

# Workshop/Conference Planning Guide & Timeline

## 6-12 Months from Workshop/Conference

### Decide on a Workshop

- Choose an objective or set of goals
- Define the overall format for the workshop

### Delegate

- Define the specific duties of the coordinators
- Contact and seek advice of experienced workshop coordinators (ask if there is a workshop notebook from previous years)
- Decide what administrative assistance is needed
- Delegate duties to individuals you can trust! Choose one person each to oversee: exhibit hall/hotel, coordinating the program (final selection of program submissions should be done by at least two people), publications, entertainment, pre-conference workshop(s), and transportation. Registration and finances should go to the person “most responsible” for the conference.
- Contact your local Chamber of Commerce/Convention Bureau to see what help (personnel and materials) they may be able to offer.

### Prepare a Workshop Notebook

- Include all preparation details for immediate and future use, as well as:
  - Initial checklist
  - Mailing list (requested from the NNC)
  - Sample publicity letters
  - Copies of workshop correspondence
  - Program agenda and presentations
  - Expense/financial report
  - Final evaluation
  - Follow-up communications
  - Future recommendations

### Begin contacting potential exhibitors

### Determine Site, Date & Time

- Avoid scheduling the event in competition with NIRSA Board of Directors’ meetings, NIRSA Annual Conference, symposia, or other regional or state/provincial events in your

area. [See the NIRSA Calendar](#). When scheduling, also take into consideration holiday seasons, inclement seasonal weather, and school terms.

- Communicate the dates of your event to the NNC and your Regional VP/Regional Representative for inclusion on the NIRSA Calendar.
- Determine starting and ending times – consider the transportation requirements of the majority of the participants.
- Choose a site that is centrally located and easily accessible. [See the Site Planning Worksheet](#).
- Assure that transportation is available to accommodate program participants.
- Consider facility rental fees.
- Sign contracts for hotel, dining and exhibit hall. Try to negotiate comped rooms for the host committee and any possible VIP's (NIRSA Executive Director, NIRSA President). (If you cannot get comped rooms, ensure that you get the best rooms available at the conference rate.) Stay in the hotel at the conference and try to move in the night before. Find out if hotel has storage room off of the conference area to securely store your conference materials for the duration of the event. Be sure to have a window where guaranteed conference rates are made available to attendees up to at least 30 days before the conference.

## Financial Considerations

- Determine expenses **before** setting registration fees.
- Keep accurate records.
- Consider the following expenditures:
  - Rental fees, set-up fees, food service, tips, tax, audiovisual needs, etc.
  - Mailings and extra postage, if applicable.
  - Miscellaneous expenditures: posters, paper, pens, markers, envelopes, coffee, social events, informational packets, badges/inserts, etc.
  - Keynote speaker fees & material costs (printing/copying).
  - Publicity costs
  - Phone charges
- Research the possibility of sponsorship and exhibitor dollars. **Secure funds before advertising registration fees.**
- Encourage donations and volunteer help.
- Workshops/Conferences are expected to be self-supporting. **NIRSA-endorsed events must submit a balanced budget before registration materials are published.**
- Submit your proposed budget to the NIRSA National Center for their records.

## **Contingency Fund**

Regional contingency funds are a self-insurance fund for individual regions. Requests to access the regional contingency fund must be made through the Regional Vice President/ Regional Representative, and the workshop must have the appropriate documentation to be considered NIRSA sponsored or endorsed.

All income earned in excess of authorized expenses will be returned to the National Center with 100% of the remittance devoted to a self-insurance fund for the respective region. Hosts of NIRSA endorsed state/provincial events conducted within states/provinces with state/provincial associations, remit 25% of any excess income (profit) to their regional fund, with the remaining 75% being deposited into their state/provincial association fund. When a regional contingency fund reaches a total of \$4,000, monies in excess of \$4,000 (minimum base fund) may be allocated for purposes that include the professional, educational, and social programs or student scholarships at NIRSA national, regional, or state/provincial conferences or workshops. Criteria for student scholarship programs must be approved by the Board of Directors before implementation. Any use of regional funds outside the region must be approved by a majority vote of the regional membership at their regional conference meeting, or at their regional meeting at the Annual Conference. The regional funds may also be available for financial assistance if a subsequent NIRSA endorsed state/provincial or regional workshop results in authorized expenditures exceeding actual revenues.

