

The National Association of Resource Conservation and Development Councils (“NARC&DC”) is pleased to provide the Western Association of RC&D Councils with this Meeting Planning Guide. This guide is designed to be a useful reference, which will assist you in your efforts of planning a successful regional conference. We know that planning a large conference is a daunting task and can seem overwhelming at times. However, this step-by-step guide with pull out appendix will give you the basic tools needed to help organize your next regional meeting.

The items in this guide can also be adapted for planning State Association Meetings and other conferences.

The first part of the guide will give you, the planner, a micro view on what you must do to accomplish your goal of having a successful meeting. The second part of the guide will provide you with “take along” lists and checklists to enable you to accomplish your goal with relative ease. These ‘take along” documents can also be found on the CD accompanying this guide for ease of use.

We hope that you find this book easy to use, as well as, a valuable asset to your meeting-planning arsenal.

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So you want to plan a meeting?

The Request for Proposal

Every good meeting starts out with the Request For Proposal (“RFP”). This instrument is designed to give potential vendors the information they need to help successfully bid on a plan your meeting. Thus, the more information you can include in the RFP the more accurate your budgeting will be.

What should you include in a basic RFP: *(See Appendix X for a Sample RFP)*

- 1) Your organizations name
- 2) The name of your meeting
- 3) A contacts name, address, telephone number, fax number, and e-mail address
- 4) The Location of the meeting
- 5) Dates of the Meeting
- 6) Number of Attendees and profile of attendees
- 7) Previous locations of meetings
- 8) Let the vendor know if you would like certain items priced together or separate
- 9) Specify a unit of measurement for calculations
- 10) Include what complementary or discounted items you wish to receive as a result of the proposal
- 11) Ask that the vendor provides a list of references
- 12) Deadline for proposals

What specific information might you wish to include for a more detailed RFP:

For the Hotel

- 1) How many rooms are needed and on which days;
- 2) How many meeting rooms are needed, if any;
- 3) A statement as to if the Hotel is ADA compliant and if they will warrant their compliance.

For Tours/Entertainment

- 1) Date and time of tours. Are dates flexible for a better rate?
- 2) Profile of attendees for tours;
- 3) Minimum and Maximum number at attendees required to conduct a tour;
- 4) What meals are to be provided on the tour;
- 5) What type of transportation will be provided (include type and age of each mode of transportation);
- 6) Are restrooms required on transportation; and

- 7) Whether you want all taxes and gratuities to be included in the proposal.

Audio/Visual

- 1) Number, location and times of all sessions, including Luncheons and the General Session;
- 2) Specific equipment needs, such as Laptop Projectors, Screens, Microphones, etc. Make sure you note if your needs are estimated or actual;
- 3) Whether to include the cost of setup or takedown in the proposal;
- 4) Whether technicians are required;
- 5) Should the vendor's services be made available to the others at the conference, such as, exhibitors; and
- 6) Need for walkie-talkies.

If you need a General Services Contractor for Exhibits:

- 1) The number of booths needed;
- 2) The size of booths;
- 3) The availability of booth packages (include table, chair, rug, etc.);
- 4) Number of Registration Counters;
- 5) Signage required in exhibit area, session rooms, banners, etc.;
- 6) Need for storage, moving of freight, shipping at end of conference, etc.; and
- 7) Labor requirements.

Specific Items for Food and Beverage:

- 1) Menu Prices
- 2) Guarantees; usually needed 48 to 72 business hours prior to function
- 3) State if you want taxes and gratuities included
- 4) State the facilities Alcohol Service Policy

Finally rate and rank each proposal looking at the factors you established then pick the best choice. A SAMPLE RFP CAN BE FOUND IN APPEXDIX X.

The Facility

Scheduling the Meeting:

If your meeting dates are flexible you may be able to find better hotel rates, also be sure to review a calendar to ensure that your meeting does not conflict with any civic or religious holidays, or fellow association or organization meetings.

Where to schedule the Meeting:

Site Selection...Often the beginning but more than a destination.

Since RC&D is a voluntary organization picking a desirable meeting space may assist you in increasing attendance. When deciding on a location look to see where the participants are located and determine if there is a ideal central location, sometimes this will be near a major airport or train station. In addition, since your regional meeting is annual you may wish to incorporate a rotation schedule among the various states within your region. Upon picking a destination city you may want to rate the following factors in determining which location is best for your meeting. (*See Appendix III for a sample Site Selection Guide.*)

Meeting Tip: When picking a location a great place to contact is the Visitors and Convention Center or local Chamber of Commerce for assistance in finding hotels, convention sites, or local attractions. You may even wish to utilize them for sponsorship or to provide free information for your attendees.

- 1) Climate
- 2) Recreational Facilities
- 3) Nightlife
- 4) Tourist Attractions
- 5) Perceived Image
- 6) Would you want to visit this location
- 7) How easy is this location to access (is there adequate transportation to get to and from the meeting)
- 8) Availability
- 9) Who else is scheduled on your dates?
- 10) Area
- 11) Overall Impression
- 12) ADA
- 13) Parking
- 14) Guest Rooms
- 15) Security
- 16) Meeting Space Requirements
- 17) Budget Considerations

- 18) Service Manager
- 19) Public Space
- 20) Staff and Staffing
- 21) Accessibility
- 22) Banquet Food (Eat there if possible)
- 23) Number and Type of restaurants
- 24) Public telephones
- 25) Likes
- 26) Concerns

Then Rate, Rank, and make a site selection!

Meeting Tip: Use the *site inspection checklist* like the one in **Appendix III**. Remember memories fade when you inspect multiple sites and the checklist will give you your first impressions.

When choosing the meeting destination it is always a good idea to plan a site visit prior to the meeting date, preferably during the same time of year as the planned meeting date.

Meeting Tip: You can probably negotiate to have the airfare credited to you account if you provided the airline a pre-agreed number of passengers traveling to the meeting.

How to pick a Hotel:

The next important step is to pick a hotel for the meeting attendees to stay. Things you should consider when choosing a hotel are:

- 1) Is it accessible to a major transportation hub?
- 2) What is the airport transportation cost and travel time to the hotel and meeting area?
- 3) Are there attractions near the hotel?
- 4) Are there food accommodations near the hotel?
- 5) Is the meeting space easily accessible from the hotel?
- 6) Does the Hotel have adequate sleeping, meeting and function space for your group?
- 7) Is the Hotel in compliance with the Americans with Disabilities Act (“ADA”)? Make sure that the Hotel understands the basic etiquette for those with Disabilities.

Meeting Tip: Better meetings happen if the hotel and meeting space are within walking distance

Meeting Tip: Make sure that the hotel does not have any scheduled remodeling or construction planned immediately before or during your meeting.

Hotel Rooms:

When negotiating with the hotel you will want to inquire as to:

Meeting Tip: Hotels want your business and they are willing to work with you! Thus, do not be afraid to ask for items you want at your meeting!

- 1) The total number and types of rooms in the hotel and the maximum number that can be committed to the meeting.
- 2) Establish the rate structure for both single and double occupancy, as well as, children staying in the room
- 3) Establish a cutoff date for room reservations and the cutoff date for the room block
- 4) Establish how many days prior and after the official meeting dates special lodging rates apply
- 5) Establish check-in/check-out times for your guests, establish late check-in/check-out times and for staff
- 6) Review services such as complimentary breakfasts, newspapers, refrigerators in rooms, local phone calls, etc., If possible, negotiate to have them included at no extra cost.
- 7) Determine what shall happen should the hotel not be able to deliver confirmed rooms (See if they can provide overflow housing at another location for the same negotiated price and provide free transportation to the facility.)
- 8) Negotiate complementary room availability. (Determine how many complementary rooms will be made available per paid room blocs, or if complementary rooms are not provided see about discounts or room upgrades.)
- 9) Find out about the hotel's storage ability for luggage after checkout

Meeting Tip: Make sure that you get as much of the above items in writing to legally confirm what each party has agreed to!

The Facility:

Now that you have selected your meeting space it is important to meet with the staff and get to know whom you will be working with. When getting to know staffs make sure that you obtain their shipping and mailing address. In addition, it is always a good idea to know how much each facility can store and how far in advance the facility can store material for you meeting. Finally, find out if there are any costs, levied by the facility or hotel, associated with receiving a package or shipment.

Meeting Tip: If the facility has a limited amount of storage space see if they can reserve a room for your organization to store additional items.

Meeting Tip: If you are having your meeting at a convention center, find out if materials need to be shipped to a catering or drayage company or if they should be shipped directly to the convention center or hotel.

When preparing for the meeting, you want to make sure that the facility and individual rooms are adequate for the attendance expected, there is nothing worse than going to a meeting with inadequate seating. You should also make sure that the rooms have adequate sound insulation. This is especially important if your meeting space is near an HVAC unit or near a kitchen, freight elevator, or other function space. If the space is near one of these types of distractions, you may wish to request another room, or seek assurances from the facility that the distractions are kept to a minimum.

Meeting Tip: At the end of the meeting, make sure you obtain a copy of the per-night room pickup and the food and beverage revenue statistics for comparison to the final bill. This will help ensure that your organization received the proper credits.

The Setup!

The setup of the meeting room can make the difference between a productive or a non-productive meeting. The setup you choose depends on how many people are attending and what the meeting is to accomplish.

There are many basic seating arrangements. Whichever you choose, your primary objective should be to devise the most comfortable arrangement possible, and one that will promote open discussion among attendees, as well as, with the discussion leader.

To select the best setup for your meeting, first consider the following points:

- 1) Participants need a sense of identity with the group with which they are sharing the same learning experience. Physically and psychologically, they

should feel “closeness” with other attendees as well as with the meeting leadership. If you position attendees too far apart from one another, they will feel lost. On the other hand, if they're too close to one another, they will feel crowded.

- 2) It should be easy for every person to see all the other individuals and to hear everyone's contributions.
- 3) Participants should be able to view the visual material presented without strain.
- 4) It should be easy for attendees to leave the room without disturbing or crowding others.
- 5) When seated, neither individuals nor their chairs should touch people or furniture beside, in front of, or in back of them.
- 6) If there is extensive writing to be done or if participants will remain in one place for more than two hours, seat them at tables, preferably without a cloth.

When setting up the function space most facilities can set up a meeting space in many ways. Examples are:¹

- **Theatre:**

Theatre setup (Chairs in rows, facing front, no tables) is the arrangement of choice if you're featuring a number of speakers, a performance, or elaborate audiovisuals, and if you want to maximize the space in a room.

