP | President, Paradigm Events

“I said to my client – you just need to relax. If it’s a week or two and it (the pandemic) continues, they (the hotel) will have no choice, they will not be able to hold our event. It turned out, that’s what happened – we waited another two weeks and now we have zero cancellation fees.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“We did reflect on if we had made the decision to cancel at the very first date that they considered cancellation, versus the date that they made the decision, confirmed the decision, and communicated it. The difference in the financial impact was about \$58,000.”

“

We were exposed in terms of artists’ contracts, hotel contracts, and contracts with technical support and several other suppliers. It was enough that it could lead to insolvency.

– Marie Zimmerman
PhD

Patricia Simpson | *Manager, Marketing and Events, Canadian Council of Motor Transport Administrators*

“I’m in tune with our contracts related to our events – the fine print, dates and the things that are going to be impacted. I took a collective, holistic approach, looking at it from all angles, and how it was impacting us.”

Rita Plaskett *CMP, CMM, VEMM* | *President, Agendum Inc.*

“I was looking at the contract for cancellations and when the next deposit was due. I was able to get them (the hotel) to defer that payment, so I didn’t lose my client’s money to make that next deposit. I said, I’m not cancelling at this point, because we don’t know where this is going.”

Ruth Abrahamson | *CEO, Base Consulting and Management Inc.*

“We have an event in September, and there’s a 60-day clause. We have to wait it out. You have to be very, very careful with your timing.”

.....

The majority of our interviewees’ events were cancelled within Force Majeure criteria:

- inter-provincial and international travel bans;
- restriction on number of people that could gather;
- impossibility due to the nature of the attendees (front-line workers and those within the medical field);
- the event was being held in a venue within a Canadian National Park, and all national parks had been closed by the Federal Government;
- international travellers could not get travel insurance that would cover COVID-19

For the most part, the events industry suppliers (venues, AV companies, etc.) were quick to agree to the Force Majeure conditions without any penalties or financial damages being charged. The mantra that “we are all in this together” rang very true in this regard.

.....

A few planners had to deal with cancelling an event when official restrictions were not yet in place, but it was not a responsible thing to do to hold the event.

Andrea Boulden | *Senior Manager, TD Bank*

“In the beginning of March, we got communications from the Global HR department that all non-essential travel had to be cancelled. The Chief Medical Officer (within TD Bank) was involved, and everyone was looking at risk.”

.....
A few planners had to deal with cancelling an event when official restrictions were not yet in place, but it was not a responsible thing to do to hold the event.
.....

Malak Sidky MHA, DES, HMCC | President, Health Care Event Planning

“I was flying down (to the event in Orlando, Florida) when I received a text from my client letting me know that he had taken the decision to cancel following the WHO declaration that COVID-19 was now a pandemic, that it just didn’t seem like a good time to have the event. One of the delegates had contracted COVID-19, and they were in the same office as other delegates. Several other delegates and sponsors had emailed wondering if the event was being cancelled, since they weren’t comfortable attending, and it wasn’t safe to hold the event.”

“The hotel was not happy that the cancellation was happening at the last minute. Two weeks later, the client received an invoice for 100% of the cost.”

[Editors’ note: this situation was eventually resolved about 90 days later.]

Pearleen Mofford CIS | Former Managing Director, Downeast DMC

“An event scheduled for June 30th, was cancelled on March 30th, even though at the time, there was nothing to indicate that June wasn’t going to be possible. At the time, they were looking at a two-to-three-week window in Nova Scotia. So, there was no Force Majeure that could be leveraged because at that time, June wasn’t impacted. So now we are going back and forth, because June is impacted. There’s no precedent here to say, ‘Well, you can’t enjoy the benefits of what’s happening now. You would have had to wait until now to cancel.”

“Right now (May 7th), we have nothing stating that we can’t gather in June.”

“I don’t think that in the early days that both provincial governments and the federal government understood the implications of the fact they weren’t doing things in tandem.”



The pandemic situation brought to light the importance of strong and legally binding Force Majeure clauses.

Some of the contracts with which the interviewees were dealing had reference to government restrictions, impossibility factors of holding the event, or frustration of purpose within the Force Majeure clause. They were able to cancel their clients’ or organization’s events successfully.



I don’t think that in the early days that both provincial governments and the federal government understood the implications of the fact that they weren’t doing things in tandem.

— Pearleen Mofford
CIS

Some planners had stronger Force Majeure clauses than others.

Chantal Montpetit CMP, CMM | Meetings, Director, Entrepreneurs' Organization

"We knew that because the Force Majeure clause is very good – it's not too detailed but detailed enough – that we would be out of it."

Melissa Cole | Co-Owner, Say Something Communications Inc.

"We had a super solid Force Majeure clause that spoke not only to criteria, but to process and time lines. That Force Majeure clause was essentially our road map, because it did contain process, time lines, and remedy. It was really super and quite clear. What was step one, step two, step three, step four – awesome!"



Some planners were not so lucky, and had less clarity in the Force Majeure clauses.

Krista Benoit | President & CEO, iSPARK Consulting Inc.

"We did get a legal opinion on Force Majeure. Many of these clauses were kind of vague – they say 'emergency'. Well, what is an emergency? Who decides what is an emergency or not an emergency? If a government authority or public health prevents you from hosting your event, it's clearly going to be Force Majeure. There should be no debate."



Even if the timing in relation to when the pandemic declaration and/or government emergency measures were put in place, enacting Force Majeure was not always an easy task. Sometimes there were complications and challenges.

Caroline Aston | Principal, Aston Events & Communications

"The hotel's first response was to come back with an amended contract that postponed the event to 2021 and close to \$100,000 in liability for the client. After discussions between the client's and the hotel's legal parties, the hotel has taken the right approach. The contract has been terminated, and the deposit has been returned to the client. It worked out in the end, but it was interesting to see that first position (from the hotel) – they didn't want to admit to Force Majeure."



We did get a legal opinion on Force Majeure. Many of these clauses were kind of vague – they say 'emergency'. Well, what is an emergency? Who decides what is an emergency or not an emergency?

– Krista Benoit

Nikki Sayers CMP | Senior Program Planner, KCI Management Inc.

“We were waiting to see what was happening with the local government, and what was going on with the state (Florida). We did an assessment of how much it would cost to get out of the contract, then we proceeded forward with cancelling. We contacted the hotel, and this property was very tough, keeping to the contract and all of the cancellation fees. We did try to look for something in 2021, but nothing was viable – that’s why we pulled out of the contract. We weren’t sure if the Force Majeure would cover this kind of cancellation. What we did was pull out via the frustration clause. The hotel came back and said we’ll meet you at 65% in the cancellation fees.”



Here are some of the transcriptions of ‘Force Majeure’, interpreted by Otter (an AI transcription app) that we used:

horse manure	for special	last measure
harsh measure	more mature	first measure
horsemen sure	plus measure	for some sure
our machar	forest Missouri	fox measure
customers or	force for sure	for some measure
for sure	fourth measure	force mature
jar	for mother	forced mature
last month or	false measure	enforced measure
workforce major	forced me sure	<i>and the most</i>
false mage RS	for us measure	<i>popular ...</i>
for smudger	forced merger	force measure
fosse metro	foreclosure	



Due to governments’ emergency declarations invoking self-isolation, sales offices in hotels and venues were shut down. MANY employees in these businesses were either let go, or put on furlough. This made it very difficult for planners who were trying to either cancel or postpone events to connect with someone to do so.

Anita Carlyle B.Comm., CMP, CMM | Managing Partner, MCC Events

“Unfortunately, the hotel actually closed on March 17, with absolutely no communication. I do find it very strange for a large Toronto, major hotel to have no communication. Also, the event centre is also closed with absolutely no communication, so we can’t close the loop on some of them.”

.....
Interesting AI Interpretations of ‘Force Majeure’!
horse manure
for smudger
for some sure
.....

Bobbi Hoffman CMP, CMM | *Director of Operations/Meeting Planner, The Bayley Group*

"I know both the (hotel) sales person and the catering manager – who actually ended up being the only person working at the time, since so many people had been let go temporarily. So, I went to him; he went directly to the sales person, and boom...it was literally done within three days."

Lynda Hoff CMP, CMM | *Manager, Membership Education & Events, Ontario Nurses' Association*

"A lot of our partners were furloughed. So, it was tricky to get in touch with anyone. There were occasions when we had to keep trying to get in touch with them to make sure that we had all of our ducks in a row."

Mireille Faucon | *CEO & Principal Planner, Events Par Excellence Inc.*

"From mid-to-end of March, I lost all my contacts at all the venues I was working with. One in particular, I received an email at the end of the day on a Friday from my CSM saying 'I've been let go'. I was left hanging as a planner. Then I went to the sales person that I had been working with. I got the same message from her, that she was let go. It actually took me a while to get in touch with someone."

Nikki Sayers CMP | *Senior Program Planner, KCI Management Inc.*

"Although I had been dealing with the CSM, when you're trying to cancel a contract, some of the sale people that were originally doing the contract came back in to help negotiate that part of the contract. But because they were starting to get furloughed, we had some instances where we had two or three different sales people and had to re-explain everything again."

Tracy Scanks | *Owner/Executive Director, ProConference Advantage*

"Now, if you call a hotel, you're not getting anyone in sales. Nope. You're now dealing with a district manager. All of your sales managers, your normal contacts, are not even working. So that's the tough part, because they don't even know your story. Then you're going to the top and pleading your case."



“

From mid-to-end of March, I lost all my contacts at all the venues I was working with.

– Mireille Faucon

There were planners for whom the postponement of events was an option.

Some planners were fortunate to be able to do this easily. Others faced challenges that resembled a jigsaw puzzle, or a game of hopscotch! Some had to deal with a change in the organization's governance to be able to shift the event, or the profitability of future events in smaller cities, or consider educational credits/certifications. Some were able to provide some form of the 2020 event virtually, and postpone other portions of the event.

All postponements had to consider how to deal with deposits already made, refunding or shifting delegates' registration fees, etc.

Carly Silberstein DES, CED | CEO, Redstone Agency Inc.

"The event was supposed to be in April. The client rescheduled to the first week in September. They've now decided to reschedule to 2021. That's the only one right now that we've had to reschedule twice already, so that one is unique."

"Another international event happens once every three or four years, and it's never been held outside of Asia until, of course, this year. That's a fun one because the one that was supposed to be after 2020 was in 2024. But Taiwan had already secured it. We're in the conversations right now whether Toronto, Canada can take back the 2024 date. But then for a venue, we need their flexibility, but I'm also thinking from a business perspective, the venue needs to know their deferred revenue, so asking for something to be deferred from 2020 to 2024 is a stretch by any sense of the term."

Caroline Aston | Principal, Aston Events & Communications

"Now, if you postpone to the fall, it's not that simple. Planning of these events takes nine to ten months. How does that impact the sponsorship? How does that impact the exhibitors? Then you have to do the number crunching on the budgets. So, this particular client will be cancelling and then converting the continuing education for the doctors to virtual, because the doctors need 20 hours before the end of their education year."

“

Now, if you postpone to the fall, it's not that simple. Planning of these events takes nine to ten months. How does that impact the sponsorship? How does that impact the exhibitors?