### **How to Access Money from a Regional Contingency Fund**

NIRSA endorsed events are eligible to draw from regional contingency funds. In order to utilize money from a regional contingency fund to cover expenses during the planning of a NIRSA endorsed event (e.g., hotel deposit) a request must be submitted in writing to the appropriate Regional Vice President/Regional Representative explaining what the money will be used for. The vice president will then forward a written request to the education program coordinator at the NNC for processing. Allow 10 business days for processing.

Following an event, requests to access regional contingency funds to cover financial losses must be made in writing to the appropriate Regional Vice President/Regional Representative, who will forward the request to the education program coordinator at the NNC. The Regional Vice President/Regional Representative will consider disbursement requests based on the event's proposed budget, and available money in the contingency fund. If the contingency fund is at the base level, or if event expenses exceeded those given in the proposed budget due to the addition of line items not included in the proposed budget, the hosting institution may be required to cover the deficit.

### **Promotional and Registration Mailings**

- Request a list of Members in your state/region from the NNC using the [Materials Order Form](#).
- The first mailing announces the event date, time, site, and possible topics of discussion. Remember to include workshop coordinator contact information!
- Encourage recipients to post the workshop announcement and to pass the information on to others who may be interested.

- Mail registration material no later than five weeks prior to the event when using postal service. Information must include the registration form and fees, program agenda, directions to the event, and (if applicable) information about overnight accommodations.

## **3-6 Months from Conference**

### **Develop Program Agenda**

- Set program schedule after all presentations have been submitted and approved. ([Click here](#) for a presentation proposal form sample.)
- Inquire about the need for audiovisual equipment early in your planning, and make arrangements for equipment/assistance.
- Prepare a flexible program agenda.

### **Keynote Speaker**

- Solicit suggestions for speakers (check evaluations from previous years to know who would be best suited for your current year).
- Contact potential speakers for presentations (consider local experts as well as visitors).
- Determine if there is a speaker's fee and who is responsible for handouts etc.
- Personally contact keynote speaker to discuss AV requirements, room set-up, etc.
- Suggest a general topic to set the tone for the workshop/conference and inform speaker of speaking time.
- Request vitae sheet for use in preparing introduction and pre-workshop publicity.
- Determine transportation arrangements (if necessary).
- Assign an individual to serve as speaker's on-site contact.

### **Miscellany**

- Create registration form, hotel info sheet, transportation info sheet, request to present registration form, basic times for the conference. Set registration deadline (at least one month before the conference) and late fees.
- Contact regional NIRSA Members to gather potential vendor contacts.
- Finalize pre-conference activities.

- Invite VIPs. (It is optional to provide them with free registration or accommodations.) VIPs include:
  - NIRSA President
  - NIRSA Executive Director
  - Regional Vice President/Regional Representative
  - State/Provincial Directors, as applicable

## **Sustainability**

### **1-3 Months before Conference**

#### **Publicity**

- After submitting a proposed budget to your Regional VP/Regional Representative and the NNC, if you have an event webpage, email a request to the NNC to link the webpage through the NIRSA website.
- Contact state/provincial and national professional organizations to publicize the workshop in newsletters, journals and magazines.
- Ask attendees to bring promotional material about upcoming events in their area for display on a resource table at your event.

#### **Mailings**

- Print out hard copies of materials to send to prospective attendees.
- Order envelopes for hard mailing.
- Mail out materials to everyone on the mailing list.
- Contact your mayor's office and see if they will write a welcome letter (to include in welcome packet or read at the conference in introduction).

#### **Sponsorships**

- Secure sponsors for keynote speaker, opening social, lunch, dinner and entertainment.
- Secure sponsors for goodies: bags, pens, t-shirts, binders, etc. if applicable.

### **1 Month before Conference**

#### **Program Folders/Packets**

- Include program agenda
- List of attendees
- Name badges and blank inserts (available for purchase from the NNC)
- Blank paper for notes

## **Hotel**

- Finalize food and hotel arrangements
- Meet with the hotel and go over details (Presentation rooms, storage of vendor handouts, etc.)