This setup, however, is crowded and there is less likelihood of getting good participation from attendees. In a typical group, one-third will actively participate, another one-third will moderately participate, and the other one-third won't participate at all. In addition, there is no place to put notebooks, handouts and other belongings. Those sitting in the back of the room may have difficulty hearing questions being asked by those in front and writing can be difficult.

Do not crowd attendees. Place three to six inches between chairs, and two to two-and-a-half feet between rows, measuring from the back of the chair to the front of the seat behind it. The room between chairs is very important to attendees both physically and psychologically.

If you plan to project audiovisuals, make sure your ceiling is high enough. The common eight-foot ceiling is too low. Be certain to select a room with at least a nine- or ten-foot ceiling.

¹ This list has been adapted from the Motivational Marketing Associates 1996.

Classroom:

Attendees are seated in rows of tables placed facing the front. This is an excellent setup if there will be a number of speakers or extensive note taking.

Classroom setups allow the introduction of team projects during the course of the meeting by having participants at every other group of tables turn to face those behind them to form small discussion groups.

This setup takes up a lot of room because of the many tables and the spacing between attendees. Provide two-and-a-half feet between participants and two-and-a-half to three feet between rows.

When selecting a room for this setup or any other, it will be difficult to get attendees to participate. Unless microphones are provided, it may be difficult for attendees in the back of the room to hear or see people talking in the front since those in front.

A square room is best. If the room is not square, a good rule of thumb is that the length of a room should never exceed its width by more than 50 percent, i.e., a room 20 feet wide should be no more than 30 feet long.

Conference Style/Hollow Square/Rectangle:

In the conference style setup, participants sit on three sides of a rectangular table and focus on a power figure at the head. This arrangement makes it easy for participants to see one another and also provides a writing surface.

The hollow square setup has four or more tables arranged in a square or rectangle. Participants sit on all sides, everyone has the same amount of space and there is an emphasis on a power figure.

Setup is critical as far as participation is concerned. Conference style or Hollow Square is best for fewer than 30 people. If the group is larger than 30, this setup is stretched too far. If the participants can't hear or see well, there is no feeling of collegiality. Allot two to two-and-a-half feet between individuals.

U-Shape:

The U-shape is one of the most popular of seating arrangements

for groups of less than 30 participants. This seating style, optimal for training sessions and speaker presentations, positions the leader either in the middle of the connecting end of the U or in the middle of the U.

The openness of this setup gives attendees a sense of freedom that encourages wider participation, while the amount of space between attendees avoids the effect of compression. Also there is no sense of preferential seating because all seats have an equally good view of the meeting leaders.

Meeting Tip: When planning multiple day events, try various room setups. This gives variety to the audience.

Lets think about Equipment

Various types of equipment can help to increase the impact the speaker has upon the audience. Here are some things to think about:

- Consider using a wireless microphone, many individuals would rather see a moving person rather than a stationary talking head.
- Remember your speakers! Some may be tall, some may be short, consider using an adjustable lectern to ensure that any speaker can reach the microphone.
- If a speaker is using a PowerPoint or slides consider putting the backdrops or screens on an angle to ensure that the speaker does not have to turn their backs on the audience.
- If a speaker is scheduled after a meal, make sure the setup does not call for dim lighting.

(See Appendix V for sample Speaker Audio/Visual Requirement Form)

What else should on think about for the meeting Space?

Atmosphere:

Thermostat Controls

Lighting

For the Audience:

Most common...

Paper and pens

Outline of important information

For the Speakers:

Podium

Microphone---placed or mobile?

There are many types of microphones that can be used however; here is a list of the most common types.

- 1) Lectern/podium Microphones: This type of microphone sits on top of a lectern/podium and is usually stationary.
- 2) Lavalier Microphone: This type is usually worn by the speaker and allows the speaker to move around the room or stage.
- 3) Table Microphone: This type of microphone is best used for panels when the speaker will be seated at a table.

- 4) Standing/Aisle Microphone: This type of microphone is best used for audience questions or where the speaker will be stationary on the stage without a lectern/podium.

Overhead projector and screen

Laptop –projector and screen

Meeting Tip: When ordering a screen, make sure you take into account the ceiling height and any obstructions to the height such as chandeliers.

VCR

Display table

Flip Chart and working markers

Meeting Tip: Always have a technician at the meeting; you never know when a technical difficulty might arise.

Food and Beverage at the Function:

To give your attendees a break from the meeting room it is always a good idea to have banquets, lunches or the like in a separate room.

Be sure to review the facilities policy for accommodating guests' special meal requests for dietary or religious preferences.

Items to think about when planning for meals:

- 1) Before you begin negotiating make sure you have a per person budget in mind (Make sure taxes and gratuities are factored into your budget)
- 2) Ask in advance for a complete set of current menu suggestions, process and policies for review. (Also find out if the facility expects to implement any changes to the menu and, if so, when is the deadline for confirming prices based upon the current menu.)
- 3) Ask to see what is in season to help customize the menu and bring down the costs
- 4) Ask about guarantees, how many hours in advance must the facility be given for the minimum and maximum numbers of meals
- 5) Ask about the tolerance level for estimated versus actual attendees and the charge for no-shows
- 6) Ask about the amount of extra meals that will be available for purchase

Meeting Tip: Make sure you ask about hidden charges such as tax, gratuities, service charges, setup fee, decorations, carving person, labor, bartender, etc.

What to think about when planning for Breaks:

- 1) Make sure the hotel provides signage that specifies that the break is for your group.
- 2) Order coffee by the gallon or half-gallon and always order some decaffeinated coffee.
- 3) Make sure that soft drinks are ordered on a consumption basis and inventory the drinks, with a hotel staff person, at the beginning end of each break to ensure that your group is not charged for other groups dipping into your beverages.

Meeting Tip: If you are unsure of your potential consumption of food and beverage for breaks it is always a safe bet to order consumables at a rate of 75% on the first day then adjust the numbers thereafter.

Liquor at the Meeting:

Historically, at the Western Association Meeting, liquor is served on Sunday night at the Presidents Reception and on Tuesday night at the Dinner/Auction. Having liquor at any meeting can be costly, however, depending upon the consumption patterns of your guests there are ways to reduce your costs. Below are the three most common ways to purchase Liquor at most facilities.

- 1) **Cash Bar:** This is the most commonly used method at the Western Association's Regional Meeting and this is where the individual whom is consuming the alcohol pays for each drink consumed. Usually, the hotel charges your organization a bartender and bottle opening fee.

Other Options are as follows:

- 2) **Per Drink:** This type of plan allows for the facility to charge your organization per drink ordered, based upon a pre-set price or prices (Drink prices can vary depending upon the quantity of liquor used in the drink. Note you may limit this by letting the facility know that you only want drinks served that fall under the X price.) This is the most common method used to save costs.
- 3) **Per Bottle:** This type of plan allows the facility to charge your organization based upon the amount of bottles opened, based upon a pre-selected price per bottle. Remember, you will be charged full price for the bottle, even if only one shot is poured from the bottle. However, some facilities will allow you to combine partial bottle, giving you credit for full bottle, diminishing the cost to the organization. This type of plan usually makes sense when the meeting will be having multiple events in which liquor is served, allowing the facility to carry liquor over from one event to the other.
- 4) **Per Person/Unlimited Consumption:** This is the most widely used plan where the facility agrees to charge the organization a set fee, per person, for a set amount of time. The fee charged and the amounts of actual liquor consumed are not related. Although this is the most widely used plan it is often not the most economical as the facility usually bases its set fee on the assumption that people will consume a great deal of liquor.

Besides choosing which plan to use, a few hours before the event, you must make sure that you inventory the bar. To perform an inventory you should (Only to be used for the Per Bottle Plan):

- 1) Make sure the bar is completely set up
- 2) Count the type of liquor and number of bottles at the bar
- 3) Make sure all seals are intact for each bottle
- 4) Put the above information down on paper and have both yourself and the head bartender initial the count

- 5) If possible: Ask the bartender to not discard any empty bottles, not to give out any liquor by the bottle, not to bring in any additional bottles without the consent of your organization

After the event is over you should perform a final inventory. To do this you should:

- 1) Perform a recount of the type of liquor and number of bottles at the bar
- 2) Make note of how many bottles were used and how many will be returned to the facility
- 3) Compare the numbers with your initial inventory
- 4) Have the bartender and yourself initial the count

The Legal Stuff

The legal stuff can be scary, but if you take your time, you can walk through this maze. Because anyone can initiate litigation, even if you feel you have not done anything wrong, insurance and knowing the terms of any contract you have signed can save your organization from an insurance and sometimes financial nightmare. When reviewing any type of contract it is always a good idea to read it twice. The first read through identify any terms or clauses that need to be rewritten, deleted, or changed. Once you have done this, reread the contract and identify what needs to be in the contract, which is not already there. Then begin your negotiating.

Negotiating with the facility:

Everything in a contract is negotiable, all you have to do is ask, and have a meeting of the minds. Some clauses you may wish to put into your contract are:

- 1) Meeting room will be ready on time or the account will be credited \$XX.
- 2) Refreshment break(s) will be served promptly or the refreshment break will be complimentary.
- 3) Meal functions will be served as scheduled or the account will be credited 5% of the meal cost.
- 4) Meeting rooms will be refreshed during refreshment and luncheon breaks (does not include exhibit halls) or the account will be credited \$XX.
- 5) Meeting and banquet rooms will be set up according to the written specifications or the account will be credited \$XX.
- 6) The convention service manager or management representative will respond to any problems that may occur within 15 minutes of notification or a complimentary room night will be provided.
- 7) The hotel will honor all guaranteed payment reservations or it will place the guest in a room at the closest, comparable, available hotel and pay for transportation to those accommodations and back to the hotel the next morning, pay the first night's lodging at the alternative hotel, and pay for the first X minutes of all telephone charges.

After negotiations it is a good idea to send a confirmation letter, this gives both parties the opportunity to clarify any misunderstandings. Confirmation letters should include:

- 1) Names of all parties involved in the transaction
- 2) Dates and places of the events
- 3) Description of the space that will be used, as well as, any services and equipment that will be supplied.
- 4) Any special considerations or agreements that have been negotiated.
- 5) Description of any payments made to date and how payments were made.
- 6) Any request for a signature or approval if needed by either party.

