

Congratulations!

So, you've volunteered (or had your arm twisted) to host a conference. There will be lots of hard work, but the experience can be very rewarding. The following are some guidelines, based on the experiences of the Valley Forge committee. Some names are listed at the end, in case you'd like to contact them for additional information.

General

The amount of planning, committee work, advance deadlines, etc., in part depends on the size conference you are planning.

For example, to host one the size of our Pioneer Group meeting, you should start *before* the conference preceding yours. Get involved with the conference hosts and attend the conference, and you'll come away with lots of useful experience.

Pioneer Group conferences require lots of planning and hard work, and because attendance is usually about 200-250 people, these are more difficult to pull off than say a smaller local Chapter meeting..

Permission

Depending on the size of the conference, you may be required to have the Vice President's permission before hosting a conference. Even if not required, it's important to talk with the VP before committing to host a conference.

In some cases, you may want to seek permission from your immediate supervisor and at the same time seek support (for example, allowing you to dedicate some of your time to organizing and hosting the conference, and agreeing to offer a welcoming speech).

Finally, you should contact the Pioneer Association committee that does conference planning. You may not need their services, but you should know what they can offer. Often they can give you advice and insights that are invaluable.

Set a Date

The general time of the conference should be suggested by the Pioneer Group.

Then look at the Chapter's schedules to determine what dates would be best. Submit a couple of possibilities to the Chapters for approval.

Consider the size and scope of your conference. Small groups can be hosted nearly any time. But larger groups will require housing, transportation, and food services that might conflict with other Chapter events..

Organize

This goes without saying, so we'll say it: Organize a conference committee as early as possible. Include as many people as needed to cover all the responsibilities outlined here. Include Chapter representation as well as members from the Association.

Communicate regularly with the leadership of your Group/Chapter/Council or Club as well as with previous hosts. There's lots of history that you can use to your advantage such as for-

mat, what works and what doesn't, etc. Also, remember that you're the host, but it's not your conference; you should be working with the leadership team to meet their objectives.

Establish regular planning/reporting meetings and/or Conference calls. Set up email lists. Always make it clear who is supposed to do what and when. Keep minutes/notes of your meetings and use them to follow up. The more you communicate with each other, the less likely you'll have slip ups.

Reserve Rooms

One of your very first items of business should be to reserve necessary rooms for THE business meeting, breakout sessions, exhibits, breaks, receptions, and registration.

Adapt your conference to the facilities you have available. Try to keep conference costs down by using rooms that are free. Again, this may require some adapting or negotiating.

Program

You may want to choose a theme (with the group's approval) that reflects the Pioneer's particular strengths or interests.(ie, Training and Recognition Conference)

Group meetings also require a program committee. There's just too much work, and too many decisions for one person to handle. If you have willing helpers, this might be a good place to use them.

A good program is critical. Look for variety, interest, timeliness. What do your conferees need or want to leave with? Try to balance lectures with discussions, hands on, social activities, and time for Pioneer interaction.

A general call for presenters should have a deadline that gives you ample time to recruit and to fill in gaps should you not get everyone on your list. Network with other Pioneers to identify people who might be invited to make presentations.

Start Organizing the conference schedule.

Create a tentative schedule, matching presenters to the facilities. You may want to lay out your schedule on a whiteboard, or use 3x5 cards on a corkboard so you can visualize how things fit together. Make sure you plan time for attendees to talk with each other, such as at breaks, before and after dinners, at receptions, etc.

Have all presenters submit a request for any special equipment (AV, computer, phone line, etc.)

Promotions

Promoting the conference begins as soon as the date and conference site is selected, by posting the date and location on the local Chapter or Group level web site. This will provide a common point for up-to-date information, on-line registration, and workshop descriptions, etc.

Provide the Chapters with as much detail as you have, including a tentative program. This is important if you want to convince people they should come. Set a registration deadline that accounts for your own deadlines (food services, etc.) You may have to consider a higher fee for those who are late, especially if that really does incur additional costs for you.

Housing

Estimate the number of people you think might attend (ask previous conference hosts) and make arrangements accordingly.

When making reservations with local hotels, negotiate other amenities if possible such as shuttle services (from airports, to conference sessions).

