

WESTERN BUSINESS EDUCATION  
ASSOCIATION

CONFERENCE PLANNING  
GUIDE  
(Revised 2020)

# PLANNING A SUCCESSFUL CONFERENCE

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**WBEA POLICIES AND PROCEDURES MANUAL**  
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 (Revised 2017)  
 View the complete manual on line at **wbea.info**

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## PLANNING A SUCCESSFUL CONFERENCE

(Revised 2015)

This WBEA Conference Planning Guide provides a general description of information you will need to plan a WBEA or WBEA/State, Territory or Province (S/T/P) joint conference. The WBEA Annual Conference Advisory Committee, which meets on the Friday morning of the annual WBEA Conference, is also a resource as you plan a successful Western Region conference.

### CONFERENCE PURPOSES

The WBEA Conference serves the following purposes:

1. It provides a service to members by providing professional growth opportunities, peer-to-peer networking opportunities, and examination of hardware, software, and curriculum materials.
2. It is the annual meeting of WBEA membership as required by the WBEA Articles of Incorporation.
3. It generates operating funds for WBEA and the host S/T/P. WBEA relies on conference proceeds for its operating funds. To that end, the conference must earn excess revenue over conference expenses. The excess revenue is split between WBEA and the host S/T/P based on the WBEA Policies and Procedures (P & Ps). (Section A8042, WBEA P & Ps)
4. It attracts new members to WBEA and to the host S/T/P associations. The dues collected from these new members go directly to the associations. Dues collected are not part of the conference revenues. (However, they should be reflected as Dues Collected in the Income and Dues Distributed in Expenses on the Conference Financial reports and budgets.)
5. It gives everyone in the Western Region an opportunity to network with colleagues.

### WBEA ANNUAL CONFERENCE ADVISORY COMMITTEE

The purpose of the WBEA Annual Conference Advisory Committee is to review proposals, budgets, and plans for conferences and provide answers and input to aid in hosting a successful WBEA Conferences. After reviewing the proposals, the committee submits its recommendations to the Board. This Conference Planning Guide is available to assist conference organizers. The Committee meets with conference organizers each of the three years prior to the conference to review conference planning progress. A final report with recommendations is also presented by the conference chair the year following the conference. (Section 6110, WBEA P & Ps)

### GENERAL PROCEDURES

1. An application to host the conference should be presented to the WBEA Annual Conference Advisory Committee and the WBEA Executive Board four years before the conference. (Form A8030) The conference dates should be the Thursday through Monday of Presidents' weekend in February, except in Arizona. (Section 8010 of WBEA P & Ps)
2. The WBEA President has the ultimate responsibility for the conference, serves as official conference host, and is the liaison to the WBEA Executive Committee and Board. (The Conference Chair may also be asked to present reports to WBEA.) (Section 8050, WBEA P & Ps)
3. The nominee for WBEA President for the year of the conference and the Conference Chair should be selected no later than 2½ years prior to the conference. This timeline will allow both

to work together when negotiating contracts, appointing the conference committee, and developing the conference format and program.

4. Read and follow WBEA Policies and Procedures Section 8000 Conference, 8010 Dates, 8020 Rotation, 8030 Bids to Host, 8040 Policies, and 8050 Responsibilities. Also read Appendixes A8000 Sample WBEA Conference Timeline, A8041 WBEA Conference Registration Guidelines, and A8042 Conference Proceeds Split.
5. Annual progress reports will be presented to the WBEA Annual Conference Advisory Committee by the Conference Chair. A final report should also be submitted the year following the conference to the Annual Conference Advisory Committee and the WBEA Executive Board.
6. The responsibility of planning and making the detailed arrangements for the conference should be assigned to the conference chair and appointed committee members. The Conference Chair and WBEA President must know about all agreements and arrangements so that any conflicts or duplications of committees can be avoided.
7. Control expenses and be prudent with the funds you spend to generate revenue.
8. Since this conference is also the WBEA annual meeting, WBEA requirements and timelines must be included while also incorporating the S/T/P needs.
9. To encourage conference attendance, the S/T/P should not hold a separate state conference the same year as it hosts the WBEA conference.

#### KEYS TO SUCCESS

1. Start early.
  - a. Submit an application to host WBEA to the Annual Conference Advisory Committee four years before the conference is to be held. The Annual Conference Advisory Committee can help you answer questions, brainstorm ideas, and make suggestions representing WBEA and its membership requirements before you finalize a contract. (See this Appendix or A8030, WBEA P & Ps)
  - b. Decide on a conference theme. This will provide ideas for program and workshop topics, publicity themes, and continuity as the committee and planning evolves.
2. Conference committee organization.
  - a. Establish your committees; recruit experienced, reliable, creative, and enthusiastic chairs and members. Select members with WBEA conference experience, members with your S/T/P conference experience, and others who are eager to work on the conference. Doing so provides for more varied input and new ideas during your conference planning. (See the sample committee structure provided later in this manual.)
  - b. Once most positions have been filled, meet with committee chairs. This meeting does not necessarily need to be at the conference site and could be via teleconferencing, if financially and logistically necessary. This meeting should
    - i. Give everyone an opportunity to have a face and name to their fellow committee members.
    - ii. Clarify the procedures to be followed as each committee proceeds with its duties. Procedures should include who can make agreements/contracts, policies for reimbursements (forms to use, what will be reimbursed, timeline for submitting reimbursement requests), discussion of a tentative program, schedule for future meetings, and due dates committee reports should be sent to the Conference Chair.