The Contract:

First and foremost it is always good to have a **contract in writing**. Although a writing is not always necessary it is usually a good idea². Before signing a contract, be sure to read the contract from cover to cover. Make sure that all conditions negotiated are in the contract. (Remember, a contract is a legal document, a meeting of the minds, it is the terms of the deal - boiled down to writing. If terms are left out of the contract then it can be assumed that they are immaterial to the contract and may not be enforceable.) In addition, should you change any terms in a signed contract make sure that those changes are reduced to writing in a confirming letter or signed by all parties involved in the contract.

Items you may wish to ensure or look out for in a contract:

- 1) Proper dates for meeting rooms and room blocks
- 2) Date of Contract Initiation
- 3) Room rates,³ commitments,⁴ Reservation Procedures, and Cut Off Dates
- 4) Reservations and deposit procedures (deposit timing and amount)
- 5) Cancellation policy
- 6) Taxes
- 7) Gratuities for maids and porters
- 8) Meeting/function rooms to be used and costs
- 9) Recreational costs
- 10) VIP upgrades
- 11) Number of free rooms per number of paid rooms (Complimentary accommodations)
- 12) Services to be provided
- 13) Attrition Clause⁵
- 14) Liquidated Damages Clause⁶

² According to the Statute of Frauds, a contract that cannot be performed under a year or is valued over \$1,000 must be in writing. This means if you enter into a contract for a block of rooms a year and a day in advance of the event, if the contract is not in writing it may not be enforceable. Thus, you may have no legal redress to remedy the situation, should the hotel not honor the negotiated block of rooms.

³ Make sure you get a breakdown of how many rooms will be available by type (Single, Double, Government, etc.), as well as, cost per extra person in each room.

⁴ Pay special attention to any clause in the contract that requires your organization to pay for the entire block of rooms. Negotiate a partial per room penalty or a liquidated damages clause (See footnote ___ below) for rooms not picked up.

⁵ An Attrition Clause defines the damages one must pay to another party in the event one party fails to meet its obligation. An example is if your organization fails to meet its room block. The clause will define what the damages are to the organization. Usually, the damages are higher as the meeting dates draws near. It is also good to make sure that the attrition clause has a mitigation provision. The mitigation provision will force the hotel to reduce or minimize its damages by reselling cancelled or released rooms.

⁶ A Liquidated Damages Clause identifies what the damages will be should a party breach the contract. (i.e. If the Organization cancels this agreement before September 31, 2003, the organization will pay \$5,000.00 in liquidated damages. If the Organization should cancel after said date then the Organization will pay \$7,500.00 in liquidated damages.) This type of clause eliminated the need to calculate damages in the event of a breach. However be aware that this type of Clause is easily enforceable in court and should be thoughtfully entered into.

- 15) Consider an Arbitration Clause
- 16) Cut-off dates for room guarantees and penalties
- 17) Double booking Provisions
- 18) Termination Clause⁷
- 19) Guarantee requirements for food and beverage functions
- 20) Master billing and individual billing (what is covered under the master bill)
- 21) Who is authorized to charge to the master bill
- 22) Hold Harmless Clause⁸

Items to look out for specific for Food and Beverage:

- 1) Make sure that there is a clause related to food and beverage attrition or cancellation or both and if it is applicable.
- 2) If food and beverage attrition or cancellation or both is applicable, make sure to include specific time frames and specific methods for calculating damages.
- 3) Have provisions that cover a food and beverage cancellation, should the entire conference be cancelled.⁹
- 4) The food and beverage should not be included or tied to the room pickup or meeting rooms, they should be independent clauses.
- 5) Damages should be calculated in profits, not cost. Thus make sure the contract defines lost profits (i.e. a percentage or price per meal.)¹⁰

Meeting Tip: Make sure your group gets credit for resold functions. Should a hotel be able to resell a function, the profit generated by the resold function should be credited toward your damages.

When reviewing the contract, make sure that the contract specifies the meeting and function space to be used, as well as, any charges for the space. Should you know the time, the space and the specific rooms to be used make sure you list them in the contract. In addition, should you chose a facility for its specific space be sure to emphasize the importance of the space and provide for alternatives should the space become unavailable.

When reviewing the contract make sure that the contract has a cancellation clause, which sets out the damages should either you or the facility be unable to perform your

⁷ A Termination Clause is a good idea to cover events such as: Renovations, Changes in Management or Ownership, Frustration of Purpose, The Inability to Use A Specific Space, Natural or man made events which may cause cancellation, etc.

⁸ The enforceability of this type of clause depends on each States Law. However, make sure you carefully read this section and make sure that the facility does not disclaim liability for gross negligence.

⁹ Note normally attrition or cancellation clauses cover individual events, not the entire conference.

¹⁰ Damages are intended to make a party whole and not garner a windfall. Thus should you cancel a breakfast that yields \$5.00 profit per person, but costs your organization \$12.00 per person, the damages should only be \$5.00.

duties. Damages are usually minimal at first (i.e. A year prior to the event) and increase as the event draws near.

Meeting Tip: If the facility has a no cancellation policy for you holding the meeting at another establishment, make sure a similar provision is there for the hotel not to cancel for the purpose of booking another group.

Legal issues with speakers:

Sometimes it is necessary to be concerned about the liability resulting from speakers. Your organization may wish to disclaim any ideas and opinions expressed at the meeting and in handouts in promotion material for the meeting. In addition, you may wish to have the speakers sign a, speaker indemnification clause, which requires the speaker to hold harmless and indemnify the organization for any claims made, including copyright violations, resulting from the speakers themselves or their handouts.

(See Appendix VIII and IX for a sample Speaker Agreement and Information Form and the sample Speaker Introduction and Audio Visual Form.)

Basic Insurance Concerns:

Below you will find some of the most basic types of insurance you may wish to secure when planning a meeting. Because every event is different it is always a good idea to consult with your broker or attorney to make sure that you have covered your assets.

Many organizations General Liability policy, or a rider thereof, will cover some aspects of the event. However, you must read through your policy to look at the specific inclusions and exclusions. Your event may have a social function that serves alcohol and many general policies will not cover risks such as this. Therefore you must talk to you insurance broker to find out about separate policies your organization must take out to protect it from certain risks.

In addition, event insurance can be added as a rider to your liability insurance or can be purchased as a separate policy to cover a specific conference or event. In either event notify your agent in advance of the conference or event.

Types of Insurance to understand:

It is always good to make sure that you have adequate **Liability Insurance**. This type of insurance will cover your organization should an individual suffer bodily injury or there is property damage. Another type of insurance to keep in mind is **Cancellation Insurance**. Cancellation Insurance provides protection for the organization should the

event be cancelled by an unexpected occurrence beyond the control of the organization.¹¹ In addition, should you be providing liquor, make sure that the facility or caterer has **Host or Liquor Liability**. If so make sure you have written confirmation of this and ask that the organization be named as a secondary or additional insured party. If coverage is not available make sure you can take out an additional policy or it is covered under the total liability package for the event.

Other types of Insurance and Definitions to keep in mind.

1st Party---covers policyholder for covered loss due to damage or destruction of own property

3rd Party---pays for covered claims due to bodily injury or property damage

Types of insurance you may wish to obtain for meetings

1st— Property
Fire
Auto
Crime (Burglary and Robbery)
Business Interruption
Malpractice
Accidental Death and Dismemberment

3rd— Worker's Compensation
Umbrella Insurance
Errors & Omissions
Directors & Officers
Association Professional Liability
CGL (Products & Liquor Liability)
Malpractice
Accidental Death and Dismemberment

In addition, look at your Commercial General Liability Insurance; this type of insurance may pay for a loss due to covered bodily injury and property damage. Remember to look at your specific policy to ensure it covers actions that may result in your organizations potential share of liability.

Finally, be sure your meeting is covered by name
Add the meeting location
Get the "Per event" endorsement

In addition here are some suggestions for dealing with Insurance:

¹¹ Cancellation Insurance may provide coverage for physical loss to property, as well as, property owned, leased, rented or under the dominion or control of the insured. However, there are many exclusions to this type of policy such as acts of terrorism and acts of nature.

Obtain Insurance:

- Early
- Involve meeting manager
- Compare policies not just prices
- Use an insurance professional
- Identify needed coverage

Other legal items to keep in mind:

When playing music at a meeting, make sure the music is not copyrighted. An Internet search will enable an organization to find non-copyrighted music for use at meetings, if not you must pay a royalty to the owner of the music copyright or obtain a waiver for use of the material. (*See Appendix VII for a sample Audio Recording Permission Form.*)

Most contracts should entail a **Dispute Resolution Clause**. This clause will become effective should a dispute arise. If you have a dispute resolution clause make sure it states they type of resolution that will be used (i.e. arbitration, litigation, etc.) You will also want to make sure it is known who will pay attorney fees, and in what circumstances.

The contract for the hotel or facility should have a clause in it warranting the condition of the facility.¹²

Finally, define a procedure as to how notices are to be given, make sure that there is a severability clause¹³ in the contract, and define the authority of the signatories (including name, title, group name, and date),

Types of laws to review, which vary from state to state:

- 1) Liquor liability law
- 2) State gaming laws (in the event you hold a raffle or auction)

Meeting Tip: Keep a record of all meeting notes, correspondences, and signed contracts in the event there is a dispute.

The legal stuff may seem perplexing and daunting, however, make sure you read all documents carefully prior to signing any of them and make sure all parties understand the terms and conditions in each contract. Most importantly, should you be unsure of anything legal, consult a professional!

¹² Warranting the condition of the facility means that the hotel or facility guarantees that the premise is in the same or better condition that it was at the time of either the on-site visit or signing of the contract.

¹³ A Severability clause is designed to keep the contract enforceable should one or more of the provisions in the contract be deemed unenforceable.

Getting back to basics: The Content of your Meeting!

Did you realize that seminars and conferences are large meetings? Some basic principles apply. Once you have picked the place and dates the next task in meeting planning is to determine what your goals and objectives are. You want to take time and fully define:

- 1) The purpose of the meeting;
- 2) Your Theme or Slogan;
- 3) What you want to accomplish by the end of the meeting;
- 4) What message(s) you want to communicate; and
- 5) Your budget.

Let's start with your purpose...

Are you planning?

An Informational Meeting
A Skill Building Meeting
An Awards Meeting
Or a Combination of all three

Made A Decision?

How about a Theme or Slogan?

A Theme is an idea that communicates an attitude or a mission. The Theme can be based on an event, a place or a person.

And here is a good time to plan a Slogan

Why have a slogan?

A slogan inspires/motivates your meeting participants.

