

How to plan an EDSO event

Have you heard about a restaurant that you've wanted to try? Do you have a neighborhood favorite that you really like? Maybe they'd be good candidates for an EDSO event.

Arranging an event is not difficult and can be fun. The first thing to do is to try out the place if you haven't eaten there before. Invite an EDSO friend to join you at a trial dinner.

Think about these questions:

- Is it fun/good food/nice atmosphere or some combination of all three?
- Is the restaurant large enough for a group? Would a group of 15-25 EDSO friends fit in the place?
- How expensive is it? Many restaurants have their menus online and you can get a good idea of options/costs there. Most places will allow you to take a menu home with you if you're planning an event; just ask. Make sure you look at dinner, not lunch prices. Remember to include a tip when estimating costs.
- Do they want to handle groups? Many popular places don't take reservations and some will require you to rent the entire restaurant on a normally closed night to have a private party.

You've checked it out, the food tastes good and it looks like fun so here's how to arrange it.

The Event Agreement – Sometimes called a contract, the event agreement is not a legal document. It is merely a form we use to capture the details of what we and the restaurant manager have agreed upon. It's very common for the details of whether or not coffee is included, for example, to be lost between the planning time and the night of the event. Always take 2 or more blank forms with you to the meeting with the manager. You can fill out items such as restaurant name, address, phone number, etc before the meeting to save time. Also take a note pad along to take notes during the discussion. After the discussion is complete, fill out one copy of the event agreement, making sure to include all the details of the event. Sign it and get the manager to sign it. They can usually make a copy of the agreement for you. If not, just fill out a second copy of the agreement and leave it with the manager. The event agreement is available on the EDSO website at <http://www.edso.info/forms.htm> .

When it's completed, many folks will need different information off the event agreement. The Site Selection chair and the President need copies, as do the Treasurer, the newsletter editor, the Secretary who does the email reminders and the reservations person. If you can, scan the agreement and email it to these folks, or just mail it to the Secretary and I'll scan it and email it to the board.

A Typical EDSO event:

Arrival/meet & greet – We usually arrive 30 minutes before we actually sit down to dinner to give us time for people to gather. It's nice to have bread and/or appetizers on the table for this but not absolutely necessary. We do want to avoid having all the bread/apps eaten by the early arrivals before the last folks arrive. To avoid traffic we've recently started scheduling arrival at 6:30 PM and dinner at 7:00 PM

Meal – Most EDSO members are not looking for a huge meal or enormous portions (can you say Izzy's or Hometown Buffet), but rather an enjoyable experience and adequately sized interesting foods.

Starters - It's nice to have a starter of some sort. Soup, salad and appetizers are all good for this course. If you're trying to limit costs, a cup of soup or a smaller salad can sometimes trim a dollar or two. Make sure that you know if bread and butter/olive oil will be served with the meal or available before and if there is an additional cost.

Entrees – Some foods lend themselves to family style servings (Asian foods, pastas, stews, pizza, etc.); others like chops, steaks, sandwiches, etc. are better served plated. Think about this and discuss it with the manager. Family style is usually easier for restaurants and good for seconds, etc. but we do need to ensure that there is enough for everyone to get a fair share. With plated dinners that's not a concern.

If we're having people choose their entrée before the event, we usually offer 3 (or more) choices. We currently have no strict vegetarian/vegan members so there is no requirement to offer a vegetarian choice. We commonly offer a seafood, meat and poultry choice but it really depends on what's good at the restaurant. Again, listen to the recommendations of the manager - they'll know what people like. Offer to provide the number of each entrée choice a few days before the event, when you provide them the final number of dinners. Do try to provide the number of dinners to the restaurant a few days before the event but try to not have it a week or more out. Also, try not to have a reservation cut-off date in the first few days of the month as folks may not have read their newsletter by then. There usually isn't a requirement to provide starter/dessert choices days before but we can do that if required.

It's common for some restaurants to change their menus monthly or at least seasonally and we are usually planning 3 months out. We still need to select a menu when we're arranging the event. We understand that the menu details may change. They'll usually know which items remain on the menu from month to month, and while they may not know, for example, if they'll have fresh halibut on the menu in 2-3 months, they will probably know that they will have fresh salmon instead. They may switch from a hangar steak to a flank steak. If we must we can specify "fish of the day" or steak and not specify what type of steak. If we end up with changes from what we've already put in the newsletter we can always notify members through the next newsletter or in the email reminder.