- c. Committee members should communicate with each other often and the Conference Chair should receive regular reports from each committee.
3. Prepare a budget.
    - a. Prepare a tentative budget as soon as you know you will be hosting the conference.
    - b. Update and finalize the budget once the hotel contract has been signed.
    - c. Each committee should prepare a budget for their committee and submit it to the Conference Chair who then should develop and oversee the creation of the entire conference budget. The conference budget should be shared and followed by all committee members.
    - d. Present the budget each year in your reports to the Annual Conference Advisory Committee.
    - e. Communicate guidelines for expenditures and reimbursements with the conference committee.
    - f. Prepare a final Profit and Loss Financial Statement along with the final budget figures of the Conference and submit these with your final report to the WBEA Executive Committee and the Annual Conference Advisory Committee.
  4. Keep good records.
    - a. Get everything in writing. Take good notes, keep good records, and keep an audit trail of correspondence, emails, and meetings. (Keep electronic copies of emails with the hotel and others. This gives a reference to items discussed, offered, and agreed upon if companies change staff and as the committee proceeds with planning.)
    - b. Follow up each meeting (with the hotel staff, conference committee, and others) with an email or letter summarizing your discussions, agreements, or minutes. Keep copies. (All committees should do this.)
  5. Expect changes.
    - a. Hotel staffs change, rates change, hotel ownership changes, companies either start up or cease to exist, etc. This is when keeping written records may be helpful.
  6. Design initial publicity, which may be a brief promotional flyer or card, to distribute at the WBEA conference two years before your conference. It should announce the location, dates, theme, web address, and email contact.
    - a. Share publicity with other organizations in order to promote your conference.
    - b. Give the initial publicity to the exhibitors/vendors so that they can schedule your conference in their future plans.
    - c. The publicity provides contact information for possible speakers, workshop presenters, exhibitors or sponsors, or those who just have questions.
    - d. At the conference immediately prior to your conference, be prepared to promote your conference. This can include a skit, handouts, video/slide presentation, or whatever means you choose. A table is usually available in the exhibit area and an oral invitation to the conference is given at one of the General Sessions.
  7. Limit responsibility and ability to sign contracts and make agreements.
    - a. Require that ALL negotiations, contracts, agreements, and requests involving the conference come through one or two people—the President or the Conference Chair are suggested. They should always consult with others before signing an agreement or making major decisions. There MUST be only one person who can make commitments to the conference site. (The S/T/P is responsible for any agreements made so be sure to follow your S/T/P guidelines when contracts are signed.)
  8. Outline the basic conference schedule. (See Appendix for Schedule Planning Sheet)
    - a. General Sessions (how many, when, program/agenda, speaker, meal, costs)

- b. Breakout Sessions (how many, what topics)
  - c. Computer Workshops (how many, where, topics, presenters, costs)
  - d. Meal Functions (how many, when, program, costs). Include their costs as part of your Registration fees. Do not forget to include the taxes and gratuities in the total cost of meals and refreshments.
  - e. Refreshment Breaks (how many, what time, costs)
  - f. Executive Committee and Board meetings
  - g. Exhibits (allow ample time between breakout sessions for attendees to visit the exhibits)
9. Visit the conference site with committee chairs at least once prior to the conference.
  10. Request the conference operating funds advance (\$1000) from the WBEA Treasurer the July 1 prior to the conference and deposit the funds in the conference checking account.
  11. Settle financial records as soon as possible.
    - a. Plan to pay all bills at the end of the conference or within 30 days.
    - b. Transfer all association dues which have not already been transferred. (Dues should be sent to the appropriate associations on a regular basis while registrations are being received.)
    - c. Transfer funds raised for WBEA Professional Development (silent auction, pineapple pull, \$1.00 for each registrant) and the \$1000 advance to the WBEA Treasurer within 30 days after the conference. These funds are not included in the conference profits.
  12. Send thank you notes to
    - a. all the vendors who provided equipment, software, speakers, or sponsorships during the conference
    - b. all speakers and their supervisors
    - c. all exhibitors
    - d. all companies or persons who sponsored speakers or activities
    - e. your committee members and chairs.
  13. Use the Chair of the WBEA Annual Conference Advisory Committee as a resource person whenever necessary. Do not hesitate to ask questions about WBEA procedures/customs when planning the program. The conference should cover WBEA needs as well as your S/T/P's.