Development of an effective theme can be carried out through decorations, food, entertainment and costumes

Now that you have decided what you want to accomplish, the rallying slogan behind this accomplishment, and the purpose of the meeting, you must decide if the message is appropriate for your target audience.

Remember: This is a Western Regional Meeting and the agenda should reflect the needs of the Region and not necessarily the hosting State or Council!

Meeting Tip: If you are holding a regional meeting with council and board members, rather than having a general session for board development you may wish to have simultaneous breakout sessions for board development and council member responsibilities.

After you have figured out the basic parameters for the meeting, you must now figure out what is the best way to communicate your message(s). Below are some examples of how to do this:

- 1) Multi-media presentations such as PowerPoint¹⁴ or Video
- 2) Live Speakers
- 3) Overhead Slides
- 4) Hands-on demonstrations
- 5) Audience Participation
- 6) Or a mix of the above

Ok have some ideas, consider speakers...

Speakers generally come from inside your organization or are hired professionals or may be celebrity or guest speakers....

Remember to provide your speaker with information that is targeted to your audience and the purpose of the meeting.

(See Appendix XI for a sample Speaker Invite Letter.)

Meeting Tip: The easiest way to manage speakers is to have one person be responsible to act as the host for one specific speaker.

Speaker arrangements should be made well in advance of the meeting.

Are you providing accommodations and travel?

Free

No -- then explain billing procedures and fees ahead of time.....

Meeting Tip: When booking speakers make sure that you are clear on dates, times, travel arrangements (airfare, lodging, and meals), and any fees that you are expected to pay.

Make sure that you memorialize all arrangements in writing and either have both parties sign the memorialization or send a confirming letter, which outlines the arrangements as you understand them.

Ask for biographical information from the speaker and plan how this speaker relates to the topic....

¹⁴ PowerPoint is a registered trademark of the Microsoft Corporation

Does your speaker have?

A Title

A Degree

Awards

Publications

This makes for easier planned introductions....

Some speakers have a prepared introduction

If not remember to include

Who is the speaker?

Why is the speaker here?

What will he/she speak about?

Why will your audience care?

Make sure you give the speaker the parameters you would like them to work within.

Some examples:

Time allotment

Limit the speakers to 6 slides per 15 to 20 minutes (This will force the speaker to become more concise)

Finally, be prepared for last minute changes (especially politicians)

Do you have a back up plan???

(See Appendix VIII and IX for a sample Speaker Agreement and Information Form and the sample Speaker Introduction and Audio Visual Form.)

Now that you are well on your way to planning the meeting who should you invite?

Did you invite?

All Council members in your region

All RC&D Coordinators in your region

All NRCS and Council Staff

All State Association Presidents

All State Conservationists

Supporters of the RC&D program (including non-profits and Gov't Agencies)

NARC&DC Board or Staff

Families of the above

Volunteers who have worked on or supported council projects

Local and state legislators

Members of the local media

Getting Sponsors!

A great way to build the host Councils/State/Regional coffers or supplement to reduce registration rates for your attendees is to obtain sponsors. Sponsorship levels can come in all shapes and sizes. Companies, organizations, and individuals can sponsor coffee breaks, advertising tables, exhibits, and lunches. In addition, the sponsoring company, organization, or individual can have their information posted on signs, banners, table tent cards, or in the program and recognition or free advertising.

Below is just one example of how to advertise for sponsors for your Regional meeting. Please note that this is just one example and there are many ways to obtain sponsors, you just have to use your imagination.

Platinum Sponsorship

The Platinum Sponsorship package is the premier Sponsorship. It offers the sponsor prominent positions in marketing material and at the conference itself, your name on our conference give away, and up to X complimentary or discounted registrations. Platinum Sponsorships can be combined with other sponsorship packages to maximize value and exposure at our conference.

Gold Sponsorship

Provides the sponsor prominent positions in marketing material and at the conference itself, and Y complimentary or discounted registrations.

Cocktail Reception Sponsorship

The Cocktail Reception Sponsorship provides prominent advertising or recognition during cocktail reception and is encouraged to make brief opening comments before personally introducing yourself to attendees.

Luncheon Sponsorship

The Luncheons Sponsorship provides an opportunity in the middle of the day to offer recognition or advertisement during on the main events during our conference. You will be offered an opportunity to speak at this event and demonstrate how your company can play a direct role in the RC&D Community.

Morning and/or Afternoon Network Break Sponsorship

Breaks in the intense pace of conferences are valuable as networking time. By sponsoring a break, your company will be prominently displayed.

Tabletop Exhibit

With a tabletop exhibit, your company gets the opportunity to display your product in a prominent place and discuss it with attendees.

Goodie Sponsorship

With a Goodie sponsorship you can advertise on one of our main conference giveaways (List Giveaways). Have your logo prominently displayed by all participants during the conference.

As noted above, displays are also a great way of incorporating sponsors in your Conference. When offering to have vendors display, make sure the hotel or conference center can accommodate the set up of the display. Sometimes all you will need is a prominent hallway and tables with drapes or you may wish for single or multiple rooms with tables, chairs and drapes. (For more information on this topic see picking a hotel above).

Here is an example of a past Western Association Call for Sponsors

Organizations or businesses wishing to present their services may register as a conference vendor for \$300. Space must be reserved by _____. *No space reservations will be accepted after this date.* Registration includes meals, activities, workshops, table, chairs and electricity if needed. The trade fair will be held directly adjacent to all conference events. Contact _____ for more information. See **registration form** for space reservation.

The Program!

Now it is time to generate your generic “Game Plan.”

After you have designed the basis for the meeting you must now develop a meeting concept and theme to be used in everything from the initial announcement mailings to the closing ceremony. Once you've settled on a concept and theme, design a theme logo or a slogan.¹⁵

- 1) Begin development and scripting of thematic audio-visual and live components, design of the announcements/ invitations, stage-set and other graphics.
- 2) Establish a timetable for creation, approvals, revisions, production and shipping of all elements of the meeting program and related collateral materials. Allow plenty of time for artwork, photography and other materials needed for slides and videos.
- 3) Announcements or invitations and promotional follow-up mailings should go out well in advance of hotel cut-off dates for room and F & B guarantees, and should state a specific deadline for reservations, at least a week before the hotel's cut-off date.
- 4) Decide on topics to be covered by speakers and who the presenters will be. Begin speech writing and development of speakers' support audio-visuals. Estimate the amount of time each speaker will need. If your presenters are new to public speaking, consider a speech coach or workshop to help them make their presentations look and sound more professional. If your audience is fairly large, consider Teleprompters, which can help any speaker by eliminating the need to fumble through notes or scripts at the podium and allowing them to focus on the speech itself. **Remember: This is a Western Regional Meeting and the topics should reflect the needs of the Region and not necessarily the hosting State or Council!**
- 5) Develop a production schedule for collateral materials such as new product brochures, as well as materials specifically for the meeting like name badges, luggage tags, travel information, and arrival packages.
- 6) If you're planning a display area for products or services, set up a separate schedule for the necessary display materials.
- 7) Set dates for speakers' rehearsals both at your offices (or those of your producer) and on-site. Schedule a technical rehearsal with the audio-visual crew, and a final dress rehearsal involving both the tech crew and all speakers. Don't let your speakers arrive at the last minute and go on-stage without any rest or rehearsal, no matter how experienced they are. And be sure that your speakers understand the importance of cues, if their support materials depend on them. Ad libs are fine, so long as the speaker doesn't throw away a cue that the backstage manager needs to properly call the show and leaves everyone struggling.

¹⁵ The list has been adapted from the Motivational Marketing Associates 1996

Lets Review:

Have you prepared?

Your purpose

Your content

Your marketing design

Your presentation

The Agenda

One of the most important things to remember when planning out a meeting is not to overload an agenda. If the meeting is too packed then the members could be overwhelmed and end up disappointed with the conference. Below are some suggested timing guidelines when planning your meetings agenda.

Meeting Tip: The Agenda

Brainstorming:	one to two hours per topic
Progress Reports:	15-18 minutes per speaker
Small Group Breakouts	45 to 90 minutes depending on tasks and numbers
Breaks	15-30 minutes based upon the size of the group

Remember that breaks are important. This is where many individuals can begin to network, share ideas, and follow up on discussions.

Another tip is to make sure you have a draft agenda out to your membership when you advertise the conference. Remember! Almost no one will sign up for a conference when they have no idea of the content.

A typical Western Regional Meeting agenda is as follows:

SUNDAY

12:00 – 5:00 pm	General Registration and Vendor Set Up
1:30 – 3:30 pm	Western Association Committee Meetings
3:30 – 5:00 pm	Western Board of Directors Meeting
6:00 pm	President’s Reception

MONDAY

7:00 a.m.	General Registration and Exhibits
8:00 – 8:45 a.m.	Welcome
8:45 – 9:30 a.m.	Keynote Speaker
9:30 – 10:00 a.m.	BREAK
10:00 – 10:30 a.m.	Western Association Leadership Reports
10:30 – 12:00 p.m.	Topical Presentation Based upon the Focus of the Conference
12:00 – 1:30 p.m.	Lunch & Speaker
1:45 – 3:00 p.m.	RC&D Success Stories Based upon the Focus of the Conference
3:00 – 3:30 p.m.	BREAK
3:30 – 5:00 p.m.	Topical Presentation Based upon the Focus of the Conference
5:00 – 5:30 p.m.	RC&D Success Stories Based upon the Focus of the Conference
5:30 p.m.	Dinner Provided or On Your Own

TUESDAY

7:00 a.m.

Registration Continues

8:00 a.m. – 12:00 p.m.

Western Association Business Meeting and
NRCS Employee Meeting

12:00 – 1:30 pm

Lunch and Awards Ceremony

1:45 – 3:00 p.m.

Topical Speaker

3:00 – 3:30 p.m.

BREAK

3:30 – 4:15 p.m.

Topical Speaker, RC&D Success Stories or
Workshops

4:15 – 5:30 p.m.

Topical Speaker, RC&D Success Stories or
Workshops

6:00 p.m.

Banquet/No Host Bar/Auction

WEDNESDAY

7:00 a.m.

Breakfast Buffet

8:00 – 9:00 a.m.

Topical Speaker, RC&D Success Stories or
Workshops

9:00 – 9:30 a.m.

BREAK

9:30 – 10:30 a.m.

Leadership Building Session or Panel Discussion

10:30 – 11:30 a.m.

Topical Speaker, RC&D Success Stories or
Workshops

11:30 – 1:00 p.m.

