

Best Practice Guidelines

August

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This best practice document outlines the responsible working practices followed by all professional and high profile wedding and event planners. Those signed up to the best practice register are making a promise to live by these recommendations and in doing so build up trust between themselves, their clients and the event planning industry as a whole.

for Wedding
Planning & Event
Management
Professionals

BEST PRACTICE GUIDELINES FOR WEDDING AND EVENT PLANNERS

Introduction

The purpose of this document is to inform, to protect and to advise. It is not the law although many aspects have been based on British law and good practice from a range of consultancy businesses. You should aim to operate by these guidelines if you wish to become or remain a member of any reputable wedding planning or event planning society or association.

It is purposely fairly broad to allow an element of discretion to be exercised by each planner. To help you decide what is within the remit of the guidelines and what is not we ask you to put yourself into the mindset of the client, supplier and general public and imagine what they would make of your actions and whether they would regard your actions to fall in with these guidelines.

This document does not go into the minutia of wedding and event planning, nor is it a training document. It should be used as a guide when formulating your own practices and policies.

Applications to join the 2014 best practice review committee can be made to the current committee chairman Mrs. Amber Hunter care of admin@theweddingplannerschool.org.uk by December 2013.

Ethics Policy

All wedding and events planners, whether in-training, part trained or fully qualified to the highest levels, are expected to conduct themselves in a professional and ethical manner. Not only does this provide protection to the clients and employers they work with but protects suppliers and the planners themselves.

Guidelines for ethical practices are as follows:

- ◆ Advertising and marketing literature should not be misleading. Planners should be able to back up all claims with evidence
- ◆ Fees should be fair and clearly documented and not exceeded without client agreement
- ◆ There should be no copying (plagiarism) of another business or individual's work
- ◆ Planners should not engage in harmful espionage and intentional wasting of competitors' resources
- ◆ Planners should declare to clients when commission is received from suppliers. Any conflict of interest between client, planner and supplier (e.g. if the planner owns shares in a recommended supplier's company) should also be declared
- ◆ Suppliers and venues should be treated fairly and with professionalism and should be paid on time according to your written contracts
- ◆ Planners will refrain from slander or libel of competitors, clients and suppliers. Any commentary should be supported with evidence

- ◆ Planners should not discriminate against suppliers or clients solely on the basis of age, gender, sexuality, race, disability, religion or culture

Guidelines for good practice

Fees & Payments

Fees should be clearly stated in writing to all clients. The products and services those fees incorporate should be listed and any exclusions clearly stated.

Fees should be based on calculations the planners have conducted based on their expenses, salaries, chosen profit margin, market forces and time available.

To avoid the risk of money laundering occurring with or without the planners consent, planners should avoid receiving large sums of client money into their own bank account for payment onward to suppliers.

Clients should make payments to suppliers directly, with some guidance from their planner to ensure that the correct amounts are paid at the correct time.

Payments of £1000 or more made in cash may cause alarm and should be politely declined at your own discretion or in line with the current HMRC rules. Likewise, any payments or transactions which cause the planner to become suspicious should be kept documented and where necessary reported to the appropriate authorities.

Contracts

Written contracts should be supplied to every client except where an immediate direct exchange of goods for cash occurs.

Contracts should include product or service information, fees, payment schedule, discounts and exclusions.

Terms and conditions should apply to every transaction.

Terms and conditions should at the very least include a cancellation and refund policy, disputes policy, force majeure policy and legal jurisdiction in line with current selling laws.

Contracts, terms and conditions can be drafted by the planner and shown to a contract solicitor to check for clarity and legal ambiguity.

Suppliers

Suppliers should be treated with courtesy at all times. Should a disagreement arise it is good practice to speak with the supplier concerned face to face before launching any legal action or public complaints.

If a supplier's product or service is not as described, the planner should inform the supplier and act to rectify the situation immediately rather than waiting until after the event to try to obtain a refund.

It is recommended that every transaction or agreement with a supplier is documented, complete with a copy of their terms and conditions, cancellation policy and receipt.

Planners should verify the identity and standards of the supplier in person where possible to prevent fraud and protect the client.

Suppliers should be paid on time in accordance with the contracted agreement. It is good practice for planners to explain to their clients who may be responsible for making payments, the reasons why paying on time is mutually beneficial.