— Caroline Aston

Chantal Montpetit CMP, CMM | Meetings, Director, Entrepreneurs' Organization

"It's very, very complicated. What we are trying to do is move the 2020 event to 2022. But because, of course, everybody that was in 2020 wants to move into 2021. They have high demand, so what we decided to do to help them is to move ours to 2022 and keep the 2021 destination that we've already decided on."

Claire Bélanger-Parker | President, CNT Management Group Inc.

"The key for us was not to cancel. It is a very competitive industry and every year, the company owners come together as friends. It is an important conference for our association and we knew that it is just a question of time before we meet again. Our challenge was deciding when we should plan to host again. We have a commitment for 2021 in eastern Canada. We then agreed to look at rescheduling Vancouver in 2022 so we could honour suppliers in both locations."

Constance Wrigley-Thomas CAE | Owner/CEO, Essentient Association Management

"We've postponed the event to November, 2020. We've been looking at 'can we take this virtual'? If we can, how can we do it to make sure that the attendees are still getting the full value, the full experience of attending that event as if they were doing it in person, and how does it affect the awards portion of the event? I'm starting to wonder if that event is achievable."

Harpreet Atwal Special Event Management Diploma | Senior Events Coordinator, Executive Platforms

"We took the direction of postponing because the conferences that we produce are annual, and we do have quite a high return rate of attendees. They also return with their colleagues because of the education portion and the organic networking that we allow them to have throughout the two days. We are hoping that the world levels out by September onwards, so ideally, that is when we will recommence all the events that we have scheduled."

Jamie Lamont | Director, Special Events & Sponsorship, SickKids Foundation

"The venue was very good at working with us to figure out what the best possible scenario would be for all parties involved. In their contract was the ability to postpone an event and to rebook it within the calendar year, or within the next 12 months. We came back to them and said, 'Could we do it in April, 2021, when we're hopefully very far and well clear of all of this?', and they were good with that."

“

If we can, (take this virtual), how can we do it to make sure that the attendees are still getting the full value, the full experience of attending that event as if they were doing it in person.

— Constance Wrigley-Thomas
CAE

Krista Benoit | *President & CEO, iSPARK Consulting Inc.*

“We had selected host cities, and we had host partners for 2020, 2021, 2022 and 2023. Host partners invest in the event because they want to attract sport events to their community. The first thing was ‘Can we somehow still host this event in Edmonton? Can we explore that it’s really a postponement?’ We have dates for 2021 in Ottawa with Ottawa Tourism as a partner. We have dates in 2022 in Richmond with Richmond Tourism. We have dates in 2023 in Winnipeg with Tourism Winnipeg as a partner. We’ve talked with everybody and they are all willing, in the best interest of the industry, to adjust and be flexible.”

Leanne Calderwood CMP | *VP Global Accounts, ConferenceDirect*

“This Canadian association client was to meet in Saskatoon. They were not able to put the event back into the calendar year of 2020. The other option available to the client was to put Saskatoon back into their rotation. What we are doing is moving some of their subsequent conferences into later years. We did want to preserve the integrity and the bylaws of having an event in western Canada in their rotation. We have successfully moved this 2020 conference into 2022, which is the best that we could do.”

Lynda Hoff CMP, CMM | *Manager, Membership Education & Events, Ontario Nurses’ Association*

“This particular meeting, because of the space requirement that we need, is in Toronto every year, at the same property. We cancelled this year, and we’re moving our speakers and education pieces to next year’s curriculum. In good faith, I added two additional years with the property, so we know that until 2027, this is where the meeting is going to be.”

Patricia Simpson | *Manager, Marketing and Events, Canadian Council of Motor Transport Administrators*

“Our organization is in a bit of a unique situation. We tend to book our conferences, our annual meeting, four to five years in advance. We also have a very different approach in terms of where or how the meetings take place. It’s written into our bylaws as an incorporated non-profit. There’s a specific rotational schedule written into our bylaws, because our members are jurisdictions across Canada – we give everyone equal weight, and they all have an opportunity to host in their province or territory. So, knowing that PEI was not going to get that opportunity opened up a governance piece that hadn’t been anticipated. It wasn’t simply that this meeting isn’t taking place – there’s the governance piece around what does that mean for them?”

“

It wasn’t simply that this meeting isn’t taking place – there’s the governance piece around what does that mean for them?

– Patricia Simpson

Patricia Simpson (cont'd)

What are the implications. We'd already booked four to five years in advance. Now, I'm looking at whether we are bypassing, or are we lifting and shifting everything ahead by a year? It really opened up a can of worms!"

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Those planners who had to deal with refunding didn't always have an easy task.

Constance Wrigley-Thomas CAE | Owner/CEO, Essentient Association Management

"What we didn't anticipate was the platform that we use for our association management system that sells registrations and memberships created a bottleneck in processing refunds. It sent up red flags, identifying security issues, so it didn't refund all the money right away. We had to file all kinds of paperwork to demonstrate that the request was legitimate. I'm happy that the payment processing system has these checks and balances, but it did create a bit of an administrative frustration for us."

Kate Kelly CMP, CMM | Queen Bee & Owner, ConventionALL Management Inc.

"We are still doing six figures of refunding, and only so many a day are allowed. They want you to show proof that you have the money in your account. It's taking forever! People are starting to get impatient."

Marie Zimmerman PhD | Executive Director, Hillside Festival

"You have to have all of the infrastructure for refunds and transfers to next year in place. That takes time, because you have to work with your ticket provider, their platform, and the peculiarities of their platform. We discovered that we couldn't say it was cancelled or postponed, because that language on our ticketing platform triggered an automatic refund. We didn't want that, because we knew that the people who had bought their tickets early probably wanted to just transfer it to next year. So, we had to call it rescheduling. That allowed them to make the decision about what they were going to do – transfer, refund, or donate."

“

We are still doing six figures of refunding, and only so many a day are allowed.

– Kate Kelly
CMP, CMM

What Did You Say? – Communicating To All Involved

In this pandemic situation, none of the planners or clients consulted a crisis communications expert. This was due to a lack of time in the moment, lack of time to onboard and educate them about the audience, and planners/clients already knew the appropriate vernacular of their attendees.

The majority of our interviewees did not have a crisis communications plan, and those who had something in place did not have one that necessarily addressed a pandemic.

However, many were able to describe the process by which they handled the crisis communications.

Carly Silberstein *DES, CED | CEO, Redstone Agency Inc.*

“We started a repository of different types of resources and communications on the 12th of March, so I think we communicated pretty early on.”

Harpreet Atwal *Special Event Management Diploma | Senior Events Coordinator, Executive Platforms*

“Our templates are built in-house. What they did was take that first template, and then tailor it to the new information, and plug and play. As planners, we know that templates are true life savers.”

Lauren Stewart *Director, Conferences & Operations, BookNet Canada*

“The previous year, we had brought in a crisis consultant as a speaker. She gave an amazing session and we took lots of notes. Our marketing team had really taken a lot of the crisis communication information to heart – how to treat various stakeholders, how to pivot very easily in terms of communication, and just be ready.”

Patricia Simpson *Manager, Marketing and Events, Canadian Council of Motor Transport Administrators*

“We had to develop a critical path on communications. It’s a different approach when you’re communicating with your vendors, your suppliers, anyone that you might be interacting with for an event. You had to take that list and say ‘are you communicating this message, or that message, or is it a combination of something else?’.”

“We had specific messaging around attendees, cancellation refunds, sponsors, exhibitors, those who had made direct call-in hotel reservations, those for whom we had provided a rooming list for hotel reservations, travel, etc.”

Ruth Abrahamson | *CEO, Base Consulting and Management Inc.*

“We scripted and developed talking points, so that everybody was consistent. We talked, first and foremost, about the health and safety of everyone, including our team. Secondly, we talked about government restrictions and regulations.”

Sue Mercer | *President, Step In Marketing & Event Solutions*

“I naturally have to-do lists. It was important to plan who do I have to communicate with and in what order. So, day one was members, day two sponsors, day three was on-site, etc.”



‘Communication is key’ – we heard this is the cornerstone to doing business well. In this unprecedented crisis situation, communication became even more important. It wasn’t just what was being said, it had everything to do with timing, tone, proper wording in regards to legal implications, and making sure everyone was informed.

Caroline Aston | *Principal, Aston Events & Communications*

“The key messaging to attendees and to sponsors was very similar – we’re monitoring the situation; the health and safety of everybody is the most important thing.”

Marie Lou Coupal CMP | *Business Events Strategist, Marie Lou Coupal & Associates*

“A main message was developed with the client, so that we were all speaking with the same voice – that we were following all health and local regulations to keep everyone safe and healthy.”

Rita Plaskett CMP, CMM, VEMM | *President, Agendum Inc.*

“The most important messaging, obviously, has to be the safety and care of the participants in the event. That had to be the most important thing that people could say.”

Tracy Scanks | *Owner/Executive Director, ProConference Advantage*

“Our audience was lawyers, who want fact-based communication. So, number one, the cancellation was for the health and safety of our members.”



The most important messaging, obviously, has to be the safety and care of the participants in the event. That had to be the most important thing that people could say.

— Rita Plaskett
CMP, CMM, VEMM

Some planners found themselves in a precarious position regarding Force Majeure negotiations with venues or supplier/partners, due to client constituencies communicating a cancellation or postponement prior to the venue or supplier partners being informed by the planner.

Caroline Aston | Principal, Aston Events & Communications

“Here’s an interesting learning – when we told the exhibitors that the show had been postponed, because they needed to cancel their orders, the company providing show services received all the cancellations. As a result, I received a massive bill from the show services company saying, ‘You’ve cancelled your show, your client has signed the contract, and we want 50% of the fee’. Even though we told show services it was postponed, what they were hearing from exhibitors was that the program was cancelled. You have to think about where all of the communications are going and how it’s going to circle back again. I quickly got in touch with show services to say it’s not cancelled, it’s postponed, at which point they said, ‘OK, that’s fine’, and retracted the 50% invoice.”

Chantal Montpetit CMP, CMM | Meetings, Director, Entrepreneurs’ Organization

“Communications all came from the marketing department. They originally planned to send it (the communications) to all tier one leaders and then to different levels. But you know how word spreads through rumours and social media – it just went viral, and then everybody was asking questions. They decided instead of doing it by level, they sent it to all of them saying it was cancelled.”

“I sent the communication to the suppliers to make them aware because we knew that some of our local members will also tell our suppliers – they’re well connected and know each other. I said ‘I’ll get back to you with the details next week when I know more’ – not saying we’re cancelling or we are applying Force Majeure or anything like that, to be legally covered.”

Karen Norris CMP | Conference Manager, Canadian Association of General Surgeons

“We were in a precarious position because we had not announced the cancellation yet, but it was the worst kept secret because of our steering committee. It’s a conference made up of six surgical societies, and my steering committee is made up of the presidents and vice presidents of all these surgical societies. When we made the decision on the call, I did not tell them that this should be embargoed and not mentioned. It slowly leaked out – one surgical society blasted out to their entire membership saying that the conference was cancelled. Lesson learned!”

.....

“

I sent the communications to the suppliers to make them aware because we knew that some of our local members will also tell our suppliers – they’re well connected and know each other.