Lunch Speaker and Closing

Finally, make sure that you stick to your agenda, start and end on time!

Success Stories

Historically the Western Association's Regional Meeting provides time for Councils to highlight their successes. A Success Story session or multiple sessions is a great way to accomplish this. Below are the steps for planning a success story session:

- Step 1: Advertise a Call For Success Stories prior to the conference. Typically this is done when you send out your registration announcements. A typical announcement should state the type of stories you are looking for (especially if your conference is highlighting a specific issue, such as energy, forestry, diversity, etc.). A deadline for submitting Council success story proposals, and state how long you would like each presentation to be. Typically each presentation is 15 to 30 minutes.
- Step 2: After the deadline for accepting proposals has passed, review each proposal, rank them, and then place them into the schedule in order of ranking until all time slots have been filled.
- Step 3: Contact each success story presenter to confirm the presentation and have them submit a brief synopsis of their success story (only if you plan on publishing this information in your attendee packets) and a brief biography so they can be properly introduced. Also, remind the presenter of their time allotment for the presentation and find out what A/V needs they might have.
- Step 4: Assign a moderator to introduce each success story and to help the presenter end the success story should they run over the time allotted.

Here is an example of a past Western Association Call for Success Stories

We are encouraging all RC&D Councils to share their accomplishments with us at the conference. We have a goal of sharing a "Success Story" from every Council in the Western Association. Due to the limited amount of time and the amount of information that we have to squeeze into the conference, we won't be able to have every success story presented to the group. However, we are going to select a dozen or so for presentation opportunities. The remainder of the success stories will be printed in a booklet for everybody to take home and everybody also has the opportunity to bring a poster for display if they would like to do so. **Please contact _____ no later than _____ if you will be submitting a success story for presentation consideration.** Success stories to include in booklet can be sent as late as _____.

The Registration Form

One item that is easily overlooked when preparing a meeting or conference is the registration form. The registration form should be easy to fill out and the fees should be easy to calculate.

Meeting Tip: Registration forms should be one page documents, not double sided for ease of faxing.

Items to include on your registration form:

- 1) Name (First, Middle, Last) (Also preferred name on Badge)
- 2) Prefix or Suffix
- 3) Home Address (Street, City, State, Zip)
- 4) Preferred Address (Street, City, State, Zip)
- 5) Phone and Fax Numbers
- 6) Organization or Council
- 7) E-Mail Address
- 8) Registration Category (If you have member, non-member, student, or guest registration. Also categorize *early*, *normal*, or *late* registration) *
- 9) Fees* (Define if any events, tours, social functions, etc. are extra)
- 10) Choice of sessions if multiple or concurrent sessions (You may wish to have participants sign up for second or third choices)
- 11) Comment section for special needs, including dietary
- 12) Method of payment section
- 13) Clearly state your cancellation and refund policy, if any
- 14) State the hotel accommodations and cut off dates
- 15) If the participant wishes to volunteer (*See appendix XII for a sample Volunteer Form.*)

*Meeting Tip: Set a cut-off date for registration. A late registration charge encourages early registration and gives you more accurate attendee counts.

*Note: For the Western Annual Meeting the split for profit/loss for the hosting Council/State and the Region is a 25% (Council/State) to 75% (Region). (This is for any profit or loss, excluding the auction proceeds).

Also, the Western Association of RC&D Councils provides to the hosting State/Council a 5,000.00 interest free loan due and payable after the conference is completed

Getting The Word Out!

Advertising, Advertise, Advertise!

In order to have a successful meeting you must have a successful marketing campaign. A Successful marketing campaign can increase your attendance. This can be done through¹⁶:

- 1) Post the meeting dates on the Western Association of RC&D Councils Web page (<http://www.westernrcd.org/>)
 - a. You can contact Kathy Dingman at 208-762-4939 x 114 or at webmaster@westernrcd.org to post your information on the Western Association of RC&D Councils Web page.
- 2) Advance Press Coverage
- 3) Pre-meeting publicity in the form of newsletters to the Councils in the Western Region.
 - a. Save the date cards.
 - b. Pre-registration/early registration forms.
 - c. Draft agendas.
 - d. Flyers on the local accommodations for the meeting.
 - e. Flyers about the meeting.
- 4) Press kits with transcripts and photos
- 5) A follow-up newsletter for participants and others
- 6) Post meeting press kits to Councils that did not attend.

Meeting Tip: When advertising and planning the Regional Conference: DO NOT REINVENT THE WHEEL! Contact the past conference hosts and find out what they did, how they did it, and obtain their mailing lists as they are most likely the most current lists available.

How to create a successful marketing campaign:

To create you need

Title of your Program

Title

Is it a grabber?? Will it draw attention?

An outline or a description

Dates

Time

Place

Fees

Registration Information

¹⁶ The list has been adapted from the Motivational Marketing Associates 1996

Develop your promotional Strategy

Include

Who

What

Where

Why

When

Know your

Program

Price

Place

Promotion types: Mail, Internet, E-Mail, Etc.

Develop your promotional Schedule

First mailing—an alert

Before event

Send with regular mailing

Or/And

Use your newsletter

Short article or an advertisement

Follow up with detailed brochure that includes

Benefits of attendance

Exciting Program

Easy registration

The final mailing should be the reminder and note the cutoff dates.

Meeting Tip: According to Professional Convention Management Association's Ninth Annual Meetings Marketing Survey, People need to see your message at least three times before they act. Thus, it is always good to do at least three separate mailing for your meeting.

(See appendix I and II for a sample Meeting Planning Checklist and the Regional Meeting Timeline.)

Typical schedule may include

One year notice.... hold that date

120 Days...Preliminary agenda or program

60 Days ...Final agenda or program
30 Days ...Reminder

Brochure

Be creative and Give Complete Information

Your Cover should include:

Type of Event

Title

Dates

Sponsored By

Remember after the event to evaluate your promotion

Communication is the Key to Success....

Planning is Necessary...

But Success Depends on Communication

Auctions

Auctions are a great way to add excitement to your conference and allow your conference attendees and speakers to meet new people! Auctions—both live or silent provide people with wonderful free entertainment! In addition, it allows people to meet and chat with others, often discovering a shared interest and a new friend or item. The crowd itself generates an air of excitement, especially when several excited bidders pounce on the same item.

Historically, the auction proceeds go directly to the Western Association of RC&D Councils.

Steps for holding an auction:

- Step 1: Decide to hold the auction.
- Step 2: Select time, place, and type of auction (Silent or Live).
- Step 3: Plan ahead. Designate an auction chairperson to be in charge of collecting items, advertising, etc.
- Step 4: Procurement of auction items.
- Step 5: Advertise the auction let your conference participants know to bring auction items to the conference.
- Step 6: Auction arrangements. Contact the hotel to make sure you have a secure place to hold all auction items, make sure you have a room that will allow for many people to easily filter in and out of. Make sure you have enough tables to display the items and if you are doing a silent auction make sure you have enough tables for display and bidding. Also, include pens near each item to allow for ample bidding. Make an inventory list of all auction items.
- Step 7: Preparing items for bidding. Make sure all items are properly tagged and that there is a minimum bid if necessary. It is a good idea to number each item and have a bidding sheet reflect that item number. This will assist you when the auction is over and you need to collect the auction monies. For silent auctions make sure each item is properly marked and each bidding sheet in numbered to reflect the item. Assign a volunteer to remain in the auction area whenever bids are being taken, and make sure the auction items are secured in the evening.
- Step 8: Bidding Procedures. Make up a set of rules and announce these rules or post these rules to the members. Rules should include how to bid, as well as, retract bids.
- Step 9: Ending the Auction. It is a good idea to announce a starting time and ending time for your auction. In addition, let members know how to purchase items won via the auction. When the auction end make sure you have cash to make change for winning bidders, and have enough people to accept monies and provide receipts.

Here is an example of a past Western Association Advertisement for Auction Items

Just a reminder that we are asking each RC&D Council to donate one regular auction item or one silent auction item as well as a door prize. You may send auction and door prize items in advance to: (NAME OF HOST COUNCIL), with a description of each item, donated by whom and a value of the donated item. Otherwise, please bring items with you to the conference and turn it in at the registration desk. The auction proceeds will benefit the Western RC&D Association.

Every good conference has some type of attendee packet. But what should an attendee packet contain? Below is a list of what you should have in an attendee packet (The packet can be in the form of a binder, stapled handouts, etc.):

- 1) Agenda
- 2) Mission or Purpose of Meeting contained in a welcome letter from the leadership
- 3) Welcome letter from the host Council/State
- 4) List of attendees (Note: Do not distribute the attendee contact information, unless you have their consent to do so.)
- 5) Description of workshops, success story sessions, etc.
- 6) Name Badges
- 7) Tickets to special events, if any
- 8) Biographies of speakers
- 9) Local area attractions
- 10) Auction information and rules
- 11) Sponsorship goodies, if any

Final On-site Preparation:

Prior to the conference you should arrive a few days, or hours, early to ensure the following¹⁷:

- 1) Find out who will be your contacts within the hotel or at outside suppliers at all times of the day or night, if problems crop up. Record their office, car and (if possible) home phone and intercom "beeper" numbers.
- 2) Meet as a group with hotel staff and other suppliers involved in all aspects of the meeting to review the program and agenda from start to finish: Transfers, cancellations, A/V requirements, Food & Beverage functions, room set-ups and turnaround times, changes requested previously, etc., to be absolutely certain every one is on the same wave length.
- 3) Bring along a list of contacts, including home phone numbers, of anyone you may need to reach about lost shipments or other last minute crises.
- 4) Inventory all shipments to be certain what you shipped has been delivered. If anything is missing, have it traced or replaced ASAP.
- 5) If an outsider will introduce your speakers, or vice versa, be sure they understand the pronunciation of the person's name and title. If VIP guests are to be introduced, be sure they are in attendance. If there are last minute additions to the VIP introductions list be sure your presenter is aware of them.
- 6) Do a last minute check of the meeting room for lighting, temperature, water (at the podium and for attendees), pads, pencils, and any other special requirements such as a pointer or gavel.
- 7) Make sure that you have set aside seats for your VIPs and Speakers. This can usually be done by using tape, ribbon, or signage.

¹⁷ The list has been adapted from the Motivational Marketing Associates 1996

Logistics to Make the Meeting Run Smooth

Below are some simple thoughts to help make your meeting more enjoyable for you and your attendees.