Dessert – Many folks enjoy a small something sweet at the end of the meal and others will refuse dessert, even when it's included. Desserts at many restaurants these days seem to be sized to share and priced at \$7-9. If you're trying to cut costs, consider not including the dessert or preferably, arranging for a smaller or half-sized dessert to be included for a lower cost.

Coffee, tea, drinks, etc. – Ask the manager about throwing in coffee, tea, soft drinks, etc. with the meal. If the manager doesn't want to include these for free do not add costs for them to the meal. Recent experience has shown that a small minority of folks will order coffee or sodas even when they are included. If they will cost diners extra make sure that is clear in the newsletter write-up.

Wine, beer, cocktails, etc. – About half of the EDSO members will probably have wine with their meal, depending on the restaurant. Take a look at the wine list if they have one. Do they offer only red/white /rose or do they have many wines listed? Do they serve wine by the glass as well as by the bottle? Does the pricing seem reasonable? Are there some options under \$25 a bottle or do they start at \$30-40 a bottle? Do they have a full bar, specialty cocktails, a good beer selection, etc.? This info should go in the newsletter write-up. Be sure to ask about any corkage charge as a number of EDSO members may prefer to bring their own wine.

Costs and payment – We charge our members a single cost per event, including gratuity, regardless of what entrée they order. We much prefer to pay the restaurant a single amount per diner plus gratuity. For example, this means that when we offer steak (\$17), salmon (\$18) and chicken (\$14) we'd probably settle on a cost around \$17 or so for the entrée as we figure a price for the meal. If everyone ordered steak we'd get a small break; conversely, if lots of folks ordered chicken the restaurant would get a good deal. Most restaurants are willing to do this to accommodate a group, especially since we give them the number of diners and entrée choices a few days before the event. We'd really rather not have the final cost based on adding up various entrees at menu prices. Don't be afraid to negotiate with the manager. Ask for small salads, half sized desserts, etc. to reduce the price. Make sure that the gratuity has been calculated and included in the final amount we agree to pay the restaurant. If they don't have a mandatory amount that they charge for groups I suggest 18%. Don't forget to include sales tax for events in Washington.

This is a good time to make sure that the manager knows that we expect people to order wine, beer, etc with their meal and that those checks are to be individually presented to the diner along with any other extras that are not included with the meal (dessert, coffee, etc. if not included). Some restaurants will automatically add a gratuity to these bills, so diners will need to know. We'll pay with a single EDSO check for all the meals. If for some reason the restaurant will not take a check, the Treasurer usually can pay with a debit card.

Event Agreement price versus newsletter price – You may have noticed that the event agreement price that you negotiated with the restaurant is not necessarily the price that we show on the newsletter and that there is sometimes a different price for members and non-members. There are a couple of reasons why this happens. First, we always pay the restaurant the exact price per diner that you and the restaurant agreed to. If you negotiated a price that is not an even dollar amount we may round the price to an even dollar amount for the newsletter. Also, we charge non-members a \$2 surcharge in order to encourage folks to join EDSO rather than just attend events as a non-member. Additionally, when we have sufficient money in the EDSO Treasury, we provide a member discount. The amount of the discount is determined annually by the Treasurer, usually at the January board meeting.

While we don't encourage this type of event, occasionally it may be appropriate to order off the menu at the restaurant and for each diner to pay their own bill. Should you plan such an event, there is a method to pay the member discount if the event planner wants to. The event planner will need to bring sufficient cash to the event to pay each member the discount and then the event planner can claim reimbursement from the EDSO Treasurer.

Planning Details:

When to start planning the event - We advertise our events in the monthly newsletter and want to give folks enough time to plan ahead. Our newsletter is finalized during the last week of the month. That means that we'll usually need to finish planning for an event about 2 months prior in order to get it into the newsletter the month before it happens. Most restaurants don't plan very far ahead, so planning an event 2-3 months out gives them lots of lead time.