– Chantal Montpetit
CMP, CMM

Two planners handling international conferences took into consideration international time zones to send out the communications.

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“We had conference calls with the USA board, the global board, and the local host, key partners and stakeholders across the globe, but they’re not in the same time zone. We had to also integrate who hears first based on time zones.”

Melissa Cole and Chantel Beaupre, Co-Owners | Say Something Communications Inc.

“We used the time zones to our advantage. We served the declaration of Force Majeure with the venue when it was the middle of the night in China, knowing that it would only be a few hours until they saw it, and we requested immediate confirmation when they received it. It was six hours between when we sent it, and when we received confirmation. The client sent out the cancellation communication as soon as we told them that we’d received confirmation from the hotel that they’d received the declaration, so it actually happened in a pretty regimented process.”

“I’m pretty sure not a single delegate got notified by the hotel before they got notified by us.”



The tone of the messaging was often as important as what was being said.

Carly Silberstein DES, CED | CEO, Redstone Agency Inc.

“We had some blocks of content that needed to be included, some suggested language, and then we would make sure that they were reviewed before they went out. It eventually went to the board on the client side to make sure that it was industry specific, and not tone deaf.”

Chantel Beaupre | Co-Owner, Say Something Communications Inc.

“Our clients really did not want to scare their members but did want them to be prepared. It’s a very fine line - to not terrify people but at the same time to know how the process is in place so that you’re prepared and know what to do. This was particularly important as we knew things were very difficult in China, but the virus had not yet reached a lot of other parts of the world.”

“

We used the time zones to our advantage.

– Melissa Cole

Karen Norris CMP | Conference Manager, Canadian Association of General Surgeons

“I have so much appreciation now for anyone who works in communications, because every single word that you pick has to be really thought out, since people can interpret that one way or another – you could come across as callous.”

Marie Zimmerman PhD | Executive Director, Hillside Festival

“We did have to go over a few things. One was the tone. The tone had to be appreciative and nurturing, but also realistic.”

Mireille Faucon | CEO & Principal Planner, Events Par Excellence Inc.

“The event was being co-hosted by two organizations. The co-chairs shared the writing of the message. I asked them to share it with their marketing departments or communication departments to make sure it was aligned with their brand and their image. We kept the same kind of tone and approach in all the communication messages.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“We had sent an early message to all the registrants and partners to say, ‘We are in this with you. We understand that you have some questions. We’re going through a deliberate process of investigation, research and consideration. Once we’ve arrive at a conclusion, we will certainly be sharing that with you’.”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“It’s not only the message, but sometimes, it’s the format and how it’s delivered.”

.....

There were often several layers of communications, starting with the clients in discussions around cancelling or postponing an event; with venues and other supplier partners; with both potential and registered attendees; and with sponsors and exhibitors.

Chantel Beaupre | Co-Owner, Say Something Communications Inc.

“We gave the client advice on what their communication to their members should contain in regards to two things: first, on the timing of notifying their members, because we wanted to make sure that they notified their members after the venue had acknowledged the declaration of Force Majeure; second, we gave them the concrete details for their cancellation announcement to minimize the amount of questions that came in from delegates after the event had been cancelled.”

“

It’s not only the message, but sometimes, it’s the format and how it’s delivered.

– Patricia Simpson

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

“If you’re dealing with a not-for-profit or small board, as an event planner or association manager, your responsibility first and foremost is to your board and its executive, to acknowledge and share with them the information that you found doing your research.”

“Communication with the membership at large – our message was to inform our members that we were doing our due diligence, to make sure they knew their investment was handled with care, we provided information supported by research and we opted to refund all registrations.”

“The next level was with the suppliers - we needed to ensure that we were on the same page regarding all sums involved.”

Constance Wrigley-Thomas CAE | *Owner/CEO, Essentient Association Management*

“We did sort of have a communications plan, to get the full support of the board of directors. We have a Communications Committee, and an in-house communications person. The communications person prepared the text for the email to go out to the membership, and put it onto the website.”

Hélène Kenny CMP | *Acting Senior Program Manager, National Judicial Institute*

“The first task was to develop templates very quickly to communicate to people. There were two or three Program Managers who sat together in a room to craft them and edit them, then get the necessary approvals. Once we had those as a template, we were golden. The first communication was to the participants to let them know that the program had been cancelled, then presenters and faculty.”

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

“What was most important was creating a solid communications plan that allowed us to talk to our vendors, or whomever their stakeholders were, in a sequence that worked for everybody. It was a methodical approach that allowed us to control the conversation.”

“We quickly pulled together what the order of communication would be. We went to our senior management team, Vice President and the CEO of the Foundation to share our recommendation of what we wanted to do. Then we crafted a list of people that we were going to have to connect with in order to make sure that it was messaged properly. Being a donor-centric organization, that’s first and foremost to us. Then we went to our major partner. We went to sponsors next – we divided the sponsor list between who was responsible for securing the sponsor.”

“

The first task was to develop templates very quickly to communicate to people. Once we had those as a template, we were golden.

– Hélène Kenny
CMP

Karen Norris CMP | Conference Manager, Canadian Association of General Surgeons

“It was a really difficult process to write it. It was myself, the executive director, and the president who wrote the message. It was the same communication that we used for our speakers, and what we put on our website. It’s on the first page of our homepage right now. It’s a very good balance of being logical, empathetic, and compassionate, as well as highlighting the importance of our conference, and that we’ll meet again.”

“I closed the loop with everybody, even Canada Border Services around the tradeshow.”

Kate Kelly CMP, CMM | Queen Bee & Owner, ConventionALL Management Inc.

“I wrote the original message, and sent it to the Marketing & Communications lead at the University, with whom I was working. He made some changes, then the Dean approved it. We put it on the website, and emailed it to the entire database. We published it in English, then quickly had it translated into a number of languages.”

Krista Benoit | President & CEO, iSPARK Consulting Inc.

“We have a senior communications consultant with quite an extensive background in media relations, including crisis communications. She works for both my company and my client.”

“Myself, the communications consultant and our CEO collectively wrote our cancellation notice. Part of the messaging was ‘Hang tight. We’re working towards some solutions here, and we’ll be back in touch with you with respect to your sponsorship, your tradeshow space, your delegate registration, and all of that kind of thing’.”

“We sent out a communication to delegates within a few hours of officially cancelling the event and said, ‘We’ll cancel all the hotel rooms en masse, and you don’t have to worry about it, unless you tell us otherwise’.”

Leanne Calderwood CMP | VP Global Accounts, ConferenceDirect

“I pulled from the best resources in the industry. In particular, the crisis communications piece, actually came from Alex Plaxen. I got his permission to reuse his resource, and I’ve done that a number of times, whether it’s social media, in our client newsletter, as well as in the personal emails to each and every client. My communications piece was vetted with Alex to make sure that I didn’t change anything from the original intent of the much longer piece, but more of a 10-point action plan that Alex created, that I can send to my clients. He got full credit from that.”

“

I closed the loop with everybody, even Canada Border Services around the tradeshow.

– Karen Norris CMP

Lynda Hoff CMP, CMM | Manager, Membership Education & Events, Ontario Nurses' Association

"I'm very careful about the terminology that I use, because 'postponed' in our world is different than 'cancelled'. I needed to make our leadership and our board understand that postponed and cancelled aren't interchangeable terms."

"Our communication plan was how do we let members know that this has happened, and what's going to fall in its place."

Malak Sidky MHA, DES, HMCC | President, Health Care Event Planning

"When you are told to cancel your client's event, and you're IN THE AIR ... I was Googling the World Health Organization (WHO) links and putting those into the email to let people know the rationale for it. I put together the information that was most critical – 'please cancel your travel plans. Don't worry about the hotel – we've got you covered'. All of those things had to be put into place."

Marie Zimmerman PhD | Executive Director, Hillside Festival

"When the date came that we were going to cancel, we had a communication plan that each and every staff person had to communicate with their people, their stakeholders, and let them know before we officially cancelled. You want them to feel like they matter, because they do. We could not afford to forget anybody. Each and every staff person had a list, and the whole thing was choreographed down to the last minute. At 9:45 AM on the morning of April 30th, everybody has to have finished contacting all of their people. The next thing was to inform all of the ticket holders that we are having to reschedule for next year."

Melissa Cole | Co-Owner, Say Something Communications Inc.

"We suggested to our client that they should have some planned responses ready for delegates, because we knew that they would start to get in touch with us. The client sent out a post to all of their members to say "we're monitoring the situation" and will be in touch soon."

Michelle Planche CMP | President, Paradigm Events

"A good lesson learned was that reacting really quickly wasn't the answer either, because you could be bombarding people with different types of communication and conflicting messages – in the early days, things were changing so fast."

Mireille Faucon | CEO & Principal Planner, Events Par Excellence Inc.

"It's important to have some type of communication plan. Communication doesn't have to be rambling communication – just to the point and a lot of honesty."

“

When you are told to cancel your client's event, and you're IN THE AIR ...

– Malak Sidky
MHA, DES, HMCC

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“We’re going to develop messages, and they are going to have subtle nuances. This is about giving people clarity, being compassionate and respectful, but also showing the leadership and supporting people in the next stage. We need to answer questions that are specific to them. It might be only one line that we change (in messages going to different stakeholders), but it will be the one line that particular audience is looking for.”

Rita Plaskett CMP, CMM, VEMM | President, Agendum Inc.

“The president’s responsibility was communication to internal stakeholders and their board of directors. My responsibility was anything that was external. So, we had a clear division of lines. The two of us worked very closely together to make sure that we were aligned in our messaging.”

“The client was smart enough to hire an external communications company to write the initial messaging that was going out. It was extremely well crafted. That became the cornerstone for their internal team to use and deliver it in whatever way they needed to deliver it within their organization themselves, and to stakeholders. My communications were different, because they were with all the suppliers and hotels. I used some of the terminology that they had used in their communication.”

Ruth Abrahamson | CEO, Base Consulting and Management Inc.

“We spent quite a bit of time drafting the wording and helping each client. They wanted to add certain nuances on their own, and components that related to their sector.”



Several interviewees shared the importance of sending personalized messages.

Jamie Lamont | Director, Special Events & Sponsorship, SickKids Foundation

“We took a multi-pronged approach to communications. First and foremost was the phone call. We wanted to have a phone call directly with the sponsor or patron. We divided up that list, but we had a message already curated around that.”

Krista Benoit | President & CEO, iSPARK Consulting Inc.

“I wanted us to approach each and every of the 430 delegates with a personal email to say ‘hi and here is the situation with respect to you specifically.’”



We spent quite a bit of time drafting the wording and helping client. They wanted to add certain nuances on their own, and components that related to their sector.

– Ruth Abrahamson

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“Emails were sent with a personal signature. Also, if somebody had a particular question, we asked the client to have the appropriate person on their team, depending on the situation, email them directly.”

Mireille Faucon | CEO & Principal Planner, Events Par Excellence Inc.

“The conference chairs chose to send the message to their committees themselves. In the body of the email, they would personalize the message, then they would attach the PDF. It was always ‘here’s the message going out to our audience’. Then they would add a little bit more that was personalized for that particular group.”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“We had to develop those key messages. We did it in a personal email to each of those groups.”