- 1) Never leave break station or registration doors open near the meeting;
- 2) Always have a backup plan in the event that a scheduled outdoor activity encounters rain;
- 3) Always have a backup plan in the event that more attendees arrive than expected. (i.e. contact a local hotel to arrange for additional rooms, attempt to obtain a larger meeting room or have additional seating brought in, break-up the meetings into attendees and guests, etc.);
- 4) At the end of the meeting have the audience evaluate the meeting. This will allow you to identify where you may wish to improve for future events. The evaluation should include suggestions on meeting format, accessibility issues, facility issues, quality of speakers, etc. Make sure that you leave time at the end of the meeting for the evaluations, as people tend to leave the meeting without completing them. In addition, if you want specific information on components of the meeting make sure you hand out evaluations at the end of the day or after each component. Finally, keep in mind those with disabilities and have scribes available to help them fill out the form; and
- 5) Before you leave the facility make sure that you resolve any disputes or complaints with the facility. Remember once you leave the facility you will lose some of your negotiating power and negotiation becomes more difficult.
- 6) Prepare a staging guide. (*See appendix VI for a sample Staging Guide.*)

The Final Step of Your Meeting; The Dreaded Bill Review!

As the saying goes, all good things must come to an end. And with the end of the conference comes the dreaded bill review. Although, this may seem tedious, reviewing the bill could save you hundreds of dollars. Below are some things to look for when performing your final bill review.

- Review the final bill to ensure that there are no major errors;
- Compare the final bill to all known expenditures;
- Review to ensure that you or someone acting as your agent has authorized each charge of the final bill;
- Make sure you have received the proper tax credit for the tax exempt status of your organization; and
- Make sure you have received the proper credits for deposits, complimentary rooms, etc.
- Make sure you know how many comp rooms were earned and that all were applied to your bill.

What should you do if you find a mistake? Contact the accounting department, the hotel manager, and your meeting manager, in writing, as soon as the mistake is realized. Make sure you fully explain:

- 1) What is the dispute;
- 2) Why you feel there is an error;
- 3) A statement of the undisputed balance, while enclosing a check for the undisputed balance; and
- 4) A statement concerning that once the dispute is satisfactorily resolved by all effected parties, the final payment will be made in X days. (Note the usual and customary term of payment is thirty days.)

Final Thoughts

The National Association of Resource Conservation and Development Councils hopes that this guide will assist you in your endeavors to plan a successful business meeting or other special event. We hope that you have found this book easy to use, as well as, a valuable asset to your meeting-planning arsenal. Should you need any additional assistance in your meeting planning efforts, please do not hesitate to contact your National Association.

Appendix I

Meeting Planning the Checklist (The Basics)

- 1). Gather information from previous host site – hotel room pick-up; format of meeting; registration fee charged; lessons learned

- 2). Create a notebook of lessons learned and observations throughout the meeting planning, as well as, the meeting to make the end evaluation more meaningful, accurate and easier.

- 2). Planning Meeting – 12 months out
 - Establish framework for meeting – Regional President and host Committee hold meeting via teleconference to discuss overall meeting format; purpose and establish procedures for decision-making and financial managements
 - Suggested agenda for teleconference:
 - Theme
 - Format – Agree on subjects; format of meeting; length of meeting
 - Type of training needed?
 - Number and timing of Business Sessions?
 - Do rooms need to be set aside for committee meetings and state meetings?
 - Will you have Tours?
 - Will you seek Exhibitors and Sponsors?
 - Decision-making and financial management – determine roles of host site versus President and Executive Board of Region
 - Who makes decisions?
 - Who signs contracts?
 - Who handles finances? PUT IT IN WRITING
 - Make sure agreement is understood on who holds bank accounts;
 - procedures for reimbursement, distribution of profit or loss

- 3). Draft RFP for Site Selection (see sample RFP in Appendix V)
 - Include:
 - Expected number of participants
 - Flow of room block
 - Space Requirements for Meetings
 - Meals and Snacks needed (HINT: Hotels make their money on meals. If you can guarantee a number of meals in contract you may keep room rates down.
 - Comp guest rooms; comp suites and comp meeting rooms expected

- 4). Review site proposal and select site – be sure to check on cancellation procedures and attrition clauses
 - HINT: attrition is a growing problem with hotel contracts. Be sure you give an accurate count of numbers in attendance. You will be responsible for costs if you do not meet projected room block requirements.

- 5). Start Preparation of Staging Guide (See Appendix VI)
- 6). Create budget for event
- 7). Set up committees: Assign tasks and timelines for those committees
Suggested Committees:
 - Executive Committee
 - Planning Committee
 - Program Committee
 - Communications Committee
 - Food/Entertainment Committee
 - Volunteer Committee
 - Local Host Committee
 - Transportation Committee
 - Exhibit and Sponsor Committee
 - Family/Guest Committee
 - Awards/Scholarship Committee
 - Site Committee
 - Logistics Committee
- 8). Set up Timeline (See Appendix II)
- 9). Report on Status of Activities:
 - One time per month 10 to 5 months out
 - Two times per month 4 to 2 months out
 - One time per week 1 month out to date of meeting
- 10). One week to two days prior to meeting go out to site for final preparation check.
- 11). Up to one month after meeting, evaluate all aspects of the meeting and note both positive and negatives of the meeting for better performance at future meetings.

Appendix II

Regional Meeting (12 Month Out) Timeline

(Sample timeline based upon a January 16th 2003 Meeting Date)

DATE	ITEM TO BE DONE	PERSON OR COMMITTEE RESPONSIBLE	CHECK OFF WHEN DONE
1/3/2003	Set Theme		
1/10/2003	Site criteria to Council Planning Committee Chair		
1/12/2003	Draft Budget		
1/15/2003	Determine room availability for facilities		
1/21/2003	Publication Production schedules written		
1/21/2003	Marketing plan drafted		
1/30/2003	Keynote speaker selected		
1/30/2003	Assign transportation person		
1/30/2003	Assign Exhibits and Sponsor person		
1/30/2003	Appoint Program person		
1/30/2003	Set Schedule of Events for Conference		
2/4/2003	Set conference goals and objectives		
2/22/2003	Appoint Auction Person		
2/25/2003	Advertise to media and post on web site		
3/1/2003	Hold staff block at hotel		
3/1/2003	Finalize job descriptions for volunteers		
3/1/2003	Finalize volunteer plan		
3/1/2003	Solicit bids for tours		
3/1/2003	Develop lists of scholarships and awards desired		
3/1/2003	Distribute Call for Council Story Submissions (Success Stories)		
4/1/2003	Create transportation plan		
4/1/2003	Submit Tour contract to Regional		
4/1/2003	Review exhibit prospectus text from		
4/1/2003	Secure volunteers to assist with the review of Success Stories		
4/2/2003	Social event site selected		
5/1/2003	Publicize schedule/content		
5/1/2003	Publicize listing press release		
5/1/2003	Exhibit Prospectus mailed		
5/1/2003	Begin to recruit volunteers		

5/1/2003	Obtain conference insurance		
5/1/2003	Menus finalized		
5/1/2003	Develop volunteer schedule		
5/1/2003	Put tour registration information on website		
5/1/2003	Send letters requesting support to potential sponsors		
5/1/2003	Assess scholarship needs		
5/1/2003	Secure sponsorships for scholarships		
5/1/2003	Begin to receive, review, and schedule Success Stories		
6/3/2003	Begin volunteer database		
6/3/2003	Submit price estimates for conference gifts		
6/3/2003	Finalize entertainment		
6/1/2003	Finalize gifts/awards		
6/3/2003	Submit tour descriptions and registration info for brochures		
6/1/2003	Finalize Success Story Schedule - send list of acceptance to Regional President/Meeting Planner		
6/15/2003	Send confirmation letters to success story presenters		
7/2/2003	Determine format for Proceedings and budget		
7/4/2003	Gifts (Tote Bags, etc.) ordered		
7/1/2003	Menus Drafted		
7/5/2003	Session text for registration brochure due		
7/6/2003	AV contract signed		
7/6/2003	Speaker contracts		
7/6/2003	Speaker housing, handout, info forms		
7/6/2003	Registration form for brochures and web		
7/9/2003	Master account set up		
7/16/2003	Staging guide drafted		
8/20/2003	Order on-site mail, copy, fax service		
8/30/2003	Badges ordered		
8/30/2003	Assign VIP manager		
9/3/2003	AV requirements due		
9/3/2003	Exhibitor reminder mailing		
9/3/2003	Contact VIPs to ensure that travel arrangements have been made		
9/3/2003	Develop Awards Banquet schedule		
9/3/2003	Develop Awards Banquet seating plan		
10/3/2003	Work with Regional President/Meeting Planner to have proceedings published		
10/14/2003	Registration Confirmation letter/inserts		

	finalized		
10/14/2003	Order ribbons and registration supplies		
11/1/2003	Registration floor plan drafted		
11/1/2003	Registration brochure mailed		
11/1/2003	Awards ordered		
11/2/2003	General Session Script drafted		
12/1/2003	Housing Reservation requests due to Regional President/Meeting Planner		
12/1/2003	Finalize moderator selections		
12/1/2003	Finalize VIP receptions		
12/1/2003	Review sponsorship list and ensure that perks are delivered		
12/9/2003	On-Site program text due		
12/15/2003	Notify moderators of their session assignments		
1/2/2004	Submit media room requirements to Regional President/Meeting Planner		
1/2/2004	Shipping info distributed		
1/2/2004	Electricity/phones ordered		
1/2/2004	Staging guide finalized/sent		
1/2/2004	Attendee packets finalized		
1/2/2004	Ribbon lists developed		
1/2/2004	Registration computers ordered		
1/2/2004	Develop safety plan		
1/16/2004	Master account housing submitted		
1/1/2004	Train on-site volunteers		
1/1/2004	Exhibitor on-site info sheet		
1/2/2004	On-Site check request list		
1/10/2004	Guarantees reviewed		
1/15/2004	Registration packet stuffing		
1/15/2004	Speaker thank yous, evaluations		

Appendix III

Site Selection – For Assessing Proposals and Walk Through of Potential Sites

Name of Property:

Rating:

Location/City:

Anticipated Dates for Event:

Distance from Airport?

Train?

Highway?

Accessible?

Hotel Policies?

Contact person and email address:

Guest Rooms:

Room Rate:

Tax:

Room type:

Double Bedded:

#King/Queen Bedded:

Date of Last Room Renovation:

Sitting Areas/Couches:

Patio/Balcony:

Well-lit:

Amenities:(Check all that apply)

- Shampoo etc
- Robes
- In room Safe
- Hairdryer
- Clock Radio
- TV
- Remote Control
- Coffee/Tea maker
- Ironing Board and Iron
- Cable
- Movie Access
- Morning Paper
- Voice Mail
- Data Ports

Non-Smoking Rooms:

Telephone Access Charges: (Local & Long Distance)

Rooms Grouped Together?