Making contact with the restaurant - Ask at the restaurant to find out whom you should talk to in order to arrange a group event. Call them (not during lunch or dinner timeframe) and ask when you could meet with them to discuss a group event. Mid morning works best for some folks and mid afternoon is good for others. They are usually too busy to meet during lunch or dinner. It's important to meet face to face in the restaurant and not try to arrange the event entirely over the phone. You can probably get an EDSO Board member to accompany you to talk to the manager about an event; just ask.

Do your homework before the meeting - Go to this meeting having an idea of when you'd like to have the event and what items you'd like to see on the menu. It also helps to have a target cost in mind. We host events that are "haute and not so haute". Know where you want to end with your cost – it's very easy to add starter, entrée, dessert and tip and be well over \$40 without even having a high priced entrée.

Size of event – The first question most managers will ask is "how many people are we talking about". I'd suggest that you plan for 15-20, possibly 25. This is an important time to establish if there is a maximum (or minimum) number of diners for the event. Feel free to plan an event with a limit on the number of attendees. Nobody is happy if everyone is crowded and service is too slow because we tried to cram in a few more folks than comfortably fit in the space allowed. Ask the manager when they'd like to know how many people are coming. Again, it is better for us to have the notification date be a few days prior to the event and not a week or more before. Our cut-off date for reservations is usually the day before you call the manager.

Date – You'll know in what week you'd like to do the event. We usually let the restaurant influence the specific date of the event. We're happy to come in on a day that is normally slow for them. This makes it easier on the restaurant and results in better service for us. That normally means that we end up on a Tuesday – Wednesday – Thursday. Please note that a number of EDSO members also belong to the Portland Wine Tasters Guild which meets on the last Tuesday of each month. If you can, please try to not schedule an EDSO event on that day.

Starting time – We commonly sit down to dinner at 7:00 PM. Consider rush hour traffic and the fact that folks will be traveling from all over the metro area when you set the starting time, sometimes later may be better. We usually tell people to gather for a no-host bar about 30 minutes earlier

Now that I've arranged for the event, what's next?

When you filled out the event agreement, you chose a reservation cut-off date so you had time to notify the restaurant of the final number and entrée choices if required. After the cut-off date you should contact the EDSO reservations person to get the details of who is coming and entrée choices if required, and pass them to the restaurant. This is also a good time to re-confirm details with the restaurant. It's not uncommon for management to have changed at the restaurant or for the details of the event to have been misplaced. It's good to re-confirm over the phone to make sure everyone has the details.

You may get a call with a cancellation or addition request after you've notified the restaurant of the final numbers. Contact the restaurant and reply to the EDSO member. The restaurant can usually react up to the morning of the event and they really appreciate the advance notice rather than finding out when the tables are already rearranged, meals prepped, etc.

Dietary restrictions – We do have a member who prefers not to eat red meat. Diners should indicate when they make their reservation if they need a special entrée. If we need to ask the restaurant for a special meal, most places will accommodate the request with no additional charge. If it costs a few dollars extra, EDSO will foot the bill.

When you show up at the event – Please arrive a few minutes early, check in with the manager and make sure that the area set aside for the meal is what was agreed upon. Make sure that the number of places set on the tables and the number of expected diners match. Feel free to ask the restaurant to add a table or two if it looks like we're really cramped.

I suggest that you reconfirm with our assigned server that we're getting a single check for the meals and separate checks for individuals who order wine or other extras. It might be nice to know if they automatically add a gratuity to the individual checks for wine, etc.

If we're having appetizers to be enjoyed during the meet and greet time, make sure that they are not brought out too early. It's common for people to arrive early and if the restaurant starts serving appetizers when the first folks show up, they can all be gone for the diners who arrive at or shortly after the published gathering time. It's probably best to hold off on serving appetizers until the published time.

As people arrive, you should work with the server as to when we should get folks to sit down. You'll need to decide whether to delay starting the meal for a few minutes if dining time arrives and we're still missing a few diners. You'll also need to coordinate with our server about adding spaces if unexpected diners arrive (or else send them away – definitely not the preferred solution). Please indicate to the server who should get the EDSO bill for the meals, usually the

Treasurer. It's always good to have a copy of the event agreement with you in case there are questions about the bill.

This document might seem long but it covers the items on the Agreement with various situational scenarios. This will give you the confidence to talk to the manager. It's even more fun when you take an EDSO friend with you – and have a snack while you're there. Thank you for arranging your EDSO event!!

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