## **Correspondence**

- Create thank you letter template for exhibitors and other contributors.
- Re-send materials online at least one week before the registration deadline (noting the price goes up the following week)

## **Transportation**

- Finalize any transportation needs (vans, shuttles, etc.)
- Determine final transportation plan

## **Programming & Procedures**

- Finalize the program if possible
- Determine if registration is high enough to justify holding the pre-conference activities
- Confirm keynote and send NIRSA biographical information to familiarize the speaker with NIRSA (get information from the NIRSA webpage)
- Determine the actual cash handling and cash drop procedure for the on-site conference same-day registration.

## **Materials**

- Order conference badges, badge inserts, NIRSA banners, and ribbons (host, conference presenter, etc) from the NNC
- Create receipt template for conference attendees. Receipts should be given out on site (in the envelope you hand out with the name badge).
- Have all items to be stuffed in goodie bags (pens, folders, t-shirts, etc) ordered by now. All items should be delivered at least 10 days in advance of the conference.
- Create conference evaluation

## **2 Weeks before Conference**

- Print programs for the conference. (Check out your on-campus copy center for prices).
- Create labels for envelopes to hold conference materials.
- Secure signs from any potential sponsors and work with the hotel on having these hung.
- Secure thank you gift for your conference keynote and any other appropriate individuals.
- Find/make box for host/registration table for conference evaluations.
- Find volunteers to monitor program sessions and hand out/collect evaluations by this time.
- Assign/secure a photographer to take digital pictures

## **1 Week before Conference**

- Place labels on envelopes and stuff with conference receipts, food tickets (if that is a part of the conference), badge inserts and ribbons.
- Stuff bags with conference program, conference pens, folders, t-shirt, binders, other giveaways, meal ticket, local area restaurants/things to do in the area, map of campus/area, and host materials.

## **1 Day before Conference**

- Move into hotel room and store all registration materials and goodie bags in the hotel. If hotel doesn't have storage, move items into room with you.

## **On-Site at Conference**

- Plan to have one registration table, one host table and one table for give-aways of bags/goodies. Can combine tables into areas but will need at least three people for anticipated busy registration time.
- Plan to have at least one person at the registration table/area at all times of registration.
- Host committee should only plan to attend the business meeting.
- Bring extra receipts and a small amount of cash to make change (dollar bills and fives are good).

### **The Coordinator's Role**

- Organize registration area (informational material should include: name badges, guest list, receipts for registration, directions to nearby restaurants, etc.).
- Post directions to meeting rooms and provide directions to offsite locations, if applicable.
- Greet visitors upon arrival.
- Deliver the welcoming address (or make arrangements for someone else to speak).
- Introduce speakers and VIPs in attendance.
- Initiate breaks between sessions.
- Stimulate discussions as necessary.
- Supervise facility and meeting room preparation throughout day.
- Ensure audiovisual equipment is available and ready for use (consider availability of back-up equipment and/or assistance).
- Set up a resource table to accommodate materials brought by attendees.
- Display NIRSA literature in registration area.
- Involve workshop staff in a post workshop evaluation session.
  - Summarize evaluations
  - Discuss plans for the next workshop

## **Workshop Frills**

- Refreshment breaks (if budget can accommodate)
- Coatroom and staff to supervise, if needed
- Directions to local attractions and restaurants
- Welcome signs

## **Post-conference**

- Finish the budget as soon as possible, write a short report on the conference and send to the Regional VP/Regional Representative. Must be done within 30 days. This report should include:
  - A complete financial report (budget)
  - Actual attendance by membership category
  - Description of successes & shortfalls (to assist future hosts)
- If conference has more revenue than expenses, send the appropriate funds to the proper reserve account at the NIRSA national office. When applicable, state/provincial associations receive 75% of the income; and the remaining 25% is sent to the NNC for deposit into the appropriate regional contingency fund.
- Print out a clean copy of all materials, insert into binder, burn a CD, and forward to the next host (within 30 days).
- Send out thank you letters to vendors, keynote speaker, and anyone else who helped you.