How early will guest rooms be available on arrival?

Check In /time_____ Check Out Time _____

How accessible to elevators?

ADA Compliant?

LOBBY

Condition of Lobby (seating areas etc)

How close is front desk to entrance?

Is the Front Desk Well Staffed???

Do guests seem to be waiting in line?

Concierge?

Bellman?

Hotel Gift Shop Hours:

Other shops on property?

Elevators easily accessed from lobby?

PARKING

Available Self-Parking?

Valet Parking?

Cost Per Day?

In/Out Privileges?

Banquet Room/Food & Beverage

Tax:

Gratuity:

Number of restaurants on property?

Names: Hours

Number of bars on property:

Names: Hours

**Room Service Available:
Times:**

Banquet Room

Type of meal:

Number Served:

Meeting Space—Registration Area

Meeting space easily accessible from sleeping rooms?

Meeting rooms are ADA Compliant?

Condition of Carpets, Drapes, etc?

Are renovations scheduled prior to/ during our program?

Ballroom:

Total square feet?

Ceiling height?

Obstructions with pillars or chandeliers?

Accommodate a dance floor?

Able to set up projection?

Break out Rooms:

Total Number?

Average Square feet?

Number with solid walls?

Number with partitions?

Built in screens?

Electric?

Registration Area:

Built in Counters?

Area available for registration?

How close to meeting space?

Conference office?

Conference Storage?

Dedicated Telephone lines

Media Room

Availability?

Equipment?

Business Office (Center)

**Equipment
Costs?
Hours?**

Health Facilities

Type:

Hours?

Staff on site?

Cost?

Pool?	Indoor	Outdoor
--------------	---------------	----------------

Golf Course?		Cost
---------------------	--	-------------

Putting green?		Cost
-----------------------	--	-------------

Rentals?		Cost
-----------------	--	-------------

Tennis Courts?		Cost
-----------------------	--	-------------

Other?

Security:

Type of key System?

Safety chain on door?

Deadbolts?

Restricted access to guest room floors?

Uniformed Security?

Video Surveillance?

Public Address System?

Hallways and Staircases well lit?

Fire exits well marked?

How often are fire alarms checked in guest rooms?

Sprinklers?

Hotel Emergency Plan?

Available for Review?

Arrangements for Medical Emergencies?

Staff trained in CPR?

Staff trained in first aid?

Hotel Staff:

Union?

Convention Service Manager assigned?

If not, name of Liaison?

Will he/she be available when group is on-site?

Gratuities? Individual? Blanket?

Gifts to Room? Charge?

Do you use in-site companies?

If so, are we required to use their services?

Services they provide?

OTHER:

Other groups scheduled at same time?

Additional comments:

Appendix IV

Budget Items—Lists to Help You Remember

Income:

Registration:

- Full paying x \$
- Partial paying x \$
- Spouses x \$
- Speakers x ?
- Guests x ?
- Organization Leaders x ?
- Exhibits x \$
- Staff x 0
- Sponsor \$
- Contributor \$
- \$ Other

Total \$ _____

Total Bodies _____

For guarantees and planning needs, don't lose track of the body count. It does not necessarily relate to paid registrations.

Expenses:

- Food and Beverages
- Guarantees
- Gratuities/Taxes
- Surcharges for Special Events
- Bar/Bartenders
- Centerpieces

- **Signs**
- **Travel to and from**
- **Photographer**
- **Print Material (Menu, Program etc)**

Speakers/Presenters:

- **Fees**
- **Expenses**
- **Audio/Visual**
- **Handouts**

Facility:

- **Meeting room charges**
- **Room sets, Labor, Partitions, Risers**
- **Audio/Visual**
- **Signage**
- **Telephone/Fax**
- **Printing/Duplication**
- **Sponsored Events**
- **Lighting/Staging and Labor to Deliver (Don't forget rehearsals)**
- **Security**
- **Cleaning**
- **Flipcharts etc**
- **Room Provisions**
- **Staff Gratuities**

- **License and Fees**

Audio/Visual:

- **General Sessions**
- **Educational Sessions**
- **Ready Rooms**
- **Leadership meetings**

Recreation/Information:

- **Badges**
- **Program Books**
- **Other Print Material**
- **Ribbons**
- **Computer Equipment**
- **Tickets**
- **Personnel**
- **Decorations**
- **Service Desks**

Transportation:

- **Shipping**
- **Airfare (Staff, Speakers, Leadership etc)**
- **Parking**
- **Airport Shuttle**
- **Cars**
- **To off site events**

Printing and Postage:

- **Advance Promotion**
- **Registration Materials**
- **Signage**
- **General Correspondence**
- **Handouts**
- **Special Notices**
- **Confirmation Letters to Attendees**
- **Forms and Documents**
- **Evaluation Forms**
- **Visitor Information**

OTHER BUDGET ITEMS TO REMEMBER

Staging and Decorations:

- **Drapes**
- **Risers**
- **Lighting and Sound**
- **Podium /signs**
- **A/V Mixer –Operator**
- **Electricity/Extensions**
- **Pads, Pencils**
- **Water**
- **Other room supplies**

Fees:

- **Legal/Contract**
- **Music Licensing**
- **Union personnel and union requirements**
- **Trash**
- **Insurance Riders for Special Events**

- **Entertainment Fees**
- **Furniture/Equipment Rentals**

And Don't Forget These Expenses

- **Site Inspections**
- **Committee/Board meetings**
- **Planning Meetings (& Coffee)**
- **Last Minute Printing**
- **Copy Machine (and paper)**
- **News Releases**
- **Vip/Speaker Gifts**
- **Local Taxes**
- **Banners**
- **Cash Boxes**
- **Receipts**
- **Charge Card Material**
- **Other Supplies**
- **Other Expenses**

Appendix V

Speaker Audio/Visual Requirements Form

Date:

Presentation:

Location:

Time:

Presenter: _____

Audio Visual Requirements

Microphone:

- Fixed with Table
- Fixed with Podium
- Free Standing Floor
- Omni directional
- Lavalier
- Hand held (Wired)
- Cordless
- Table # _____

Visual

- Overhead Projector
 - Screen
 - Flipchart/Markers
 - Laptop
 - LCD
 - Audio Cassette Playback
 - Video Playback
 - Slide Projector
 - Other (Please Be
Specific) _____
-

Please return form to:

Thank you! We are looking forward to your presentation.

Appendix VI

Staging Guide *(Sample Basic Version)*

Event:

Date:

Location:

Room:

Doors Open:

Begins:

Ends:

Expected Audience:

A/V:

Decorations:

Staff in Charge:

Tickets? Yes No (Please circle correct answer)

Set up style:

Set for #

Head Table #

Diagram:



Additional Instructions:

XYZ RC&D Council
(Sample Advanced Version)

Regional Meeting
(Insert Hotel Name)

(Insert Date)

STAGING GUIDE
Revised (Insert Date and Time)

Contact Information

XYZ RC&D Council: (Insert contact name, address, telephone, fax, and E-mail address. Also, insert alternate contacts information)

Hotel #1: (Insert Hotel Contact Information)

Hotel #2: (Insert Additional Hotel Information Here If Necessary)

Budget \$XXXX.XX for total event

(INSERT DATE)

Registration and Exhibits

7:30 am – 5:30 pm

1 8' draped table, 2 chairs, wastebasket in front of General Session Room

2 8' draped tables for information

General Session

9:00 am – 3:30 pm

Room: Capitol Room

Set - for XXX theater style, pitchers of water on side tables, pencils or pens, Head table on riser for 6-person panel, table top podium in center with microphone, two table microphones on panel table.

Food/Beverage - 8:00am- 9:00AM: **\$XX.XX pp for XXX** Coffee, tea, decaf Continental breakfast-

AV – Wired lavalier microphone

Awards Lunch

Room: Congressional -A Room

Noon - 1:30 PM

Set: rounds for XXX people; **Table Rounds of XX**; Reserved head table(s) for XX (executive board, executive director, VIP, and Key Note Speaker, etc.)

Food/Beverage - Serve at noon; program to follow dessert Food: **\$XX.XX pp for XXX (Insert Menu)** (Roast Vegetable soup; Farmers Market Salad; New York Sirloin; New York Cheesecake).

AV - Floor standing Podium with microphone

General Session

Reconvenes 1:45PM - 3:30PM

Room: Capitol Room

Set - for XXX theater style, pitchers of water on side tables, pencils or pens, Head table on riser for X-person panel, table top podium in center with microphone (or floor standing podium), two table microphones on panel table.

Food Beverage – (Insert Items) (Lemonade; Iced tea)

AV - Floor standing microphone in audience, screen; table and extension cord (presenter is doing PowerPoint presentation but bringing own laptop and projector)

Workshops

3:30pm – 4:30pm

Workshop 1: (Insert Speaker Name and Location)

Workshop 2: (Insert Speaker Name and Location)

Workshop 3: (Insert Speaker Name and Location)

Regional Meetings

4:30PM - 5:30PM

Set: same as workshops

Rooms: (Insert Location)

Reception

5pm – 7pm

Room: Congressional A

Set X cocktail rounds with X chairs per table, scattered throughout room, votive candles on tables

Menu – Cash bar, **for XXX (Insert Menu)** (Seasoned Chicken fingers, Herb

Cheese stuffed mushroom caps; international cheese board; Tropical Fruit

Display; Crudités; Antipasto Display)

(Insert Date)

Registration and Exhibits

7:30 am – Noon

1 8' draped table, 2 chairs, wastebasket in front of General Session Room

2 8' draped tables for information

General Session

9:00 am – 12:00 pm

Room: Capitol Room

Set - for XXX theater style, pitchers of water on side tables, pencils or pens, Head table on riser for 6-person panel, tabletop podium in center with microphone, two table microphones on panel table.

Food/Beverage - Set - Food/Beverage - 8:00am- 9:00AM: \$XX.XX pp for XXX (Insert Menu Items) Coffee, tea, decaf Continental breakfast for XXX theater style, pitchers of water on side tables, pencils or pens, Head table on riser for 6-person panel, table top podium in center with microphones, two table microphones on panel table.

AV – Wired lavalier microphone, Floor standing microphone

END

Appendix VII

Audio Recording Permission Form

We would like to record each seminar.