Sue Mercer | President, Step In Marketing & Event Solutions

“After we decided that we were postponing, the first people that we contacted were the members. The president sent out a personal letter. We started with it being all about them – how are they? I deliberately wrote it that way on his behalf, because we wanted to make sure they were okay.”

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Websites were a vital tool for communications in this crisis. Many of our interviewees described how this was a key component for clients and organizations.

Bobbi Hoffman CMP, CMM | Director of Operations/Meeting Planner, The Bayley Group

“We knew right away that a COVID message had to be placed on the website, before we really knew what was going to come next. It said, ‘Please stay tuned, we’ll be back with further details’. Within the week or so, we had sorted out what we were going to do. So, website, registered delegates, sponsors – all of our stakeholders knew what we were doing.”

Chantel Beaupre | Co-Owner, Say Something Communications Inc.

“The client had sent out a notice to say that ‘we’re in the process of reviewing our options’. We put that up on the website, and people stopped booking their hotel rooms.”

“

We knew right away that a COVID message had to be placed on the website, before we really knew what was going to come next.

– Bobbi Hoffman
CMP, CMM

Chantel Beaupre (cont'd)

“Because we had a closed audience, we took the website completely offline, just put it on maintenance with a note on the landing page saying that we are working through the details, and we’ll get back to you as soon as we can. Check your emails, or please contact your head of delegation to get more information.”

Lauren Stewart | Director, Conferences & Operations, BookNet Canada

“We started building a page for the website that we then directed the staff team to. If they started getting questions, they could use that page as a definitive source, so that everyone will be using the same line of responses.”

Lynda Hoff CMP, CMM | Manager, Membership Education & Events, Ontario Nurses’ Association

“We have a communications department. They’ve been very helpful in crafting the messaging. I thought I was inundating our members with information. How much do we give them when they are engrossed in ‘What do I do with my family to keep them safe? How do I keep myself safe at work?’ What we did was a concerted effort – we posted things on our website: status, updates on dates, etc. We did an overall eblast that this was going to happen, then posted our updates on the website. If anybody wants to take a look, instead of having to search through 100 emails, they go to our website. They can see what is going to happen and what was cancelled.”

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“We said to the client that you need a main message – you need a place on the website where people can refer to regularly, and update regarding COVID-19. The messages were being updated every week or so. People needed to know it was updated, so we would tweak it and make sure it was dated at that time.”

Mireille Faucon | CEO & Principal Planner, Events Par Excellence Inc.

“It’s important that everyone can see the communication. By putting it on the website, it can’t go anywhere – it’s right there.”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“The website is absolutely one of the key things. It was number one on my list. Let’s update the information there.”

“

We started building a page for the website that we then directed the staff team to ... so that everyone will be using the same line of responses.

– Lauren Stewart

Rita Plaskett *CMP, CMM, VEMM* | *President, Agendum Inc.*

“I put a big message on the front of the conference homepage to say we’re still considering doing the conference at this moment in time. Also know that you’re 100% refundable at any given time.”

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Many valuable insights around communication were shared during these interviews.

Caroline Aston | *Principal, Aston Events & Communications*

“We didn’t bring in a crisis communications group. All of our clients are very well run, quite sophisticated organizations with experienced staff and expertise at the table. They have enough internal capacity to be able to handle the crisis. I didn’t think there was a need to bring in outside experts, based on the client’s experience and expertise.”

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

“Because we have a closed membership, Basecamp has allowed me to create a great room for all the members to access information, and for me to share instantly with our members.”

Constance Wrigley-Thomas *CAE* | *Owner/CEO, Essentient Association Management*

“I realized it was so critically important to communicate the message. We actually pushed it out a couple more times as well, because knowing human nature, people don’t read everything they get. They don’t necessarily scroll down. We made sure that the message was right at the top of the email, not buried in the third paragraph down. We had to give the bad news early in the message. We did keep an eye on the open rates, just to make sure, because that might have influenced how many other times we sent it out.”

“The message was also pushed out through our various social media platforms. This event is not specifically a members-only event. About only 30% of the attendees are members – the rest are our industry folks, so the message went out to everybody.”

Harpreet Atwal *Special Event Management Diploma* | *Senior Events Coordinator, Executive Platforms*

“We actually chose to send out the message (about postponing and what would be in its place) all at once. We felt it was better in terms of alleviating any missed memos. From a planner perspective, it’s better use of your time, as opposed to receiving an influx of emails from attendees asking you questions that you aren’t even able to answer at that point.”

“

From a planner perspective, it’s better use of your time, as opposed to receiving an influx of emails from attendees asking you questions that you aren’t even able to answer at that point.

– Harpreet Atwal
Special Event Management Diploma

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

“(For our event messaging), we wanted to make sure that we were in line with what was coming out of the hospital too, so that we weren’t saying wrong facts and figures. We had to use lay terms, not massive medical terms that might scare people. We had to say what we’re doing and why.”

Malak Sidky *MHA, DES, HMCC* | *President, Health Care Event Planning*

“At the end of every one of my emails to the speakers, I wrote ‘please confirm receipt of this email’. One speaker didn’t get back to me, so I ended up texting them. When I didn’t hear back from them, I reached them by phone. It was important to ensure that they knew the conference was cancelled.”

Mireille Faucon | *CEO & Principal Planner, Events Par Excellence Inc.*

“We did offer those who required a supporting letter that the conference was cancelled due to Force Majeure, so they can hopefully recoup any fees or travel expenses.”

Patricia Simpson | *Manager, Marketing and Events, Canadian Council of Motor Transport Administrators*

“I always looked at it from the perspective of if I was participating in an event, and I was this person, what information would I want?”

Sue Mercer | *President, Step In Marketing & Event Solutions*

“Communicate often, and well.”

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We interviewed one supplier partner:

Stewart Hall | *President, Rock the Stars*

“I had bookings with 2 clients. They told me immediately as soon as they knew that the meetings were being postponed or cancelled. I completely understood, obviously. I had the utmost compassion for people – my clients and the musicians I’m working with. In both cases, the notice was in an email – they were professional, friendly and apologetic.”

“Other bookings were in process, so basically pre-contract or proposal stages. For those, nobody notified me of anything. For every 10 proposals, I probably only hear from one or two of those. I normally have to find out myself, so I’ll follow-up.”

“

Communicate often, and well.

– Sue Mercer

“Are You Ready? – Risk and Crisis Management

Some of our interviewees were prepared, to a certain degree, to handle this crisis. The majority of our interviewees were not, but rather, drew on their experience from handling on-site risk management as best they could. How could anyone be totally prepared to manage a pandemic that basically shut down the global economy and our daily lives?

Here are some insights from those planners who did have a few more resources than most:

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

“Through CSAE, I have their risk management documentations and prescribed best practices. I knew which document I needed to pull, which information I needed to have at my fingertips. Just the thought of knowing that I knew which step I needed to take was such a relief for me – coming at it in an organized manner.”

“My crisis plan was very similar to my crisis communication plan. It’s about risk assessment from all angles, relationships with all of your stakeholders, and the order in which you communicate.”

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

“I sit on the risk management committee at SickKids Foundation. There’s a group of eight or nine of us that represent different interests within the Foundation. We’ve basically put together a very documented risk management policy. We actually won an award for it from the Law Society.”

“For a recent event, we had to put together a risk management policy for the City of Toronto for the venue that we were using. They required a full emergency plan, so we built a larger strategy plan around how you tackle a pandemic, terrorist threat, missing children, etc. Obviously, the hospital had dealt with SARS in the past, so we were aware of various kinds of health threats.”

“Are You Ready? – Risk and Crisis Management

Kate Kelly CMP, CMM | Queen Bee & Owner, ConventionALL Management Inc.

“I met with the representative from the Calgary Convention Centre to discuss their emergency plan. I was thoroughly impressed that they had a very detailed pandemic plan. It included the cleaning and how that was going to happen, what if their staff got sick, etc.”

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Some of the interviewees mentioned using escrow services in the future to hold clients’ money safely until it is needed to make payments to venues and suppliers.

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And to sum up crisis planning:

Lynda Hoff CMP, CMM | Manager of Membership, Education & Events, Ontario Nurses’ Association

“But if we don’t plan for the bad stuff, we’ll never get out of the bad stuff!”

“

But if we don’t plan for the bad stuff, we’ll never get out of the bad stuff!”

– Lynda Hoff
CMP, CMM

Let's Get That In Writing – Post-Pandemic Documentation

What is going to be most helpful for Canadian event planners, and the Canadian meetings and events industry as a whole moving forward, is documentation of what has occurred, and recommended best practices for the future.

Andrea Boulden | *Senior Manager, TD Bank*

"I've asked someone on my team to create a document with the chronology of the steps that we took. She's documenting everything we did, and that would essentially be our documentation. We just need to make a more general one for the programs that we do."

Caroline Aston | *Principal, Aston Events & Communications*

"I have some documents that I'm actually going to start going back and dropping more details into. One document basically diarizes what happened at Aston Events and the other is what happened to these two particular clients. I will revisit and fill in some of the blanks, as I remember them, so I can keep them current."

Chantal Montpetit *CMP, CMM* | *Meetings, Director, Entrepreneurs' Organization*

"We didn't have any crisis plan. Our organization tried to work on a crisis plan, but we always put it on the side until it happened. We need to create one; we need to have one. We have some bits and pieces here and there that we gather, but we will work on that. Now is the time to work on it, because we are a little bit slower."

"For the event that was postponed, we did change some clauses in the contract. We do have a sanitization clause now, not just a cleaning/cleanliness clause. It's a Convention Centre, and some have been turned into hospitals or shelters, so we want to be triple sure that we're all covered, and everything is safe when we go back."

Chantel Beaupre | *Co-Owner, Say Something Communications Inc.*

"Melissa and I are planning to formalize a crisis plan with check lists to make sure things are covered. We want to get the client to buy in as well. I think that is the biggest take-away from this series of events – we should have separate, customized crisis plans for each client."

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

"Coming out of this, looking at the responses from the insurance companies, we're going to be even more diligent in terms of tracking every single communication."

Constance Wrigley-Thomas CAE | Owner/CEO, Essentient Association Management

“There’s a lot to be learned from this experience that we can take and apply it in the future. We are starting to document these things now. We many never go through something like this ever again, but you still need to be prepared.”

“We’ll have a board package, with an executive report in it of what has happened. Then the board package becomes institutionalized in all of our documents.”

Harpreet Atwal Special Event Management Diploma | Senior Events Coordinator, Executive Platforms

“The new future trend will be implementing a pandemic clause in contracts, that is a subset of the Force Majeure. This should be for any pandemic-related disease, or any restrictions that don’t allow us to fulfill the needs of our event.”

Hélène Kenny CMP | Acting Senior Program Manager, National Judicial Institute

“I think there’ll be some lessons learned. We need to do a senior management team debrief. God forbid that should ever happen to us again. We should have plans in place ready to go. We’ve documented a checklist, so that you know step one is this, step two is this, step three is this. It’s a sequential, very organized methodical approach within our checklists. We have a very strong portal that has templates for everything. We need to create a template binder so that we can do a walk-through with anyone new, or if we bring in an external planner.”