## NEGOTIATING CONTRACTS

1. Remember everything is negotiable.
  - a. Negotiate sleeping and meeting room rates and numbers, food and beverage prices, audio visual costs, parking fees, resort fees, gratuities, due dates, deadlines, etc.
  - b. Room rates should be confirmed in initial negotiations. Prices should be confirmed two years before the conference so that you can begin distributing registration details. Also, if there is a resort or other hotel fee, try to get it waived.
  - c. Do not take NO for an answer when you negotiate.
2. Negotiate for these free/complimentary rooms and items.
  - a. Executive Committee and Board meeting rooms.
  - b. Complimentary conference committee meeting space and sleeping rooms for when the Conference Committee meets at the facility.
  - c. Registration space in a main traffic flow area during the conference.
  - d. Hospitality room to greet speakers and guests during the conference.
  - e. Secure storage room to house A/V equipment and other conference materials.
  - f. Exhibit room/space that can be locked or otherwise secured at night. Ask about exhibit area security.

- g. President's Suite and as many additional complimentary suites and rooms as possible.
- h. Breakout/workshop session rooms—A common hotel practice is to base the number of free breakout rooms on the number of meals you sell and/or number of room nights.

Complimentary rooms are usually based on the number of guest rooms occupied. A typical guest to comp room ratio is one complimentary room to 40-50 paid guest room nights during the conference INCLUDING exhibitors and speakers rooms. Make sure you know the release date for reservations and advertise this widely.

3. Include at least one meal in the registration fee to help meet food and beverage requirements.
4. Try to secure door prize(s)—free hotel room, etc. These items may be used for conference promotion, silent auction, or door prizes.
5. Work with the Food/Beverage/Catering Manager for meal selections and costs.
  - a. Some hotels will create menus based on what you want to pay per meal.
  - b. Some hotels will also allow using the Room Service menu for very small meetings which may not be large enough to meet the catering minimum.
6. Examine the conference site contract carefully before signing.
  - a. Have at least three other people read it too. (Before signing, bring tentative contracts to the WBEA Annual Conference Advisory Committee for their review and suggestions.)
  - b. Make sure it matches your oral agreements and previous correspondence.
  - c. The contract should cover what is and is not covered as well as costs and deadlines.
7. Verify what you can bring in during meetings and for the conference to avoid paying hotel rates, such as audio visual equipment (microphones, projectors, screens, extension cords) or meeting refreshments.
8. Determine the costs for items such as
  - a. beverage service, including water service
  - b. additional electrical outlets/boxes (especially important with computer rooms and exhibit areas)
  - c. podiums/lecterns/tables/chairs
  - d. copying costs
  - e. signs

### Points to Include in Contract

Check these points to make sure the contract covers every important aspect of your conference. The contract should include the following details for sleeping rooms:

1. Check in and out dates plus any days of early arrival or stay over at conference rates. Include the day of week as well as the date.
2. Number in the block of rooms and mix of occupancy and types of rooms. Also mention rates and applicable taxes and possible resort fees (try to get these waived). Will the rooms be singles, doubles, or triples? Double/doubles or twin/doubles?
3. Cutoff date for pickup and release of rooms. Note sliding scale of room block as it relates to date from performance.
4. Any space committed, plus other hotel amenities, to your group free of charge and how it relates to your use of guest rooms and meal functions.
5. Schedule of meeting room charges (if any) for all space you will use. If you are using meeting space free of charge based on guest rooms and/or meal functions, mention how an increase or decrease in room use or meal function will affect charges.



6. Schedule of meeting-related charges, such as audio-visual, easels, pads, pencils, etc. At the end of this list add: "No Additional Charges."
7. Food costs by individual menu. Also note how entree or surcharge costs will change if the number of attendees increases or decreases.
8. Payment clause. What must be paid up front, what portion of bill is payable on departure and what time schedule is set for payment for disputed charges.
9. Cancellation clause. Check the hotel's cancellation policy. **This should be listed in the contract.**
10. A statement identifying authorized agents for both the property and client.

#### MONITOR YOUR ROOM PICK-UP NIGHTS

1. Know who to contact at the hotel to find out the names and number of nights registered in the conference block. (The hotel may give you access to do this electronically.)
2. Before the registration cut-off date, ask the hotel for a list of names and number of nights that have been reserved so that you can compare them with your conference registrations, exhibitors, and speakers. This gives you an opportunity to be sure that all program participants, committee members, and VIPs have made reservations and that their rooms are included in your room block. Contact those who are not on the hotel list to verify they have made their hotel reservations.
3. Provide the hotel with the missing names to see if they are booked outside of the conference room block. Be sure if anyone is registered outside of the room block that the conference gets credit for their room nights.
4. Many hotels will provide a link to their reservation center so that this link can be put on the S/T/P and WBEA websites with the conference information so that hotel reservations can be made directly by conference attendees.
5. Give the hotel a list of VIPs attending the conference so that their rooms can be assigned accordingly.

#### CONFERENCE PLANNING

1. Prepare a budget early. Update as necessary.
2. Determine what you will charge for any special hands-on sessions (i.e., computer workshops). If there are costs for equipment, internet connections, transportation, facilities, etc., they should be covered by the registration fee.
3. Special events (i.e., cruises, tours, hands-on workshops, pre- and post-conference events) should be self-supporting if they are not completely financially sponsored.
4. Design and produce your conference registration form **at least 1 year prior to the conference.**
5. Plan your conference promotion/publicity early. Coordinate with S/T/P newsletter deadlines to make good use of publicity in the S/T/Ps newsletters.
6. Put conference information and links on WBEA and S/T/P websites and continue to update these on a regular basis.