Be careful to avoid making reservations that require guarantees or other financial obligations. Find out how long reservations can be held, cancellation deadlines, etc.

Provide a secure website or other secure means for having the attendees provide billing information to secure the room.

Have one/two responsible individuals on your committee to work with the hotel.

Travel

Provide driving directions or hotel website for directions. Provide airline and local airport information.

Post this on your Conference website.

Food

Well-planned meals and snacks are critical to a successful conference. However, don't try to do this all on your own. Unless the conference is very small, or the food event is very simple, you should provide a committee to take care of meals and snacks.

They should determine what is needed, and what it will cost. Budget plays a big part in the decisions regarding meals. Let the hotel food services or the caterer do the work. (Be aware that some hotels or conference centers have policies that allow only hotel or conference center food services to cater meals that occur at that location).

Be sure to negotiate food services in such a way that you are not liable for food costs beyond what you can cover through conference fees. Usually food planners will allow up to 10% more people than you contract for (e.g., for late registrations), but be sure this is clear up front.

To reduce costs, seek sponsors for specific meals where possible. Some larger vendors are happy to get the publicity that comes from sponsoring a breakfast, lunch, reception, or even a dinner. In any case, it doesn't hurt to ask. If the sponsor desires it, and you allow it, let the sponsor choose the caterer and take care of the arrangements.

For small conferences, many if not most of the meals can be left up to the attendees. Be sure to provide a good list of local eateries. Include information about which are within walking distance, which are not, and how to get to those that are not.

Strategically scheduled snack breaks, with drinks and fruit or cookies, can add a touch of class to your conference. These don't usually cost too much. Don't skimp on the time allotted for breaks, since attendees will want to network and will take the time anyway.

If you do have group meals, be sure to allow for special dietary considerations (vegetarian, seafood, etc). Also, work with your association to determine when (or if) alcohol can be served, for example, at a cash bar reception.

Management Tools

Unless you have only a handful of people attending your conference, you'll need some sort of management system. In most cases, a simple database will suffice for mailings, conference lists, generation of name tags, etc. For larger conferences, consider a more capable database that also can handle many fields (e.g., presenter status, dietary requirements, etc.) For income and expenses, you may need a spreadsheet program. And unless you have a graphics department to prepare your program and brochures, plan on learning more about your favorite word processing program.

Money

When the conference is over, you don't want to be left with a handful of bills for which you (or your group) are responsible. Careful planning (projecting costs) and money management can ensure that you'll be financially solvent.

Before sending out the conference brochure/announcement, you must determine a conference cost. On the one hand, you want to cover your costs. But on the other, you want to keep the costs low so that as many people as possible can afford to come. Try to find a balance between providing the amenities, and keeping costs down

Be sure to include the following costs: Publicity (brochure, printing, mailing), facilities (fees, equipment rentals), Association staff/guests, transportation, meals (snacks, meals), conference materials (packets, name tags, etc.) Remember that you can always do things more cheaply if you don't count all the costs... so count them!

Find out from your leadership what will be contributed toward the cost of the conference. Determine if there is to be a difference in cost for members and nonmember. For conferences where there is a registration fee, you might consider including the cost of membership in the registration fee for a nonmember. This not only helps them pay their fair share, but also increases your group's membership.

Attendees should be expected to secure hotel registrations in advance. This helps provide an accurate picture of the number who will attend because the attendees are more committed to attending. You can consider a slightly higher fee for late registrations or registrations onsite, if your food and facilities planning can handle extra last-minute registrations. Refunds should be allowed, but not after deadlines for food and facilities counts have passed.

The committee should determine the best (i.e., most prudent) method for handling registration fees and for paying conference bills. Often a special account can be set up just for your conference. Be clear up front what accounting procedures are to be used (for example, what kind of documentation will be required to get reimbursements from this account.)

Don't minimize the importance of a detailed accounting of your conference funds. Setting things up right before you begin to receive hotel security can make things a lot easier.

Vendor Displays

Exhibits take a lot of work to coordinate and set up. The larger the conference, the easier it will be to convince vendors to participate. Smaller conferences may not even want to have exhibits. If you do have an exhibit, assign a committee member to be in charge.