Jamie Lamont | Director, Special Events & Sponsorship, SickKids Foundation

“We’re definitely looking at putting together a debrief file – taking our learnings and putting it into some kind of process documentation or electronic file, so that it’s available when we need it again.”

Jessica White CMP | Director of Operations, KCI Management Inc.

“We’re having a whole team dedicated to what the future of events looks like, and all these pieces that need to change. So often when we’re planning these events, we’re so focused on what is happening right now. Risk management, which is so important, often gets pushed to the side, and not thoughtfully considered until the 11th hour. Now people are going to ask what your ‘rainy day plan’ is, what’s your Plan B, even before you go to contract. You’re going to have to know what your Plan B is.

“

There’s a lot to be learned from this experience that we can take and apply it in the future.

– Constance Wrigley-Thomas CAE

Jessica White (cont'd)

How do we now take everything that we've learned and start planning for this, and apply it to all of the other areas of the planning piece?"

"When we start revamping these Force Majeure clauses, we're putting in as many conditions on the venue as possible from the planner side. My thing is to also think about what they are going to come back with to cover themselves. How do we meet in the middle and find a fair outcome? As much as I do want my client to get the most out of this by enacting a Force Majeure clause, it really does impact the hotel. We want these partners to exist when we start getting back to life as well."

Karen Norris CMP | Conference Manager, Canadian Association of General Surgeons

"I really want to take the rest of this year to put together all the lessons learned and put forward what I suggest we should do."

Krista Benoit | President & CEO, iSPARK Consulting Inc.

"Guaranteed, what's coming out of this is a tool and a template – there's no question. These resources, tools and templates will exist so that people will have the checklist."

Lynda Hoff CMP, CMM | Manager, Membership Education & Events, Ontario Nurses' Association

"Our chief legal analyst is really good about looking at our contract language, etc. She and I worked together a year and a half ago to ensure that our Force Majeure clause was what it could be or should be. Is it perfect? Absolutely not. We'll learn again from this."

"We need to review our contract language and make sure that it is not only in the present tense, but in the future tense, because the next bad thing is going to happen, and we just need to be ready for the next bad thing, whatever that is going to be."

Malak Sidky MHA, DES, HMCC | President, Health Care Event Planning

"It would be great if we could have a document of best practices for cancellation of events, whether it's COVID-19 or anything else. That should be something that has to be integrated into your emergency plan."

“

We need to review our contract language and make sure that it is not only in the present tense, but in the future tense.

— Lynda Hoff
CMP, CMM

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“There are lessons learned on both sides. Whenever we're at the end of a project, we always orchestrate a post-evaluation, and we also do an internal one, because that is a different discussion.”

Mireille Faucon | CEO & Principal Planner, Events Par Excellence Inc.

“We haven't done a post-event debrief. I don't know that the client is very interested in doing it – they're not event planners, and they may not do this again. If they had a hint that a pandemic would be coming, they wouldn't even touch it with a 10-foot pole, because they volunteered for this.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“We actually convened the last meeting of the committee to give them an update that we've done this, and we've done that. We have that meeting to share – is there anything that people feel we should have done differently, could do better, or learn from?”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“So now when we're going through the process of negotiating those contracts for subsequent years, there will be nuances and changes. Everyone is taking a really fine-tooth comb to those now, and really making an effort to make sure those pieces are corrected in there, as they should be. I find that we're using legal counsel a little bit more to make sure things are where they should be.”

“I think it's going to be important to have those pieces in place in a cancellation plan. We will document that as a process now. All of the folks that were engaged on different levels from communications right through to finance and governance – the cancellation plan really does impact everyone. There has to be that process in place.”

Rita Plaskett CMP, CMM, VEMM | President, Agendum Inc.

“I'm going to do a full documentation of the process. I'm doing it now, outlining the steps taken, who and when to reach out to, and when to start the plan. Also, in this plan are other alternatives such as virtual conferences, hybrid conferences, relocation of destinations, other ways to celebrate, educate, and bring people together, should this, or something like this, keep people apart again.”

“

If they had a hint that a pandemic would be coming, they wouldn't even touch it with a 10-foot pole, because they volunteered for this.

– Mireille Faucon

Ruth Abrahamson | *CEO, Base Consulting and Management Inc.*

“We’ve been documenting the process as it goes along. We are currently rewriting everyone’s budget. As a part of that budget and operational process, we are documenting new procedures and processes.”

Tuesday Johnson-MacDonald *CMP, CMM* | *Founder and President, TAP Resources*

“We have a broad emergency plan, but we’re going to have to add something in there about this kind of a situation, in case another Coronavirus outbreak happens, or something like that. In all the discussions that are out there right now, there is a sense that the meetings industry is going to change. We don’t know how much, but I do think that meetings and conferences are never going to go away.”

“

As a part of that budget and operational process, we are documenting new procedures and processes.

– Ruth Abrahamson

Points of Distinction – Interesting Aspects Specific to Some Interviewees

- ▶▶ One corporate planner told us that her company confirmed that no employee would lose their job during the COVID-19 pandemic; this provided a huge amount of reassurance and less pressure for their team.
- ▶▶ Several planners' clients had awards ceremonies and presentations as a component of the events that were being cancelled. This was a difficult situation to deal with when simply shifting to another year did not provide the award recipients with the full recognition or benefits that were owed them, nor did it maintain the prestige of the awards event.
- ▶▶ A couple of planners, whose client events were being postponed/shifted to another year, mentioned that some venues wanted to either keep large deposits, or asked for large amounts upfront in order to have cashflow to 'float' their business. This is not acceptable. It also highlights the need for clearer language in contracts.
- ▶▶ Site selection for future years may need to consider profit generation in cities where the attendance may lessen.
- ▶▶ Some planners, although they constructed the communications, did not have control over it being sent out to stakeholders. This became problematic when the client was tardy in sending the communications out.
- ▶▶ Cancelling or postponing events to another time became an issue if presenters' topics or research within the education component, may have been specific to this point in time, and not relevant at a future date.
- ▶▶ Sponsors and exhibitors relying on face-to-face opportunities with attendees could be impacted, not only financially within their business, but in regards to their careers.
- ▶▶ When rescheduling events, some planners' clients had to deal with governance issues of their by-laws if they had specific timelines for their Annual General Meeting, or rotational specifics around geographical locations of their events.

Notable Nuggets – Capturing Planners’ Brilliance

All of our interviewees provided a treasure trove of insights.

Here are some of the moments of brilliance and helpful tips that we were able to capture:



It is very important to be aware of the news, through a TRUSTED news source

Andrea Boulden | *Senior Manager, TD Bank*

“Watching the news, not obsessively, but watching because the news impacts us more than ever. It’s now part of the job requirement that you watch the news every day, because so much is changing.”

Carly Silberstein *DES, CED* | *CEO, Redstone Agency Inc.*

“It was balancing all of that and trying to keep ahead of the curve as much as we could. I feel you just have to listen to Prime Minister Trudeau’s address at two o’clock and act right away because details of the fiscal tools and instruments were changing by the minute.”

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

“I have two sons who live on Reddit and in the Twitter world – they had been watching COVID-19 since the beginning of the outbreak in Wuhan, China. They were sending me photos and content that we were not seeing anywhere in Canada or the U.S. So, I started being aware as early as December.”

“To those who were not aware yet, I would send a link to either the World Health Organization, or the BBC, because the BBC was covering worldwide stories.”

“I was researching every possible angle. Everyone has their preferred media outlets. Between CTV, Global, CBC, CNN and Fox News, the story coverage was done through different lenses. I was also watching APTN to better understand the Indigenous news coverage. I also went online and looked at foreign media coverage. I wanted to have the best understanding of the issues at stake before I would speak about it.”



Stay up to date in your industry through a variety of trusted and pertinent sources

Andrea Boulden | *Senior Manager, TD Bank*

“I read a lot of industry articles, going on webcasts, and trying to distill it down to what’s important, what’s happening, and how that will affect the future.”

Anita Carlyle B.Comm., CMP, CMM | *Managing Partner, MCC Events*

“We do follow all CIC (Convention Industry Council) documents. We have crisis plans and emergency plans, and follow the same procedures for any of our events. They are very strict, so no matter what the program, we follow the exact same rules. A lot of our event planners do take St. John’s Ambulance courses every couple of years.”

“I went to school for hospitality. I’ve taken every course under the sun. I’m a member of three different associations and take all their learning. I’m a sponge.”

Bobbi Hoffman CMP, CMM | *Director of Operations/Meeting Planner, The Bayley Group*

“If you’re unsure, reach out to someone in our industry. During one of the first webinars that I took, other people were sharing their stories. Reach out to whatever groups you belong to and look for support.”

Karen Norris CMP | *Conference Manager, Canadian Association of General Surgeons*

“The information that was pushed out to us by Professional Convention Management Association (PCMA) and by Meeting Professionals International (MPI) was incredibly crucial at this time. I absorbed every piece of information that I could.”

Kate Kelly CMP, CMM | *Queen Bee & Owner, ConventionALL Management Inc.*

“I hope that planners have surrounded themselves with colleagues that will support them, colleagues that they can work with in a group like the Canadian Society of Professional Event Planners (CanSPEP), that is a resource.”

Krista Benoit | *President & CEO, iSPARK Consulting Inc.*

“Even if you are a solopreneur, and you don’t have a team – DO NOT attempt to do this alone. Reach out to other colleagues and get their advice and opinions, or bring some other people into the mix, at least for the short term. It is very overwhelming, and you can second guess yourself a lot.”

“

I went to school for hospitality. I’ve taken every course under the sun. I’m a member of three different associations and take all their learning. I’m a sponge.

– Anita Carlyle
B.Comm., CMP, CMM

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“Do your homework! Business intelligence is reaching out to your contacts, your industry experts – you need to reach out at every level. People are more than willing to help you paint the picture that you need for that particular client. We cannot assume, and we cannot generalize – every single one is unique. It’s hard to resist the temptation to just label something. So, we need to balance all of that. The challenge is to orchestrate the right solution.”

Nikki Sayers CMP | Senior Program Planner, KCI Management Inc.

“My advice would be to reach out to other planners to see what they are doing. I also reached out to four or five sales directors from different properties that I felt comfortable having candid conversations with, to ask what they are seeing, and what was happening. I wanted to try and get the lay of the land before cancelling. I was trying to see what their position was, and how they were handling it.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“Recognize where you have knowledge, capability and expertise, and where you don’t. Have the courage to reach out to colleagues, other experts, people with good counsel, and who you trust.”

Ruth Abrahamson | CEO, Base Consulting and Management Inc.

“I think the best thing we have is a family – a network of industry colleagues in the meetings industry and in the association industry, who are willing to share. I was so thankful for the sharing and best practices that our industry colleagues made available to us.”



Keep an up to date, detailed record of work done, so that you know what has been done for clients at any given time

Anita Carlyle B.Comm., CMP, CMM | Managing Partner, MCC Events

“We are on retainer (with our client). They said, ‘should we decrease our compensation? We have to keep paying when you’re not doing as much’. We responded ‘We’re actually doing more – you saw the results’.”