#### Site Selection Guidelines

1. The final site selection should be determined 2 ½ to 3 years prior to conference. The following is a list of items to be considered and negotiated before signing a final contract. (See Appendix for **Checklist for Meeting Room Inspection.**)

2. Check the facility for the following:
  - a. Function space related to your needs (size, staging, head table, A/V, etc.).
  - b. Adequate meeting room space—number of rooms, size, location. You need space for breakouts, computer workshops, exhibits, general sessions and meal functions, storage, registration.
  - c. Layout and location of meeting space to be used during the conference. Breakouts and other meeting space should be near to each other. This will lead to better attendance in workshops, opportunities for networking during breaks, visiting exhibits.
  - d. Sleeping room needs and price.
  - e. Transportation getting to and from the airport and highways—costs and ease. Parking availability and fees.
  - f. Points of interest and local businesses available for visits.
3. Is there S/T/P membership in the conference area who are willing to help with the conference?
4. Compare your budget with the property's prices.
  - a. What will you need to charge as Registration Fees?
  - b. What are food and beverage costs?
  - c. What are the taxes and gratuities amounts?
  - d. What will it cost to attend the conference? (room, registration, transportation, etc.)
5. Find out now about any conflicts or overlaps in dates both with the hotel and the local area.
  - a. Other conferences either in the hotel or in the area can infringe on services and facilities you wish to use during the conference.
  - b. Is the facility planning any future planned remodeling before or during the conference?
  - c. Determine what complimentary rooms are available and how many. Are there concierge privileges and are they indicated in the contract.
6. Method of making hotel reservations for conference attendees. Does the hotel have a form and can the reservations be made electronically? Hotels may provide a link and/or code that can be used in publicity and websites. What provisions will be made if attendees can get a cheaper rate or block outside of the room block?

### Financial Planning

Conference funds should be kept separate from other accounts. There should be a separate conference checking account. Follow proper accounting procedures.

### Fiscal Procedures

1. Committee chairs should know the budget and follow it as they carry out their committee's plans. Amounts spent and committed must be approved by the conference chair.
2. A reimbursement request voucher with receipts attached should be submitted to the Finance Chair as soon as possible after the expense is incurred. Reimbursements should be requested within a reasonable amount of time but no more than 30 days.
3. Confirm costs in writing prior to ordering any supplies or equipment.
4. Income should be deposited regularly and in a timely manner.
5. Dues must be transmitted to the appropriate Associations as they are received—NOT all after the conference. (Association membership benefits begin when the Association receives the dues not when the member pays them.)
6. Review all hotel bills before leaving the conference site at the end of the conference.

7. Pay bills in a timely manner and try to have all bills paid within 30 days following the conference.

### Budgeting

1. Prepare a budget to reflect all expected income and expenses. Update the budget as specific figures become available. A final budget should be developed no less than two years before the conference.
2. A final budget may be adjusted if food and rental costs change.
3. Review past budgets for WBEA conferences as well as for your S/T/P conferences.
4. Follow WBEA Policies and Procedures about charges to include in registration fees.
5. Determine the tentative costs for all things pertaining to your conference: rentals, food, beverages, gratuities, registration costs, publicity, administration, and program.
6. Reasonably estimate number of attendees to expect. (Recent years have been in the neighborhood 100 paid registrants.)
7. Determine what you will charge for computer workshops. All expenses including equipment, internet connections, presenters, and materials must be covered by a registration fee.
8. Special events (i.e., cruises, tours, workshops, receptions, pre- and post-conference events) should be self-supporting or covered by a registration fee.
9. Include gratuities and taxes in the costs of meals, beverages, and A/V equipment when you budget and determine registration fees.
10. Budgets should be included in your reports to the Annual Conference Advisory Committee.

### Controlling Costs

The following list suggests some ways to reduce costs:

1. Take advantage of local talent. Employees of your organization are potential resource people. Using them can reduce or eliminate fees and travel expenses.
2. Free access to equipment, services, or personnel may be available from the city's Conference Bureau or from volunteers within your organization.
3. Bargain with the host facility.
4. Exhibit fees can be the difference between financial success and failure. Encourage exhibitors to participate in your event.
5. Allied businesses, exhibitors, and participants' organizations may furnish promotional items, registration gifts, or door prizes.