An exhibit area must be easily accessible and must have adequate space to accommodate vendor booths. There may be costs associated with such an area. Some facilities require that their own people set things up. Make sure you know what is included with any rental costs, and what you may have to pay extra for.

Make sure that there is adequate time for attendees to visit the exhibits and to talk with vendors. Also, consider including vendor-sponsored sessions at the conference, or having the vendors participate in panels. Depending on the benefits to the vendors, you may ask that they pay for exhibit space, or leverage their participation by asking them to sponsor one or more conference activities (reception, meal, etc.), or to provide conference bags.

Conference Materials

At a minimum, you need to provide some sort of printed program. For most conferences, the following is usually adequate: a simple folder with program, maps, lists of local restaurants and attractions, a name tag, and writing materials (pen and pad). For larger, better financed conferences, you may want to include a conference bag. Sometimes you can also ask vendors to provide "freebies" that you can include in the conference packet.

Name Tags

If you plan properly, you should be able to generate name tags to be printed from your conference database program.

Keep the name tag layout simple: a small conference logo or title, the person's full name in LARGE, readable letters, and the person's institution. Don't make people squint to read names on name tags.

The actual type of name tag (paper stick-on, pin on plastic case, hang-around-the-neck, etc.) depends on your preferences and budget. If you do provide stick-on tags, you may want to generate at least one tag for each day of the conference since they won't be able to reuse the tags. If you use plastic badges, you can invite attendees to recycle them at the end of the conference.

Equipment and Support

This is another critically important part of the conference, especially in our technology-driven organization. You should assign a member of your committee to head this up since it's a demanding and time-consuming responsibility.

To the extent that you can, schedule conference sessions in rooms that have basic AV equipment (overhead projectors and screens, for example). If the rooms already have computers

and computer/video projection, that's even better. Then assign conference sessions to the appropriate rooms.

Determine ahead of time what portable equipment you have available, and whether you have to rent equipment. Then when you confirm conference presentations, ask presenters to provide you with a list of equipment they need. Encourage them to bring their own laptop computers whenever possible. Also, let them know when equipment must be rented, and ask them to consider whether such equipment really is needed, or if they can bring their own.

Once rooms and equipment are assigned, the person in charge should make sure the equipment is in place and working, and to move it as needed. For larger conferences, support staff assigned to a specific presenter/room can be helpful.

You might also consider having a central equipment distribution room, not only for security of equipment, but also so conference presenters know where they can go for help, or to pick up that extra extension cord.

Computers

These should be considered as part of the equipment considerations listed above. However, they also present special problems.

Presenters should supply information as to the platform (Mac, PC), operating system, hardware requirements (disk space, RAM, CPU speed), application software, network connections required, etc. If you can set up computers ahead of time, based on presenter needs, that's great. But more often, you will want to make equipment available to presenters ahead of time so they can set up software and make sure they operate as expected. Again, if presenters can bring their own laptop computer they can avoid a lot of uncertainty.

If software is installed, make sure it's clear who cleans up (removes) such software after the session.

Entertainment

Depending on the size and scope of the conference, you may need to provide for one or more social activities for attendees.

At smaller conferences, organized dinners at local restaurants can be enjoyable. For larger conferences, a banquet may be in order. At the very least, provide a list of recommended local eateries for those who want to venture out on their own. However if attendees will not be attending a particular meal, they should notify the meals coordinator prior to the head count deadline. Otherwise an unnecessary expense will be incurred for those meals.

You should also consider whether your locale has something uniquely interesting to offer. If feasible, you could organize a group outing to a play, local site, etc. Be sure to determine whether costs are included in the conference, or if it is to be a separate (and therefore optional) cost.

If yours is a very large conference, you may want to offer optional activities for families, especially if your locale, weather, and schedule promise to attract families and friends of conference attendees.

Whatever you plan, however, be sure to include some free time for people to do things on their own.

Summary

One of the joys of our Association is the opportunity to get together in group meetings. As a conference organizer you are providing a needed and appreciated service. Yes, hosting a conference involves a lot of work. But if you plan ahead, considering the above suggestions, you should be able to enjoy the conference just as much as those who attend.

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