

Conference Planning: Tips, Tools, and Tricks for a Successful State Conference

**2013 NAEA NATIONAL
CONVENTION
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Mission *Impossible!*



Virginia Style

- In Virginia there is a team approach to the conference planning. There are 5 regions in VA and each takes a turn to be the host region for a conference. The regional president is part of the planning team.
- The elected Vice President of the state is the conference coordinator.
- The executive secretary (only paid position in VAEA) is a VERY important part of the team. She takes care of contracts and communications.
- Conference and hotel liaison (who is paid by the hotel).
- Website designer, keeps the membership informed through the website and links to hotel and registration.
- **Our philosophy is to have more involvement in all aspects of the conference because it creates ownership and builds potential leaders.**

Conference Planning Handbook

- Defines roles of Chair and Committee Members
- Know your role – can you sign contracts on behalf of association
- Leading - frequent “touch backs”
- Other duties as assigned

Virginia's Conference Coordinator Duties

- Collect evaluation data from previous conference.
- Create proposal request form on line.
- Collect proposals and inform presenters that they have been received.
- Attend pre conference hotel visit with the team.
- Communicate with conference committee through email and in person.
- Schedule the conference presentations with the help of the team.
- Work at conference to answer questions and be available for any needs.
- Create forms for current conference evaluation as well as session evaluation.
- Prepare a report for the state board during the January Retreat.
- Communicate evaluation results with previous year's presenters.

Site Selection

- 2, 3, 4 years out
- Convention and Visitors Bureau
- Leveraging hotel relationships
- Multi-year strategies
- RFP – Concessions up front!

Site Selection - RFP

- Who you are
- Past meeting attendance and dates
- Preferred dates and pattern of meeting
- Room block needs (sleeping rooms and meeting space)
- Exhibitor space needs
- F&B needs
- Concessions

Conference Hotel Liaison

- Communicates with different hotels in the region where the conference is to be held. Checks on specific dates requested.
- Attends a pre-conference visit with the conference committee to check out the hotel site.
- Translates conference “hotel-speak” to English for conference planners.
- Reviews all BEO’s and conducts the pre-conference meeting with the hotel staff.
- Attends conference and deals with hotel issues.
- Attends the final meeting at the conference where conference expenses are reviewed.

Conference Budget

- Know your budget inside and out; meet with Secretary-Treasurer/Bookkeeper
- Review actual revenue and expenses from prior year



Sample Conference Budget

ART EDUCATION ASSOCIATION

FY2011 Approved Budget

Convention - Pittsburgh

	Audited	Approved	Actuals
	FY2010	FY2011	FY2011
	Actuals	Budget	YTD
Income			
503 · Active-Earlybird Registration \$100	\$ 18,000	\$ 8,500	
504 · Spouse/Guest-Earlybird \$49	588	539	(1)
505 · Student - Earlybird \$45	1,350	1,440	
506 · Retired-Earlybird \$90	450	2,880	
507 · Non-Member-Earlybird \$95	1,875	950	
512 · Active Onsite Registration \$135	4,860	3,105	
513 · Spouse/Guest Onsite \$69	345	690	
514 · Student Onsite \$60	2,100	2,940	
515 · Retired Onsite \$110	330	770	
517 · Non-member Onsite \$165	1,320	1,155	
541 · Ticketed Meals/Luncheons	2,780	2,700	
542 · Tours	990	750	(2)
570 · Exhibit Tables	1,300	1,200	
575 · Sponsorships	<u>1,100</u>	<u>850</u>	
Total Income	\$ 37,388	\$ 28,469	\$ -

Attendance - History

Lancaster

Philly 10	09	Poconos 08
90	85	73
12	11	10
45	32	30
5	7	2
15	10	12
36	23	33
5	10	7
35	49	36
3	7	2
8	7	5
254	241	210

Sample Conference Budget

Expense			
828 · Ticketed Meal/Luncheons	\$ 3,125	\$ 2,591	
831 · Tours	750	630	
810 · Convention - printing	2,400	2,750	
811 · Convention - PSD	990	730	
821 · Hotel Expenses	13,250	14,110	
824 · Honorariums	350	1,000	
825 · Travel	250	175	
Total Expense	\$ 21,115	\$ 21,986	\$ -
Net Income	\$ 16,273	\$ 6,483	\$ -

Food and Beverage				
Event	# of People	F&B	Tax + Grat	Total
				\$
Breakfast	75	19	24.9185	1,868.89
Break	50	11	14.4265	721.325
				\$
				2,590.21

Hotel Expenses	
Speaker Rooms	
Space Rental	
AV	

Creating the Program

- Creating a conference theme
- Using past evaluations
- Getting proposals (Google Docs)
- Scheduling presentations
 - Competing presentations
 - Water sources
 - Limit size of session
- Finding a Keynote

Speakers

- Finding speakers
 - Prior year evaluations; leverage connections
 - *Leadership Link*
 - Recommendations from audience
- Speaker Contracts
 - Specific dates, times, AV available
 - I agree to comply with all program related policies and procedures
 - Rights to photograph, videotape
 - No promotion of personal business
 - Cancellation rights, if any
 - Reimbursement rights, if any
 - W-9 (if over \$600 honorarium)
 - Samples available



Hotel Negotiations and Re-negotiations

- First rule: Everything is negotiable! Creativity flourishes!
- Know your meeting
 - Walk through is important
 - Signage
 - Room size needs
 - Flow of traffic
 - Think outside the hotel
- Latest trends in hotel contracts
 - Free internet in sleeping rooms
 - Complimentary room nights for every 50 room nights

Hotel Negotiations cont'd

- Complimentary suite for your President or VIP
- Guaranteed lowest rate on property
- Room review and pick up reports
- Rob Peter to pay Paul rule
- Confirming your rates, walk policies, and cut-off dates
- Work towards no or low food and beverage minimums
 - Need to plan a big event – have hotel help finance it!
- Attrition and Cancellation Clauses
- Review periods and room releases
- AV equipment
- BEOs

Sponsors

- Finding sponsors
 - Think global and local
 - *Leadership Link*
 - Recommendations from audience
- Sponsor *Ask*
 - What's in it for them?
 - Exposure to your audience
 - Who are the attendees?
 - Why do they need access to your attendees?
 - Signage, newsletter, promotional materials
 - Tax deductible

Budget Savers

- Be a piggy backer
- Put your partners to work
- Meet the chef ask for seasonal foods
- Tell them your budget
- Skip the soda – eco-friendly savings
- Rob Peter to pay Paul
- Use CVBs

Setting Your Meeting Apart

- Two most popular words people love to hear!
- Personalize your message
- Handwriting on envelope
- Answer “what’s in it for me?”
- Visual elements; photos from previous events
- Testimonials
- Using your existing mediums
- Linking to other sites like NAEA
- Speaker promotions



Getting The Word Out

- Postcards, mailers, newsletters
- Early bird rates
- Your state association website
- Working with your partners
- E-blasts – strategize!
- Inserts
- Promotion for next year's event AT this year's conference (save the date, conference program)

Registration and Results

- Online registration systems
- Collecting registration fees: pre-registration and on-site
- Gathering Feedback
- Make the Case!



Your planning will make a lasting impression

Thank you!

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Welcome to YOUR *Mission Possible!*