### Division of Revenues over Expenses

1. Excess conference revenues are divided between WBEA and the S/T/P based on WBEA Policies and Procedures. (Section A8042, P & Ps)
2. Follow the guidelines for revenues which should be sent directly to WBEA before determining the final revenue balance to be divided. (Section 8040, P & Ps). Revenue which is not shared but should be sent to WBEA within one month of the conference includes:
  - a. \$1 per registrant for Professional Development fund
  - b. Silent auction proceeds
  - c. Pineapple pull proceeds

### Program Planning

1. Distribute a "Call for Presentations" two years before the conference.

- a. Indicate conference theme, dates, location.
- b. Topics and subjects you are seeking.
- c. Types of presentations needed. (breakout , computer workshop, general session)
- d. Try to avoid offering A/V equipment other than a screen.
- e. Contact person name, email, and other contact information. Include web addresses.
2. Distribute an “Invitation to Exhibit” to all possible exhibitors/vendors.
  - a. Have someone personally invite each of the exhibitors at the prior one or two WBEA conferences and at S/T/P conferences.
  - b. Contact companies in your area who might be interested.
  - c. Indicate times of exhibits, cost of space, what the space includes, times for setting up and tearing down booth space.
  - d. Provide a contact person’s name, email, and association website.
  - e. Provide hotel reservation methods and rates.
  - f. At the conference, provide at least one conference program for each vendor.
3. Setting the conference program
  - a. Establish firm dates and times for each session, workshop, and exhibits.
    - i. Allow plenty of time between events that are scheduled in the same room.
    - ii. Allow plenty of time for attendees to visit exhibits.
    - iii. Allow time for refreshment and personal breaks.
  - b. Establish the size of the room—number of people to be seated and seating setup. (classroom, theater, etc.)
  - c. Check out the location of light switches and electrical outlets. If hotel music is piped in from an outside source, can you control the sound in the room? How do you control the heating and air conditioning?
  - d. For General Sessions, are risers are required? Check head table requirements. Check capability of rooms for projection and sound systems. Is a screen provided? Where?
  - e. Check the public address system. Can you tie into it with your media player/computer?
  - f. Ask if writing tablets, candies, water pitchers or water containers and glasses are available in all breakout rooms.

### Registration Procedures

1. Prepare Registration form 1 to 1 ½ years before the conference.
2. Enable registration to be done electronically from the WBEA website.
3. Follow the WBEA Conference Registration Guidelines on page 18 of this manual.
4. Review Appendix Section 8041 Conference Registration Guidelines in the WBEA Policies and Procedures Manual for updates.
5. Limit complimentary registrations. Complimentary registrations do not need to include all of the meals. (For example you could offer a complimentary meal at the session where they may speak but not the other meal functions.)

### WBEA President Responsibilities

1. Begin as soon as you know that you will be WBEA President-elect.
2. Read Section 8050 of the WBEA Policies and Procedures Manual on Responsibilities.
3. Serve as General Director of the annual WBEA Conference and work closely with the Conference Chair.

4. Serve as Liaison between the Conference Committee and WBEA Executive Committee, WBEA Executive Board, and the WBEA Annual Conference Advisory Committee.
5. Give a final conference report at the summer WBEA Executive Committee meeting and the next Board meeting which includes final attendance figures, summary of conference evaluations, financial statements, and recommendations.
6. Work with Conference Chair and committee to finalize the conference program. (The hotel contract may have already been signed but if not, review all points carefully and work with the Conference Chair to clarify and get in writing all offers/agreements from the hotel. (See the tentative timelines recommended later in this manual.) (Section A8000, P & Ps)
7. Promote the conference whenever possible.

SAMPLE WBEA CONFERENCE TIMELINE (Appendix A8000 of the WBEA Policies & Procedures Manual)

48 Months	Submit application to host the WBEA Conference to the Annual Conference Advisory Committee then to the WBEA Executive Board.
24-36 Months	Select Conference Chair and conference hotel.
18-24 Months	Conference Chair begins forming committees—selecting personnel—especially important to name Site Coordinator who is located near the conference site.
18-14 months	Meet with chairs of various committees to review their area of responsibility. See that each has a copy of responsibilities. Arrange for a copy of all communications sent out by the various committee chairs to be sent to Conference Chair.
16 Months	Tentative plan and budget from all committees should be submitted to conference chair.
15 Months	Conference Chair and Finance and Budget Committee should meet and finalize the conference budget. Funds for the WBEA Scholarship shall be allocated before conference proceeds are distributed to the state and region.
12-13 Months	Exhibit Chair formulates letter and forms for first mailing to exhibitors.
9-10 Months	Conference Chair, WBEA President, and other committee chairs meet at the conference site, if possible, to make tentative plans for the conference.
8-9 Months	Conference Chair should: 1. Check with committee chairs to determine progress being made by committee; 2. Remind committee chairs that each is to make a report to the Conference Chair as soon as possible. In the report, will be given for improving the work of the committee next year; 3. Make special effort to determine that Exhibit, Program, and Publicity Chairs are making satisfactory progress with their respective responsibilities; 4. Check on menus for various banquets and luncheons; contract or determine the date costs can be finalized; 5. Check that second mailing to exhibitors ready to be sent.
6 Months	Conference Chair should: 1. Check on progress being made by all committees - particularly Exhibits, Program, and Publicity committees; 2. Make sure special sponsored activities and functions are taking shape.
5 Months	Conference Chair should: 1. Receive dummy of program from committees; 2. Get any additional special instructions from WBEA President regarding such matters as whether or not to provide special activities for wives/husbands during conference, the handling of complimentary tickets during conference, etc.; 3. Check with WBEA President about reservations for visiting national officers and regional officers at the conference; 4. Make plans on definite entertainment for various banquets and luncheons.

