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

2015 NAEA National Convention
MARCH 27, 2015

Melanie Dixon, NAEA
Mission *Impossible*!

I’m Chair – Now What?
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
• Document everything!
Sample Conference Chair Duties

• Collect evaluation data from previous conference.
• Create presentation/proposal request form.
• Collect proposals, work with committee to identify content/sessions, and inform presenters that they have been received.
• Attend pre conference hotel visit.
• Communicate with conference committee through email and in person.
• Schedule the conference presentations in collaboration with committee.
• 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.

Communicate evaluation results with previous year’s presenters.
Site Selection

- Seller’s Market!
- 2, 3, 4 years out – may only allow 18 months
- Multi-year strategies
- Room rental fees and F&B minimums
- Convention and Visitors Bureau
- Leveraging hotel relationships
- RFP – Concessions up front!
- Pick 2 – 3 hotels to focus on
Site Selection - RFP

• Who you are
• Past meeting attendance and dates (5 years)
• Preferred dates and pattern of meeting
• Room block needs (sleeping rooms and meeting space) – double/double
• Exhibitor space needs (15 table tops)
• F&B needs
• Concessions
Conference Budget

- Know your budget inside and out; meet with Secretary-Treasurer/Bookkeeper
- Review actual revenue and expenses from prior 2 – 3 years
Sample Conference Budget

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

Attendance - History

<table>
<thead>
<tr>
<th>Location</th>
<th>2010</th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philly</td>
<td>90</td>
<td>85</td>
<td>73</td>
</tr>
<tr>
<td>Lancaster</td>
<td>12</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Poconos</td>
<td>45</td>
<td>32</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>15</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td>36</td>
<td>23</td>
<td>33</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>10</td>
<td>7</td>
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<tr>
<td></td>
<td>35</td>
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<td>7</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>254</td>
<td>241</td>
<td>210</td>
</tr>
</tbody>
</table>
## Sample Conference Budget

<table>
<thead>
<tr>
<th>Expense</th>
<th>Charge 1</th>
<th>Charge 2</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>828 · Ticketed Meal/Luncheons</td>
<td>$3,125</td>
<td>$2,591</td>
<td>$534</td>
</tr>
<tr>
<td>831 · Tours</td>
<td>750</td>
<td>630</td>
<td>$120</td>
</tr>
<tr>
<td>810 · Convention - printing</td>
<td>2,400</td>
<td>2,750</td>
<td>$350</td>
</tr>
<tr>
<td>811 · Convention - PSD</td>
<td>990</td>
<td>730</td>
<td>$260</td>
</tr>
<tr>
<td>821 · Hotel Expenses</td>
<td>13,250</td>
<td>14,110</td>
<td>$860</td>
</tr>
<tr>
<td>824 · Honorariums</td>
<td>350</td>
<td>1,000</td>
<td>$650</td>
</tr>
<tr>
<td>825 · Travel</td>
<td>250</td>
<td>175</td>
<td>$75</td>
</tr>
</tbody>
</table>

**Total Expense**

<table>
<thead>
<tr>
<th>Charge 1</th>
<th>Charge 2</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>$21,115</td>
<td>$21,986</td>
<td>$871</td>
</tr>
</tbody>
</table>

**Net Income**

<table>
<thead>
<tr>
<th>Charge 1</th>
<th>Charge 2</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>$16,273</td>
<td>$6,483</td>
<td>$9,790</td>
</tr>
</tbody>
</table>

### Food and Beverage

<table>
<thead>
<tr>
<th>Event</th>
<th># of People</th>
<th>F&amp;B</th>
<th>Tax + Grat</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>75</td>
<td>19</td>
<td>24.9185</td>
<td>$1,868.89</td>
</tr>
<tr>
<td>Break</td>
<td>50</td>
<td>11</td>
<td>14.4265</td>
<td>721.325</td>
</tr>
</tbody>
</table>

**Total**

<table>
<thead>
<tr>
<th>Charge 1</th>
<th>Charge 2</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,590.21</td>
<td>$2,590.21</td>
<td>$0</td>
</tr>
</tbody>
</table>
Creating the Program

• Creating a conference theme
• Using past evaluations
• Scheduling presentations
  – Competing presentations
  – Water sources
  – Limit size of session
  – Room sets
• 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)
Hotel Negotiations and Re-negotiations

• First rule: Everything is negotiable; but... it’s a Sellers Market
• Show your history
• Know your meeting
  • Walk through is important – change up the space needs!
  • Room size needs
  • 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
• Keep space at a minimum – F&B in meeting rooms
• Confirming your rates, walk policies, and cut-off dates
• Reduce food and beverage minimums and room rental fees

• Attrition and Cancellation Clauses
• Renovations – must inform w/i 10 days of knowing
• Review periods and room releases
• AV equipment
• BEOs
Budget Savers

- Be a piggy backer
- Meet the chef ask for seasonal foods
- Tell them your budget
- Plates and pasta
- Skip the soda – eco-friendly savings
- Rob Peter to pay Paul
- Gift cards
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
- Raffles
- 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)
Your planning will make a lasting impression
Thank you!

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Welcome to YOUR Mission *Possible!*