A cassette of your seminar will be available to attendees or other interested parties at a nominal charge. They may also be used by the editorial staff for follow up editorial coverage and articles that appear in publications produced by NARC&DC.

A complimentary copy of your session will be provided at your request.

In order to record your session, we would appreciate receiving from you a signed copy of this release before the conference.

Return this form to:

I authorize and assign permission for NARC&DC to tape record my presentation(s) as delivered at:

It is understood that audio cassette reproductions of my presentation will be sold and distributed to conference registrants, as well as others who may wish to obtain information for both audio and print media.

I affirm that none of the material in my presentation, to my knowledge, infringes on the copyright or right of privacy of other, and that material, which references the work of others will be properly credited to that source.

Further, I will not misrepresent, libel or slander any person, facility, service or product in the course of my presentation. If breached, I will indemnify and hold harmless NARC&DC, its employees and its representatives.

Signature: _____

Printed Name: _____

Date: _____

Appendix VIII

XYZ RC&D COUNCIL 20XX Regional Conference

(Insert Date)
(Insert Place)

Speaker Agreement and Information Form

Please mark changes directly on this form, sign and mail or fax back to XYZ RC&D COUNCIL at (555) 555-5555 no later than (Inset Date).

This agreement for professional speaking services is made and entered into this X day of (Insert Month), 20XX by and between (Insert Speaker Name), in this agreement "Speaker" and the, XYZ RC&D COUNCIL, in this agreement, "XYZ RC&D COUNCIL."

Parties

Speaker Name
(as it will appear in the program)

Institution / Organization
Address

Social Security Number

XYZ RC&D COUNCIL Contact
Function and Dates

XYZ RC&D COUNCIL 20XX Regional
Conference (Insert Date)

Speaker is scheduled for the following
Presentation(s):

(Insert Description)

(Insert Dates and Time of Presentation)

Costs

Hotel Accommodations

Speakers are responsible for making their own
hotel reservations directly with the (Insert
Hotel Name).

Speaker will receive an honorarium of \$
\$XXX.XX. XYZ RC&D COUNCIL will

provide payment at the time of presentation.

Audio Reproduction of Presentation

XYZ RC&D COUNCIL and its designated agent is expressly authorized and granted the right to audiotape Speaker's presentation for purposes of reproduction and sale.

Video Reproduction of Presentation

XYZ RC&D COUNCIL and its designated agent is expressly authorized and granted the right to videotape Speaker's presentation for purposes of reproduction and sale.

Transcription and Publication of Presentation

XYZ RC&D COUNCIL is expressly authorized and granted the right to transcribe and publish Speaker's presentation in the XYZ RC&D COUNCIL Newsletter; or any other XYZ RC&D COUNCIL publication. Minor editing changes may be made; and the Speaker reserves the right of final approval of the manuscript before publication by XYZ RC&D COUNCIL. Any such article will carry Speaker's name as author.

Speaker Information

Curriculum Vitae (CV)

Speaker will provide XYZ RC&D COUNCIL with a current CV, biography or resume no later than (Insert Date).

Session Description

Speaker will provide XYZ RC&D COUNCIL with a 3-4-sentence description for the Presentation (s) no later than (Insert Date).

Speaker Introduction Form

Speaker will complete and return the enclosed Speaker Introduction Form no later than (Insert Date).

Timely Performance

Timely performance of the terms, conditions, and duties in this agreement is the essence of the agreement. No failure or repeated failure on the part of either party to enforce or to require strict and literal compliance with one or more of the agreements in this agreement shall be deemed a waiver of it.

Commercialism/Marketing

XYZ RC&D COUNCIL sessions are noncommercial forums. Individuals should refrain from the use of brand names and specific product endorsement whenever possible. Under no circumstances should the

session podium be used as a place for direct promotion of a speaker's product, service, or monetary self-interest.

Presenters from any session podium must refrain from overt statements or pointed humor, which disparages the rightful dignity and social equity of any individual or group.

Failure to Perform

In the event of failure or refusal of Speaker to perform Speaker's obligations under this Agreement, all costs, charges and expenses XYZ RC&D COUNCIL incurs shall be part of the damages to be paid by Speaker to XYZ RC&D COUNCIL as a result of such failure or refusal to perform, including but not limited to attorney's fees and expenses.

Notices

All notices shall be made in writing sent by regular mail, certified mail or facsimile transmission by one party to the other at the addresses provided in Paragraph 1 of this agreement.

Modification of Agreement

Any change to this agreement must be made in writing and agreed to by both parties.

Signatures

Speaker:

XYZ RC&D COUNCIL:

(Insert Speaker Name)

(Insert Authorized Officials Name),
XYZ RC&D COUNCIL

Date: _____

Date: _____

Appendix IX

XYZ RC&D COUNCIL
20XX Regional Conference

SPEAKER INTRODUCTION AND AUDIO VISUAL FORM

Please complete the information below to help XYZ RC&D COUNCIL assure that we introduce you in the manner you'd like. If you have a prepared brief introduction you would like us to use, please attach it.

Name: _____

Title: _____

Organization: _____

City, State: _____

I would like to be introduced as: _____

(i.e. Dr. Sam Smith, Sam Smith, MD, CEO)

Please list key activities or items you would like included in your introduction, or, feel free to script the introduction if you wish:

1. _____

2. _____

3. _____

4. _____

Please indicate the equipment you require to make your presentation:

- Lectern
- Lectern microphone
- Lavalier microphone
- Overhead projector/screen
- 35mm slide projector/screen
- Flipchart/pad/pens
- LCD projector

**RETURN NO LATER THAN (insert Date) TO:
XYZ RC&D COUNCIL, Attn: (Insert Contact information)**

Appendix X

SAMPLE RFP TO SECURE HOTEL AND MEETING SITE

XYZ RC&D COUNCIL Leadership Forum Specifications

Sponsor: XYZ RC&D COUNCIL

Contact: (Insert Contact Information)

Preferred Dates: (Insert Date)

Alternative Dates (Insert Date)

History: (Insert History of Meeting; Dates and Locations)

City Requirements: Include the following in the proposal:

- Services on property
- Policies and miscellaneous charges
- # of miles between airport and facility
- Transportation options and average cost

Room Block: Sunday: XX rooms
Monday: XX rooms
Tuesday: XX rooms
Wednesday: XX rooms
Thursday: XX rooms

Exhibits: **XX Display tables**
(Inset Date and Times needed)

MEETING SPACE OUTLINE (Sample)

MONDAY

8am – 5pm	Registration	2 registration tables
9am – 11:30pm	General Session Room	Theater for 200
12pm – 1:30pm	Awards Banquet	Rounds for 200pp
2pm – 5pm (5)	Legislative Sessions	Theater for 50

TUESDAY

8am – 5pm	Registration	2 registration tables
9am – 11:pm	Leadership Sessions	Theater for 200
11am-11: 30am	General Session	Theater for 200
1pm --4pm	Legislative Visit Updates	Rounds for 50
4pm – 7pm	Reception	Cocktail Setup with Rounds for
100		

WEDNESDAY

8am – 10am Registration
9am – 11am General Session
1pm – 5pm (5) Concurrent Sessions

2 registration tables
Theater for 100
Theater for 25

Appendix XI

Sample Speaker Invite letters

(Insert Date)

Secretary Ann Veneman
US Department of Agriculture
1400 Independence Ave., SW - Rm. 200-A
Jamie Whitten Building
Washington, D.C. 20250

Dear Ms. Veneman:

The XYZ RC&D COUNCIL will be holding its annual Regional Meeting in X State on (Insert Date). It would be a great honor to have you attend our Regional Meeting and speak at our opening general session on the morning of (Insert Date).

As you are aware, RC&D Councils help to plan and carry out activities that increase conservation of natural resources, support economic development, and enhance the environment and standard of living in local communities. Our Regional Meeting draws people from around the country. This year, attendance is expected to be over 200 people, which will include local civic leaders and elected officials, from around the nation.

The Meeting is an extraordinary event designed to bring together individuals from various facets of American life and foster the sharing of ideas to better life in America. In addition, the conference will be a medium in which Federal, State, and Local actors may work together to resolve local community and natural resource issues. Our focus for the 20XX Regional Meeting will be on: building partnerships at the local level to improve quality of life; outreach to underserved communities; and finding the resources necessary to meet the needs in our nation's communities.

We look forward to your participation. I sincerely hope that your schedule will allow you to personally attend and speak at our Regional Meeting. Should you need any additional information, please do not hesitate to contact (Insert Alternate Contact Name) or myself at (xxx) xxx-xxxx.

Sincerely,

(Insert Name) (Insert Title)
XYZ RC&D COUNCIL

Appendix XII

VOLUNTEER FORM

XYZ RC&D COUNCIL 20XX Regional Meeting

Lend a Helping Hand!

Please print and fax this form to: (Insert Name) (XXX) XXX-XXXX or send the following information via email to: (Insert E-Mail Address)

FIRST _____ M.I. _____ LAST _____

UNIVERSITY/ORGANIZATION _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____ COUNTRY _____

DAYTIME PHONE () _____ FAX () _____

E-MAIL ADDRESS _____

Please tell us which days you would like to volunteer:

(Insert Date)

(Insert Date)

(Insert Date)

(Insert Date)

Please tell us which area(s) you would like to assist with:

Silent Auction

Assist in receiving and cataloging items; security of auction room; assist with transportation of items to and from the auction site; assist with receiving funds, writing receipts, and distributing sold items.

Social Events

Line up buses on Tuesday evening; assist with loading buses on Tuesday evening; Provide information to participants; assist with seating; help coordinate events; assist with set-up for events.

Internal Control

Provide information to attendees; answer phones; take messages; type; answer RC&D program questions and logistics questions.

Family Activities

Take photographs during guest and family tours.

Youth Activities

Work in information booth.

Registration

Assist with registration booth; distribute registration materials to pre-registered attendees.

Transportation

Assist with transportation and arrangements for speakers and VIPs.

Communications

Assist with daily newsletter; write articles for events; take photographs.

Program/Sessions

Monitor doors and introduce speakers.

Schedule Confirmation Error! Bookmark not defined.

You will receive a confirmation via e-mail letting you know the dates and times you are scheduled. Please make sure your e-mail address is included on this form and is printed legibly.

Return This Form NO LATER THAN (Insert Date) to:

(Insert Name) (XXX) XXX-XXXX or send the following information via email to: (Insert E-Mail Address)