- 4 Months Conference Chair should: 1. Check to see that all committees are functioning; 2. Draft letter announcing the conference. This may be delegated to the Publicity Chair to write. This letter is to be printed and mailed by the Publicity Committee to WBEA members and all business teachers in the state where the conference is being held. Mailing should provide information about hotel accommodations, meal costs, airline facilities to conference city and should carry a tentative conference program. Provisions should be made for room reservations and pre-registration to be sent in.
- 3 Months Conference Chair should:
1. Check to see that Exhibit Chair has everything under control.
  2. Conference Chair, Program Chair and WBEA President will meet to go over the conference.
- 2 Months Conference Chair should:
1. Get copy of printed program from Program Chair. Check for accuracy of room assignments for meetings, special equipment needed, etc.
  2. Go over final plans with the Site Coordinator:
    - a. Check with A/V person for equipment needed and special seating arrangements.
    - b. Arrangements for special coffees or receptions.
    - c. Make arrangements for special equipment needed at banquets and luncheons.
- 1 Month Secure names of those attending meetings before the formal start of the conference from the President, President-elect, and Past President so that their packets can be pulled and given to them early (Executive Board, etc.).
- 2 Weeks Before Bring all committee chairs together and review the responsibilities of each committee throughout the conference.
- 2 Weeks After Send thank you notes to committee members, committee chairs, exhibitors, speakers, etc.  
Photographer provides multiple copies of pictures to conference chair. Pictures should be sent to the President, President-elect, and WBEA Newsletter Editor within one (1) month of the conference.
- 1-2 Months After
1. All committee chairs should submit final reports to Conference Chair.
  2. Conference Chair will submit final report to WBEA President.
  3. Pass Conference Planning Guide to new WBEA President-elect.

## COMMITTEE STRUCTURE AND DUTIES

The following is a possible list of committee positions and duties which need to be completed. A typical number of committee chairs is probably eight (8) to 10. Duties of each committee will be determined by the S/T/P and the persons selected for each committee.

### Conference Duty Areas

Conference Chair	Coordinates conference committees and meetings Develops and communicates conference budget Serves as Site Coordinator
Computer Workshops	Organizes hands-on workshops offerings, times, presenters Verifies that software, internet, and equipment are available

Door Prizes	Solicits items for door prizes
Fund Raising/Silent Auction	Organizes and conducts the drawings/selection of winners Organizes the WBEA Professional Development Silent Auction Works with Finance Chair or WBEA Treasurer to collect bidders' money Might be combined with Door Prizes committee
Finance	Manages all moneys connected with the conference
Exhibits	Recruits possible exhibitors/vendors Assigns table/booth space and oversees setup and teardown Ensure that exhibitors/vendors receive a conference program
Hospitality/VIPs' Gifts	Provides an information table during the conference Coordinates the distribution of gifts for speakers, VIPs, and attendees
Program	Plans workshops and general sessions Finds presenters for workshops and general sessions
Audio Visual	(might be within the Program committee) Gathers A/V equipment and ensures it is where needed during sessions
Publicity	Designs and coordinates all publicity for the conference Works with website and newsletter editors Updates publicity as program is developed
Registration	Processes conference registrations Prepares name tags and conference bags for each registrant Manages the registration booth during the conference
Special Events	Includes organizing business visits and activities other than workshops and general sessions

#### DUTIES OF EACH COMMITTEE

Each committee should develop a budget and submit it to the Conference Chair who then should create the budget for the conference. Each committee chair should communicate regularly with the Conference Chair.

#### Conference Chair

This person will serve as chair of the conference. The Chair will work closely with the President and confer regularly with committee chairs. The Conference Chair is the key negotiating official for the conference and should be knowledgeable about contracts and budgets for the conference.

1. Organization
  - a. Appoint committee chairs.
  - b. Preside over planning sessions and committee meetings.
  - c. Monitor that conference plans proceed on schedule.
  - d. Coordinate communications between the WBEA President and committees.
2. Preparation of the Conference Budget with WBEA President
  - a. Establish expense policies in advance. Approve expense payments.
  - b. Work with the committee chairs in seeing that proceeds and bills are submitted and deposited in a timely manner.
  - c. Oversee that budget is being followed.
  - d. Submit a final report to WBEA President.