Negotiations with suppliers are encouraged but should be conducted in the best interests of every party. Planners should not force suppliers into unsustainably low-prices or put suppliers' businesses at risk with threats of bad press.

Marketing

Planners should take an ethical approach to marketing by not making false claims.

Adverts, websites, articles and other literature made public for marketing or sales purposes should be your own original work or that of a commissioned agent.

Planners should avoid referring to their own wedding and events in marketing and sales literature if they wish to operate in a professional sphere.

Confidentiality

Clients' personal information, financial records and event plans should be kept entirely confidential unless otherwise notified by the client.

Planners should take extreme care to ensure that sensitive information, client profiles and payment information under kept under lock and key and are destroyed safely when no longer required.

Insurance

Planners should avoid making a recommendation about which wedding or event insurer clients should use unless the insurance forms part of the primary contract and terms and conditions between the client and the planner and the insurer is fully disclosed.

No financial advice with regard to the buying and selling of shares or any other financial products should be given to clients unless the planner has the relevant financial qualifications to do so.

We advise planners to recommend that clients obtain wedding or event insurance for the protection of all parties. This should be brokered by a qualified independent party, or the client.

Planners should hold public liability insurance to at least £1m (£5m if large-scale events). It is recommended that planners retain these documents for a minimum period of 40 years regardless of more lenient government guidelines.

Planners may choose to take out professional indemnity insurance.

Planners who have staff, contractors or volunteers MUST obtain employers liability insurance. The policy document must be displayed in a prominent place and copies kept on file for a minimum of 40 years.

Health and Safety

Planners should be aware at all times of their responsibilities relating to health and safety at all times during the planning, execution and breakdown of events.

Planners should aim to eliminate risk where possible, reduce risk where elimination is impossible, inform people of remaining risk and inform parties who have a shared responsibility to act on a hazard and control risk where it is intrinsic.

Planners who discover suppliers unwilling to comply with health and safety protocol should inform their association, college or body so that other planners are fully informed about whether to work with that supplier.

Handling Disabilities

Planners should make reasonable adjustments where required to ensure that events are accessible to people with a full range of disabilities in accordance with the Equalities Act 2010.

Persons with disabilities or learning difficulties should be shown the same high standards of care and consideration as able bodied guests and clients and not made to feel as though they are problematic because of their disability.

Financial Affairs

Planners should refrain from making unrealistic budget plans. Planners have a responsibility to be honest with clients about what level of service or product they can expect from each supplier within their budget.

Planners should not encourage clients to take on debt in order to fund their event. If the client wishes to do so without advice this is acceptable. However for the planner's own protection it must be made clear to the client that the planner accepts no responsibility for the client's financial affairs (except where profits and tickets sales form part of the agreement).

General Good Practice

Planners should prioritise the minimisation of risk and failure at every stage of their plans.

Planners should maintain a contingency plan in case they are taken ill immediately before or during an event. Records of each event and the planner's required actions should be so clear that a suitable replacement could take over the plans without consultation.

Likewise, planners should ensure that suppliers have an adequate contingency plan should disaster or delay occur.

All reasonable steps to be taken to ensure that suppliers are able to perform their service or create their product according to the standard agreed. This includes informing them of changes in writing, giving adequate notice, providing adequate directions and timescales and verifying information on a regular basis.

Good financial records should be kept and maintained at all times, both with regard to client budgets and business finances.

Payments due to HMRC should be made promptly and accurately.

Planners should not offer to look after minors or vulnerable persons at events unless their insurance covers such activities and the clients have conducted an advanced CRB disclosure check (or equivalent) on him or her.

Planners should aim to demonstrate creativity and originality in their event design rather than copying existing event formats and themes

Planners caught in the middle of family disputes or co-client disputes should exercise caution when attempting to resolve disagreements. Being seen to take sides early on in a disagreement, (particularly the side of the person who is not the paying client), may be deemed disloyal by clients.

Meetings and operations should be conducted in a way that makes every party feel as though they are being listened to.

Planners should maintain and promote an environmentally and socially responsible model of operation where possible.

Planners should keep up to date with changes in legislation that affects them. This extends to financial legislation, marriage law, business practices and health and safety guidelines.

Planners should evaluate every event afterwards and keep the evaluation notes on file for future use.

Planners should encourage feedback from clients, both positive and constructive in order to develop and improve.