“I think communications moving forward about our services leading up to an event, and how to monetize that will be a little bit more specific on what we do every day leading up to the event, so that we don’t have to back track and justify what we did versus what we do. That is a big learning forward. Luckily, we do have a pretty good system, and a lot of it’s tracked. It has to be an ongoing exercise, so that we know what we have done for our clients at any time, and we don’t have to go back and look it up.”

“

My advice would be to reach out to other planners to see what they are doing.”

– Nikki Sayers
CMP



Use kindness, empathy, respect and honesty with those you are dealing with – it's all about relationship capital!

Bobbi Hoffman CMP, CMM | *Director of Operations/Meeting Planner, The Bayley Group*

"Be kind to those you are dealing with, and know that they are going through the same thing."

Kate Kelly CMP, CMM | *Queen Bee & Owner, ConventionALL Management Inc.*

"How you treat people in a time like this, I think really says a lot about your business model, and how you treat your staff."

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

"People care is so important when this is happening. Your staff team is not just there for this event. We are together for previous events, and those that are coming in the future. We have very little turnover. We have some people that have been with us for 15, almost 20 years. The strength of our organization is for that reason."

Marie Zimmerman PhD | *Executive Director, Hillside Festival*

"Proceed with your heart and your head, not forgetting to be grateful for the people who are helping you, and not to go overboard when you're not getting an answer. Throw yourself in like you need to save your organization. It's not because it's an organization – it's people, it's a bunch of people, and they're an industry. If you're not advocating for them, there aren't other people who are going to do it for you."

Nowshad Ali CFRE, CPBA, CPVA | *President & CEO, On Purpose Leadership Inc.*

"Whatever decisions we have to make, I want that when we see each other walking down the street in the community, neither one of us drops our eyes. I want to come through this so that we can look each other in the eye with joy and pride."

Pearleen Mofford CIS | *Former Managing Director, Downeast DMC*

"Just be honest. Traditional modes of communication like picking up the phone and having a conversation for me just reconfirmed how important is that human connection."

“

Whatever decisions we have to make, I want that when we see each other walking down the street in the community, neither one of us drops our eyes. I want to come through this so that we can look each other in the eye with joy and pride.

— Nowshad Ali
CFRE, CPBA, CPVA

Sue Mercer | *President, Step In Marketing & Event Solutions*

“We truly are all in it together, regardless of where you’re coming from. So, whether you’re a supplier, the venue, the clients, the planner – we all have the same objective, which is to cancel, postpone, whatever that decision is. We want to approach our decisions so that we’re all getting the best out of the decision.”

Tracy Scanks | *Owner/Executive Director, ProConference Advantage*

“People are recognizing that we not only have to be there for our clients, but we have to be there for each other.”



Virtual events – not necessarily an easy ‘pivot’

Bobbi Hoffman CMP, CMM | *Director of Operations/Meeting Planner, The Bayley Group*

“I was excited when we were starting to plan the online meetings, because I was feeling like a planner again, instead of cancelling and postponing, and redoing contracts.”

“For this particular event, the sponsors are keen to be involved in this, because their (medical) machines are going to be shown. With the online meeting, we’ll be able to brand the site, and show their logos, so they’ll still be recognized – they didn’t balk at making any changes. We’ve actually looked into virtual trade shows for two of our clients. We’re building a website that you attach to your current conference website. It allows you to go into a virtual tradeshow, clicking into the company. They can put a video or a commercial – basically they can put whatever they want in their room. We’ve redeveloped the sponsorship packages to reflect that new option.”

Dustin Rivers | *Partner, Verney Conference Management*

“Many of the events that we’ve been doing on virtual camp has taught us a number of things. I would not deliver a virtual session for any more than 45 minutes. 30 minutes is ideal, so that you can actually get something accomplished in a session, while also retaining the individual’s attention. Typical in-person events were generally over one, two or three days, and the agenda was jammed packed. We know in a virtual environment, that won’t happen because people just will not have the capacity to sit and watch a computer screen, especially with the thousands of distractions that we have in the way we’re living right now. You just don’t have the ability to do that.”

“

People just will not have the capacity to sit and watch a computer screen, especially with the thousands of distractions that we have in the way we’re living right now.

– Dustin Rivers

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

“One of our largest events, ‘SickKids Get Loud’, is a march and music festival celebration for families. We’re going to look at taking that virtual. There’s lots of interesting discussions around that, because virtual doesn’t necessarily mean successful.”



Looking after your own staff’s health means they can then look after clients

Carly Silberstein *DES, CED* | *CEO, Redstone Agency Inc.*

“We were pretty immediate to send out a note to our client saying that we have our pulse on the situation. We’re monitoring it from an internal perspective in terms of what we’re doing as an office, with our staff working from home. What we are doing to support our staff to keep them safe. Then we were timely in letting them know how we were going to help their organization through this.”



Consider geographic location of the client to understand how the pandemic is being perceived, managed and communicated

Carly Silberstein *DES, CED* | *CEO, Redstone Agency Inc.*

“We have a lot of people to wrangle and different clients with different timelines. Some are international vs regional or provincial vs Canadian nationals. We have a few in the US, but then you have everything coming out of ‘Trumpland’ – no judgment, just it’s a different pace than what we’re in, and a different tone to what Canadians are hearing.”

Chantal Montpetit *CMP, CMM* | *Meetings, Director, Entrepreneurs’ Organization*

“We have chapters in 191 countries. When we cancelled, we heard a little bit of rumbling from Asia, since COVID-19 was already there. Italy was having a high level of cases. We were a little ahead of the curve in our cancellation timing, so counterparts in Canada were saying, ‘Why are you cancelling? We have no COVID cases (which they didn’t at that time).’”

“

We’re monitoring it from an internal perspective in terms of what we’re doing as an office ... to support our staff to keep them safe.

– Carly Silberstein
DES, CED

Chantel Beaupre | *Co-Owner, Say Something Communications Inc.*

“We were planning an international conference in Beijing, China. It involved 2 international associations with people from 65 to 70 countries. We cancelled on January 30th – 2 months before the conference. We’d actually been getting some questions from delegates. There was no surprise that we might have to cancel it.”



Treat the financials of your employer’s or your client’s event as if the money was your own; think of other aspects of decision-making like an owner or stakeholder in the business or organization

Chris Lutz | *Partner/VP Program Development, Verney Conference Management*

“I would say a piece of advice that I’ve picked up over the years would be regardless of how or who you’re running a conference for, always negotiate on your client’s behalf, as though you were negotiating for yourself. Don’t ever allow your client to sign something, or engage in something that you wouldn’t be comfortable engaging in when it’s your own money on the line.”

Constance Wrigley-Thomas CAE | *Owner/CEO, Essentient Association Management*

“We look at our staff as stakeholders in our business. We ask them to think of yourself as if you are an owner of the business, or think with an owner’s mindset. When we share information, we share it with them as if they are an owner – that makes a difference.”

Dustin Rivers | *Partner, Verney Conference Management*

“When we start an event, we always look at the worst-case scenario first, and what’s our exposure. Whether it be a pandemic, or something like ‘911’, we’re in a position where we can react and have very little financial repercussions to us from a money going out the door perspective.”

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

“Think of everything – like if we don’t get this money back, we’re laying someone off. I could not deal with that unless I’d tried my hardest to get it back.”

Melissa Cole | *Co-Owner, Say Something Communications Inc.*

“Imposing liability on the client is our main concern, because any liability on them flows to the delegates. The burden is placed on the client and on the delegates in additional costs that are incurred.”

“

I would say a piece of advice that I’ve picked up over the years, always negotiate on your client’s behalf as though you were negotiating for yourself.

– Chris Lutz



Experience is what helps you deal with crisis

Carly Silberstein *DES, CED | CEO, Redstone Agency Inc.*

“We were a little bit more prepared for the pandemic just as it came upon us because of a client event in November where the client had a bomb threat. From that, we struck a health and safety task force within our Redstone team. We had policies developed, basic things, but we learn from all of these experiences.”

“Believe in yourself – you have the tools, you have the skills, and you have the experience to lean on, to get you through this.”

Constance Wrigley-Thomas *CAE | Owner/CEO, Essentient Association Management*

“Risk management is really about having those experiences that you can reach into your toolkit, pull them out and say, ‘I’ve been through this before. I know I will get through that’. I always use the analogy of the toolkit, and the more tools you have, the good useful tools, you can reach in and pull them out. So, as much as you may not have the preparation for that specific situation, you have the toolkit that will help you through it, or know how to manage your response to it.”

Harpreet Atwal *Special Event Management Diploma | Senior Events Coordinator, Executive Platforms*

“If you thoroughly understand how to construct it, you should be able to deconstruct it as well, because it’s a puzzle that you’re putting together and taking apart.”

Hélène Kenny *CMP | Acting Senior Program Manager, National Judicial Institute*

“I think I had enough life perspective to say we’ll get through this.”

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

“I’ve learned to trust my judgment, and my experience around this world of events, and use that judgment to help others as well.”

Jessica White *CMP | Director of Operations, KCI Management Inc.*

“Let’s take our learnings – this is going to make us better planners in the end.”

“

Let’s take our learnings – this is going to make us better planners in the end.

— Jessica White
CMP

Karen Norris CMP | Conference Manager, Canadian Association of General Surgeons

"As cliché as it sounds, trust yourself, trust your gut, and trust your training. You sink to the level of your training, and your confidence. Those who have good training and great confidence will rise to the top. So, have confidence in yourself; you were born to do this, and you're good at this."

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

"I think that life prepares you when you've got enough experience"

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

"Life experience has provided me with the most insight and ability to adapt."



Know who is on your team and your client's team, and what experiences they have had with crises

Caroline Aston | Principal, Aston Events & Communications

"Both of these particular clients had staff who had been involved during SARS. The new executive director at one of my clients used to work in a Cabinet Office, so he has a background in government – we watched the daily government briefings together."

Jamie Lamont | Director, Special Events & Sponsorship, SickKids Foundation

"Communications was managed in collaboration with our hospital partners. They're part of the TAHSN group of Toronto hospitals that deal with crisis communication. They're fairly well-versed in their process and procedure. We were able to learn from them. We do have an in-house counsel for the SickKids Foundation, which is an awesome resource to have, both from a liability standpoint, and within our contract management process."

“

So, have confidence in yourself; you were born to do this, and you're good at this.

– Karen Norris
CMP



Event cancellation insurance will be very important in the future

Caroline Aston | *Principal, Aston Events & Communications*

"Many clients don't have event cancellation insurance. You would have this discussion with them as to 'What do we need event cancellation insurance for?' You would try to explain to them why it would be important. Now, we have the perfect example! Never again will I let clients try and walk away from cancellation insurance. Now we have a myriad of stories to tell them why it's important to have it."

Karen Norris CMP | *Conference Manager, Canadian Association of General Surgeons*

"I heard a great piece of business advice recently. It was in regards to event insurance, perhaps pre-COVID. I was shocked at how many planners don't have event insurance. We've always had it. The individual who was speaking said, 'Your annual general meeting, or your conference, is a revenue line item – a big one. You need to think of it as a business. You insure your house, your car, your business, you insure anything that has value to you. So, why would you not insure your AGM?'"