3. Reports
  - a. Report to WBEA President frequently on the progress of conference plans.
  - b. Submit a financial report of the conference to WBEA President and the Annual Conference Advisory Committee after the conference is concluded.
  - c. Submit a report of conference numbers and breakdowns, sleeping rooms, meal costs, and contracts to WBEA President and Annual Conference Advisory Committee.
  - d. Prepare conference evaluation form. This form may be placed in participant's registration packet or done online. Include results in the final conference report.
4. Printed Program (should be coordinated with Program Committee)
  - a. A tentative budget for the printed program and ad pricing should be determined at least 16 months before the conference.
  - b. Oversee and approve the design, layout, and content of printed program. The printed program should include:
    - i. Lists of WBEA officers, WBEA and S/T/P Executive Board members, conference committee members, past presidents, future conference sites, award recipients, exhibitors, and conference contributors.
    - ii. Welcome notes from the WBEA and S/T/P Presidents and the Conference Chair may also be included. (See previous programs.)
    - iii. Information from the Professional Development Director regarding the program for Professional Development Leadership Training.
    - iv. All dates, times and location of meetings and activities that are part of the conference.
    - v. A diagram of the venue meeting rooms. Presenter vitae and breakout descriptions may be included if space is available or this information could also be put on website prior to conference. (Be sure to advertise if this is available.)
5. Last, But Most Important!
  - a. Have only one person authorized to approve hotel expenditures.
  - b. It is imperative that only one person signs checks.
  - c. Plan your budget. Charge enough to control costs, cover expenses, and make a profit.

#### Site Coordinator

NOTE: It may be more practical for the conference chair and site coordinator to be the same person.

The site coordinator will work directly with the conference site facility on matters pertaining to the facility, room scheduling and setups, banquets, audio visual equipment, food, conference headquarters, other equipment, etc. It is suggested that this person live near the site.

1. Equipment and Supplies
  - a. Location of available power outlets
  - b. Controls for speakers, lights, etc.
  - c. Adequate direction signs
  - d. Availability of piano, if needed
  - e. Pencils, and pads provided
  - f. Determine any extra cost for equipment
  - g. Available A/V Equipment
    - i. Determine union regulations regarding operation of A/V equipment
    - ii. Recommend providing one screen, one projection table wired and one six-foot table in each breakout room. This is a typical hotel A/V package.



- iii. Work closely with the hotel A/V manager to reduce cost of equipment.
  - iv. What equipment is available? Screens (sizes), extension cords, spare lamps, sound system
  - v. Easels, pads, markers, whiteboards, pens, erasers
2. Meals
- a. Head table arrangement—to be determined by WBEA President
    - i. Elevated head table
    - ii. Number of places at the head table
    - iii. Place cards set in place
    - iv. Notify those sitting at the head table
  - b. Decorations
    - i. Check fire regulations regarding inflammable materials.
    - ii. Cool storage for flowers
    - iii. Flags (US and Canadian)
  - c. Public Address System
    - i. Podium
    - ii. Lavalieres vs. fixed microphone
    - iii. Lighting
    - iv. Projection facilities. Use in-house sound whenever possible.
  - d. Food
    - i. Menu variety
    - ii. Food charges including tax, tip, and gratuity
    - iii. Final guarantee schedule
    - iv. Final event count deadline
    - v. Determine responsible hotel staff person

### Registration Committee

The committee will be responsible for all registration details including processing, packets, name badges, ribbons for the conference. The committee is responsible for a post-conference report on the number of conference attendees, affiliations, meal numbers, etc.

- 1. Registration Policies should be established early and should include
  - a. Payments via credit cards, checks, or cash
  - b. Refunds and cancellations—set deadlines and amounts
  - c. Follow WBEA Registration Guidelines (Section A8041, WBEA P & Ps)
  - d. Identify who are dignitaries, guests, and speakers
  - e. Schedule workers during the conference
- 2. Registration Supplies should at the conference should include
  - a. Registration packets for pre-registrants and registrations received on site
  - b. Programs (should be included in the packets) and one at registration desk for reference
  - c. Cash boxes with change
  - d. Receipts, name tags, and ribbons
  - e. Tickets for all events (color coded and numbering helps keep track of counts)
  - f. Tables and chairs
  - g. Computer and printer
  - h. Pitcher of water and glasses
  - i. Pencils, pens, and scratch pads

- j. Posted directions on registration processing and policies
- 3. Have all tickets in envelopes/packets with names on the top and filed alphabetically for pre-registrants.
- 4. The registration process should include
  - a. Printed receipts for each registrant (needed for tax and reimbursement information)
  - b. Verify and deposit all funds collected
  - c. Relief of registration workers for breaks
  - d. Secure storage area when registration closes

WBEA Conference Registration Guidelines (A8041, WBEA Policies and Procedures)

- 1. Registration fees will be determined by the conference committee. The total amount to be paid should be adequate to cover projected costs. The registration fee primarily covers attendance at conference workshops. It may or may not cover the costs of meal functions. Special activities should generally be charged separately.
- 2. It is appropriate to provide a deadline for registration with an increased fee for late or on-site registrations.
- 3. Cancellation and refund requests must be in writing, and a deadline for receiving such requests must be established. This date should coincide with committee needs for confirming guarantees with the hotel.
- 4. The registration fee is required of all WBEA registrants as well as registrants from the host S/T/P.

NOTE: WBEA or Host S/T/P members appearing on the program as speakers or coordinators must register for the conference and pay the required registration fee.