Take a step back and assess, before taking action

Chantal Montpetit CMP, CMM | *Meetings, Director, Entrepreneurs' Organization*

"The challenge right now is we don't know if we won't be faced with the same situation again – in a month, in two months, in a year – we really don't know. Before jumping in, step back – it's the key part."

Hélène Kenny CMP | *Acting Senior Program Manager, National Judicial Institute*

"Remember to breathe – and it will be OK."

Jamie Lamont | *Director, Special Events & Sponsorship, SickKids Foundation*

"We took a very slow and methodical approach to get there. I was really happy that we didn't have to do it in the spur of the moment, because that's a tough call."

“

Remember to breathe – and it will be OK.

– Hélène Kenny
CMP

Lynda Hoff CMP, CMM | Manager, Membership Education & Events, Ontario Nurses’ Association

“Take the space to think, because somebody is going to be coming at you, and they want an answer right away. If we take a breath, and think about what the whole process looks like, you’ll be able to work through a checklist, whether it’s written or in your head. We need to be very intentional about how we do things, and what the outcome is going to be moving forward. You really need to take the time to step back and say, ‘OK, here’s the process that I’m going to go through. Here’s what my responsibilities are to each of those groups’, and really put that plan in place.”

Michelle Planche CMP | President, Paradigm Events

“The advice that I would give is pause for a minute. Breathe!”

Tuesday Johnson-MacDonald CMP, CMM | Founder and President, TAP Resources

“Breathing and deep breathing to help clear your emotions about whatever is going on has helped me. Clear your head so that you can think strategically. You need to look at a lot of different pieces, and at the health of the people coming into the event.”



Be aware that things can change very quickly in a time of crisis

Caroline Aston | Principal, Aston Events & Communications

“The world became completely different. You would find that what was the right decision in the morning needed to have a new approach in the afternoon. It just evolved like any true crisis. You would make a plan in the moment, which seemed like a good strategy to carry you through the next little while, but very quickly, you would have to adapt that plan. Sometimes you’d write an email, press send, and the minute you’d pressed send, it was out of date.”

“

Clear your head so that you can think strategically. You need to look at a lot of different pieces.

— Tuesday Johnson-MacDonald
CMP, CMM



Know the “financial cliff” of your event, business or organization to ensure financial stability

Karen Norris CMP | *Conference Manager, Canadian Association of General Surgeons*

“My work in regards to risk management broke everything down to the dollar that I would be paying by month. We were able to see how I would start spending more money on the event if we didn’t make a decision. Knowing what you’re spending at any given time in the year is important to know. The most important aspect of your job is the financial aspect, and knowing that you have the funds to put on this conference, but you can also protect it financially, should anything go wrong.”

Pearleen Mofford CIS | *Former Managing Director, Downeast DMC*

“Look at engaging a business coach who could help you better understand what the financial cliff is. Really understanding how long you could actually survive.”

Tuesday Johnson-MacDonald CMP, CMM | *Founder and President, TAP Resources*

“I built this company with the knowledge that ‘consultants/entrepreneurs’ live with the reality of feast or famine. So, in the back of my mind, I was thinking that would mean a few months of having no contracts, and that we would need a safety net to keep the company and staff secure and safe. I wasn’t really thinking a pandemic...”



Know your audience/demographics to communicate properly in a crisis situation

Hélène Kenny CMP | *Acting Senior Program Manager, National Judicial Institute*

“It wouldn’t have made sense for us to bring in an external party.”

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

“Our stakeholder groups were the Board, attendees and potential attendees, speakers, and our suppliers. We knew that these four stakeholder groups would have slightly different kinds of information going out to them. Also, we would be getting different forms of information coming to us.”



Knowing what you’re spending at any given time in the year is important to know.

— Karen Norris
CMP



Date important communication so that people know that the data or pertinent information is current

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

“We were following the advice of the trusted organizations – Toronto Public Health, World Health Federation, and the federal government. We would always point to original sources. So, if there was something on their website, we would quote it, then we would link to it, and put the date when it was put there. Any communication that we were sending or posting (website, Twitter, emails) always had a date. That way, there would be fewer questions regarding ‘Is this dated information? Is this what they’re thinking, currently?’”



In advocating for your event sector, connect with political representatives

Marie Zimmerman PhD | *Executive Director, Hillside Festival*

“What I’ve learned is that if you need to advocate for your sector, have a channel to a Member of Parliament or a Member of Provincial Parliament. What I was advocating for ultimately funneled down to one thing, which was to give us a mandated cancellation for festivals in Ontario.”



For an event with history, use metrics to create a defense for decision-making

Malak Sidky MHA, DES, HMCC | *President, Health Care Event Planning*

“All of our sponsors have either backed out, or not committing. We have received less abstracts than usual, and the quality of the abstracts was not stellar. Several of our speakers have indicated that they’re unable to attend, which would mean that the quality of the program wouldn’t be good. This would impact the delegates who might not be as interested to attend the leadership summit. So, it was a vicious circle.”



We were following the advice of the trusted organizations – Toronto Public Health, World Health Federation, and the federal government.

– Lauren Stewart



Stating in client contracts the chain of command for decisions in crisis management is important

Marie Lou Coupal CMP | Business Events Strategist, Marie Lou Coupal & Associates

“Business intelligence on the evolving market situation was important in order to make recommendations. The chain of command for both sides needs to be clear. It’s in our contracts. We need to know from the start: ‘Who’s the lead? Who has the last word? Who should we validate with? Who should be in copy to somebody?’ Try to have no grey area. That clear chain of command is really important.”

Chantel Beaupre | Co-Owner, Say Something Communications Inc.

“We’ve never had any risk or concern about where the chain of command lives. We’re always really, really clear – super clear in contracts. I don’t think there’s ever been a situation where we weren’t sure who to go to, or who was going to do what.”



After a proactive or difficult phone call, following up with an email creates something that may support legal action

Tracy Scanks | Owner/Executive Director, ProConference Advantage

“I’m picking up the phone first for those difficult conversations. It’s admissible when put in an email, but your tone and really trying to work together happens a little bit more when you’re having a conversation vs an email.”



Don’t move forward with any work without a signed contract

Chantal Montpetit CMP, CMM | Meetings, Director, Entrepreneurs’ Organization

“Some contracts were not signed. Often, we know the person, and perhaps they hadn’t signed, or we hadn’t signed. I think this will change in our industry moving forward.”

“

I’m picking up the phone first for those difficult conversations.

– Tracey Scanks

Pearleen Mofford CIS | Former Managing Director, Downeast DMC

“We still have clients that feel that they’re not going to pay for the planning services because our contracts are still sitting on their desks. We weren’t thinking that COVID was going to be that big of a deal in Eastern Canada, to be honest. We didn’t drop the hammer to say, ‘send us the contract or we’re going to release everything.’”



Customized Force Majeure clauses in contracts will be important moving forward

Chantal Montpetit CMP, CMM | Meetings, Director, Entrepreneurs’ Organization

“We knew that because the Force Majeure clause was not too detailed, but detailed enough that we could be out of it. The legal team was very sure about it.”

Karen Norris CMP | Conference Manager, Canadian Association of General Surgeons

“I would highly recommend that you source legal counsel yourself, if you don’t have it. This is not a decision that should lie on the shoulders of any executive director, or conference manager at all.”

Chantel Beaupre | Co-Owner, Say Something Communications Inc.

“Don’t always accept what is in the standard contracts that venues provide. If I had to teach somebody new in the industry, I think the most important thing is that you don’t have to accept those contracts, that they are subject to negotiation. I wish I had known that when I was young.”



Contracts with venues and suppliers are going to change – know how and what to negotiate moving forward

Chantel Beaupre | Co-Owner, Say Something Communications Inc.

“I think contracts are going to be hugely important moving forward. It’s essential to have a solid, balanced contract in place that allows you to recognize where your weaknesses are, where your strengths are, allows you flexibility, and allows you to build relationships. So, if you have a really solid contract, and a really good relationship with somebody at a venue, or a Destination Management Organization or Convention & Visitor Bureau, those things should be able to carry you through.”

“

Don’t always accept what is in the standard contracts that venues provide.

– Chantel Beaupre

Jessica White CMP | Director of Operations, KCI Management Inc.

“When we start revamping these Force Majeure clauses, we’re putting in as many conditions on the venue as possible from the planner side. My thing is to also think about what they are going to come back with to cover themselves. How do we meet in the middle and find a fair outcome? As much as I do want my client to get the most out of this, by enacting a Force Majeure clause, it really does impact the hotel. We want these partners to still exist when we start getting back to life.”

Leanne Calderwood CMP | VP Global Accounts, ConferenceDirect

“For all of our clients, this is an extremely stressful situation. Without knowing what’s on the other side, we need to soften the messaging between both parties, and find a win-win that is the best fit for both parties.”

Lynda Hoff CMP, CMM | Manager, Membership Education & Events, Ontario Nurses’ Association

“It’s going to be really interesting to see where we can go from here. Sometimes you feel that the contract is given to you, and you don’t have the power to negotiate terms, or change terms, depending on what sector you’re in. We’re going to have to figure out what that looks like from a planner point of view, and work with the people that do this on a regular basis, and are good at it. Making sure that our organizations are healthy, strong, and being responsible to our partners and ourselves in our fiduciary duties.”

Ruth Abrahamson | CEO, Base Consulting and Management Inc.

“We planners have to have that conversation with the hotel representatives. It’s going to be painful. Some people have some clients who have had to pay heavily for being on the pointy end of difficult contracts that were designed only with the hotel’s best interest in mind. Some of us had to wait until the very last minute with our hearts in our mouths, so that we could invoke Force Majeure or Impossibility. There has to be a better way. I think hotels and planners need to rethink and work together for change.”

“

We need to soften the messaging between both parties, and find a win-win that is the best fit for both parties.

— Leanne Calderwood
CMP

Tracy Scanks | Owner/Executive Director, ProConference Advantage

“One of the main messages that I am keeping in mind is that we’re all in this together. I want to book future business. We don’t want to have all this adversarial stuff between us. At the same time, people need to be very reasonable and look at what’s happening. What can we do? Where can we go with this? How can we best support each other?”



Communicating in times of crisis is of utmost importance – consider a communications professional

**Heather Reid ARCT, MSc and Heidi Wilker B.Comm., CMP Emeritus
Report Co-Authors**

If you are working independently (i.e., no team), or if the client doesn’t have a communications department, include a reliable communications professional in your toolbox.



One of the main messages that I am keeping in mind is that we’re all in this together.

– Tracey Scanks

Mental Health – Recognizing Its Importance

Incredible stress came from handling the massive responsibility of things like timelines, health and well-being personally and/or staff, finances, loss of work, self-isolation, setting up a home office, home-schooling children, and not knowing what the future holds. These influences very much affected peoples' mental health, and continues to do so as we write this report.

Here are reflections from the planners in regards to mental health:

Carly Silberstein *DES, CED | CEO, Redstone Agency Inc.*

"I think for anyone who finds themselves in this situation, you need to take a quiet moment, or five, or a day or two. I think it's time to check yourself – that is really key."

Claire Bélanger-Parker | *President, CNT Management Group Inc.*

"I've received a thank you for showing my vulnerability, for sharing how I'm dealing with my own personal stress. I've taken steps to handle my own personal concerns over what's happening. Things as simple as getting my papers in order, doing my will, communicating with five friends every day, or colleagues, or family members. Organizing a virtual family reunion every Friday night. By sharing my internal approach to my personal journeys through COVID-19, I've given them (the membership) permission to be vulnerable with me, and seeking out my help."

Constance Wrigley-Thomas *CAE | Owner/CEO, Essentient Association Management*

"The other thing I think I learned is that you cannot underestimate your own mental health through this. Our inner dialogue is going on and it's like 'holy cow, what am I going to do?' 'What about my family?' When trying to understand what is happening in the world, your mental health has to be protected and considered. Cut yourself a little bit of slack – if you can't figure it all out on day one, you'll get through it."

"Have conversations with people, too – what is everybody going through? Share with us. We're in isolation, but you have to reach out to people and have conversations."

Malak Sidky MHA, DES, HMCC | President, Health Care Event Planning
“I learned how to temper my disappointment. I was pretty devastated.”

Marie Zimmerman PhD | Executive Director, Hillside Festival

“Advocacy turns you into someone that isn’t necessarily you. I was either begging, or I was angry. The person I had become was somebody exhibiting a sort of temperamental exaggeration that I wasn’t really comfortable with. I did learn that people respond to stress differently. We’ve never been tested this way – a pandemic, the isolation, the almost apocalyptic vision of things. One staff member really surprised me with the effect it had on them.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“We had some people who were definitely experiencing sadness, or bordering on depression. If you are struggling, please reach out to someone who you trust and care about, who cares about you, more importantly.”

Sue Mercer | President, Step In Marketing & Event Solutions

“It’s the mental health of the association’s membership. I went to the incoming president and said, ‘I think we should have Peter do an ‘in the weeds’ webinar about how to deal with being overloaded too much’, because mental health is the most important thing right now. Whether their restaurant is shut down, or they’ve had to move to take-out and they’re overwhelmed, or how do they social distance – all of those sorts of things. It was the best attended session. All these people were asking questions in the chat box about what app to use to meditate.”

Tracy Scanks | Owner/Executive Director, ProConference Advantage

“I really found after a while that I needed to have a non-social media weekend, and not look at my Twitter, or my inbox. It was overwhelming to see so much disruption, destruction and panic, and to see how difficult it was for the people and industries dealing with it.”

“My mental health – I have to say, I was scared. I felt scared because I thought, ‘What am I going to do?’. The thing that keeps me going is all my travel. It helps me do the home office thing. With personal travel, site visits, and conferences, I’m often on a plane. This is the longest I’ve ever gone not travelling. That kind of hit me – there’s just these four walls. I did struggle for a while – it was the fact of feeling depressed. Now I’m starting to drag myself up, but I had to do some mental health things for myself.”

“

I learned how to temper my disappointment. I was pretty devastated.

– Malak Sidky
MHA, DES, HMCC

Event Planners Are Awesome!

We have been so amazed by all of the event planners that we interviewed. Our interviewees had lots to share about “being planners” as a whole, and about themselves going through this pandemic situation.

Chantel Beaupre | *Co-Owner, Say Something Communications Inc.*

“The amount of things we have to think about in terms of trying to protect delegates from undue hardship... That’s something that constantly plays in our minds.”

Jessica White CMP | *Director of Operations, KCI Management Inc.*

“Learn from your mistakes – figure out how to take this situation and grow from it. There are so many learnings that we can have to be more prepared. Start thinking about doing a deeper dive as to what could come up, as opposed to just living in the moment. As planners, we go, go, go, and don’t necessarily take the time to stop. Let’s pause and really start thinking about everything that could happen, could go wrong, and how we would jump in and rectify it. That’s how to make this pandemic a positive experience.”

Lauren Stewart | *Director, Conferences & Operations, BookNet Canada*

“This is the most incredible education I’ve had in years. I have never been so challenged every single day. I love that as a planner!”

Marie Lou Coupal CMP | *Business Events Strategist, Marie Lou Coupal & Associates*

“I’ve always said that my second in command, the whole team, and my floor team needed to be aware of what was happening. I was not holding everything in my head. That’s the hardest thing to do as an event professional – sometimes, it can’t be in your head. It needs to be known. If people have access to it, they have to feel comfortable, and step up for different roles.”

Marie Zimmerman PhD | *Executive Director, Hillside Festival*

“Planners are weird people – we’re hybrid people. We are very imaginative, but that means we can imagine the worst like nobody else!”

Michelle Planche CMP | President, Paradigm Events

“We can teach anyone how to plan, but what truly makes a good planner is moments like this. It’s when you have to take a plan that you’ve been working on for a year – and rip it up!”

“I think my instincts as a planner are decent. Ultimately, my intentions are always good. I will always put my clients first – definitely in front of myself.”

Mireille Faucon | CEO & Principal Planner, Events Par Excellence Inc.

“I always make the best decision for the client when it comes to what’s better financially, and what they need.”

“The way I approach my events is ‘this is my client’s event, not mine’. I’m behind the scenes, so if I make them look good, I’ve done my job. People are shaking their hands at the end of the event saying this was a great event – can’t wait to come to the next one. That’s when I’ve done my job.”

Nowshad Ali CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.

“In our work that we do as event planners and managers, we are guided by our values, and our ability to connect people, look at what they need us to do, unify, and certainly to demonstrate abundance thinking.”

“We are the experts. We tell people that we’re the experts. So, if we’re going to do that, we have to behave like experts. We have to give them good advice.”

“Come back to your sense of values. What are the things that ground you as a person and that when you started your event planning business that you wanted to achieve? What was going to guide you in your service commitment? Come back to that, and make sure you can honour that.”

Patricia Simpson | Manager, Marketing and Events, Canadian Council of Motor Transport Administrators

“As a planner, you plan out everything. You have a spreadsheet, or tracking mechanism for everything. We always look at every event and possibility. You’re prepared for whatever might come at you.”

“Trust your gut. There’s a reason why you do what you do. Trust your gut if it feels right.”

“

We can teach anyone how to plan, but what truly makes a good planner is moments like this. It’s when you have to take a plan that you’ve been working on for a year – and rip it up!

— Michelle Planche
CMP

Rita Plaskett CMP, CMM, VEMM | President, Agendum Inc.

“It’s interesting – you’re never prepared for this. But you learn that you don’t realize what kind of leadership skills you have until you’re put to the test. You put everything else aside and somehow, you are able to maneuver through.”

Tuesday Johnson-MacDonald CMP, CMM | Founder and President, TAP Resources

“As planners, it’s that sense that we go to problem solving right away.”



We noticed a number of themes that were repeated during the interviews. Here is a list of them:

- Calm
- Empathy
- Experience
- Leadership
- Patience
- Reaching Out to Others
- Relationships
- Resilience
- Working Together

We have posted video clips from our interviewees within each of these themes on our project website, plus other exceptional statements. Check them out at www.chroniclinglessonslearned.ca

We’ll round up this report with wonderful insights and silver linings from some of our interviewees:

Caroline Aston | Principal, Aston Events & Communications

“We’re all vulnerable in these situations, so very much. It does expose another layer of behavior and emotion. Where I see a benefit of that is with my clients. You get to understand them, individually, even more so – then you know more about how to work with them in the future, because you really understand a little bit more about what makes them tick. That’s what I love about clients – they’re all unique and have different needs. So, the more that I know about them, the more I can tailor my support of them, my experience, and my services to meet their particular needs.”



It’s interesting – you’re never prepared for this. But you learn that you don’t realize what kind of leadership skills you have until you’re put to the test. You put everything else aside and somehow, you are able to maneuver through.

— Rita Plaskett
CMP, CMM, VEMM

Chantal Montpetit *CMP, CMM | Meetings, Director, Entrepreneurs' Organization*

"I have a coordinator who works in the main international headquarter, and we do a coffee talk virtually on Zoom. I asked her if when we go back to normal, do you want to keep this going? She said, 'Oh, yeah'. It's more personal and it's sometimes difficult as a manager to establish those relationships. I really think that COVID helped us create this relationship that otherwise might not have happened."

Constance Wrigley-Thomas *CAE | Owner/CEO, Essentient Association Management*

"Hope is NOT a strategy."

Leanne Calderwood *CMP | VP Global Accounts, ConferenceDirect*

"I think, overall, the hotel industry has done an incredible job of managing this situation – the amount of things that they've had to learn has been more than I've had to learn."

Nowshad Ali *CFRE, CPBA, CPVA | President & CEO, On Purpose Leadership Inc.*

"Keep your head up – it's the only way to see the horizon and know for sure that it's there, especially when you're too close to recognize it."

"Be mindful of your emotions. Whether it's times of calm or times of chaos, we have two major human emotions that are at play – fear and hope. You need to recognize and respect fear, but what you need to do with it is allow it to drive your caution and preparedness. How do I know that I can have sure-footedness when I step? That's caution and preparedness. But you also need to have that hope, and allow hope to drive you to the future that you desire."

"Don't become immobilized by fear and anxiety. Be the bright light – the high frequency, not the low frequency!"

"Whatever your belief system is, you need to be able to go back to those belief principles, because they will definitely support and guide you. Especially during the more tumultuous and chaotic times – we have to have those foundational elements, as they are critically important."

“

Keep your head up – it's the only way to see the horizon and know for sure that it's there, especially when you're too close to recognize it.

– Nowshad Ali
CFRE, CPBA, CPVA

Rita Plaskett *CMP, CMM, VEMM* | *President, Agendum Inc.*

“Organizations, people, don’t realize the value of a third-party planner until you end up in a situation like this. There’s a lot of value for what we bring to the table.”

Stewart Hall | *President, Rock the Stars*

“Professional means to me being timely, honest, warm and compassionate. All of those things.”

“As bad as things may look, they’re not as bad as you think they are. You have to take that attitude into a situation like this. There’s so much worse elsewhere in the world.”



We were extremely impressed with the number of people who, through their professional integrity, were helping others with no financial compensation – now that’s going above and beyond!



What a privilege it has been for us to have spent the time listening and learning from these 38 event professionals! We truly hope that this report will be of assistance to the Canadian events industry for future situations.



Professional means to me being timely, honest, warm and compassionate. All of those things.

— Stewart Hall

Resources

These are specific resources referenced by some of the interviewees:

Canadian Association of Counsel to Employers
(COVID updates for each province)
www.counseltoemployers.ca search under "Resources" tab

Event Safety Guide
www.eventsafetyalliance.org/the-event-safety-guide

Meeting Escrow
www.meetingescrow.com

On Purpose Leadership – Achieving Success through VUCA

VUCA²

V = vision and values

U = understanding and unity

C = clarity and connectedness

A = agility and abundance

VUCA³

V = vision and values and volatility

U = understanding and unity and uncertainty

C = clarity and connectedness and complexity

A = agility and abundance and ambiguity

<https://onpurpose.ca/2020/04/25/achieving-success-in-a-vuca%C2%B2-environment-webinar-replay>

Power Mill Corporate Event Solutions (for risk management)
www.powermillsolutions.com

COVID-19:
CHRONICLING THE LESSONS LEARNED
in the Canadian Events Industry

www.chroniclinglessonslearned.ca

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