- 5. A reduced registration fee is provided for RETIRED and STUDENT members. In determining the reduced fee, consideration should be given as to whether meal functions are included. Covering direct participant expenses should be the key to determining the reduced fee.
- 6. Professional members from other NBEA regions are accorded the same registration fee as WBEA professional members.
- 7. Complimentary registrations are extended to:
  - a. Program participants from regions other than WBEA. (Includes Regional Presidents, NBEA President, NBEA Executive Director and/or NBEA Membership Director, and other national presidents of professional organizations affiliated with NBEA/WBEA.)
  - b. Speakers outside the educational field. Generally, they are provided with complimentary meals for the day of their presentations if the meal functions are charged separately.
  - c. Exhibitors. Generally applies to exhibit days of conference and covers workshop attendance. If meal functions are included in the registration fee, exhibitors may be invited to purchase individual meal tickets.
  - d. Complimentary name tags may be provided for non-business educators who are the guests of paid registrants.
- 8. For statistical purposes, the registration form should provide appropriate blanks for participants to indicate institutional affiliations as well as NBEA regional affiliation and member classification.
  - a. Institutional affiliation categories include Secondary, State Department of Education, College/University, Voc-Tech Center, Junior/Community College, Private Business College, City/County Supervisor, Junior High School, Business/Industry.

- b. Regional affiliations include Eastern (EBEA), Southern (SBEA), North Central (NCBEA), Mountain-Plains (M-PBEA), and Western (WBEA).
- c. Member classifications include Professional (Teacher, Supervisor, Administrator, Other), Retired, and Student.

It is also appropriate to include a box to be checked by those attending their first WBEA Conference. This provides an opportunity for special recognition (for example, by using different colored name tags). It is also appropriate to include a box to be checked by those attending the conference who agree to allow their contact information, including email address, to be released.

#### Additional Registration Guidelines

1. The registration fee may or may not include meal functions; however, including meals helps to meet counts and costs of food commitments in your contracts.
2. Complimentary registrations may be for conference attendance only and do not need to include meals. Those receiving complimentary registrations may purchase meals they wish to attend.
3. A policy for Cancellation/Refund requests should be in writing and a deadline for receiving such requests must be established. It is recommended to charge a processing for refunds.
4. The registration fee is required of all WBEA and S/T/P members. If a registrant is a Business Education instructor or administrator, they should join WBEA and pay the member registration fee or pay the nonmember registration fee (which should be greater than the member fee plus dues).

#### Exhibits/Vendors Committee

The committee will seek, invite, and assist exhibitors for the conference. This committee will determine prices for exhibit/vendor space, type of booths (draped or tables), arrangement of space, and what the space will include. Provide each exhibitor/vendor with an **Exhibit Rules and Information Sheet**.

The following is a list of tasks to be completed:

1. Obtain a floor plan of exhibit space from the hotel.
2. Determine the hours of the exhibits, the setup date and time, and the tear down date and time.
3. Determine what each booth will include (draped table(s), electricity, signage, wastebasket?).
4. Determine the cost of exhibit space and set booth charges accordingly.
5. Develop a contract for renting exhibit space. Including space, electrical power, outlets, and furniture plus conference income amount.
6. Determine the storage for exhibitors before and after setups of exhibits.
7. Obtain a contract for security for exhibits when exhibits are closed.
8. Identify and contact possible exhibitors by obtaining a list of names from
  - a. Previous exhibits committee chair
  - b. Websites
  - c. Committee members of conferences held by related organizations
  - d. Trade publications
  - e. Past exhibitors
  - f. Members of your association
9. Offer complimentary table exhibit space to NBEA, ISBE, ABTR, student organizations, and next year's WBEA conference committee.

10. Keep the following points in mind:
  - a. Reputation of the exhibitor's product or service
  - b. Exhibitor's ability to pay for space
  - c. Company's previous exhibit history with association
11. Ask Exhibitors for donations/contributions to support specific events during the conference
  - a. Door prize item
  - b. Silent auction item
  - c. Sponsorship of refreshment break
  - d. Sponsorship of speaker or breakout session

### Exhibit Rules and Information

The following are items which should be included in an Exhibitor/Vendor Contract. In the enforcement and interpretation of the rules and regulations, the decision of the Exhibits Committee is final.

1. **Eligible Exhibits:** The Exhibits Committee reserves the right to determine the eligibility of any company or product for inclusion in the conference. And, it reserves the right to reject, eject, or prohibit any exhibit or exhibitor.
2. **Installation of Displays and Tear Down:** Dates and hours for installation, display, and tear down will be as specified. Exhibitors will not be permitted to tear down their exhibits until after the Exhibition is officially closed. All storage and handling charges for failure to remove exhibit material from the conference floor at the conclusion of the move-out period shall be a responsibility of the exhibitor.
3. **Liability:** The exhibitor agrees to make no claim, for any reason, whatsoever, against WBEA, the conference sponsors, or other contractors for loss, theft, damage, or destruction of goods, or for any injury to himself or employees. Nor will claim be made for any damage of any nature or character, including damage by reason of the failure to provide space for the exhibit or for removal of the exhibit or for failure to hold the conference as scheduled.
4. **Damage to Property:** Exhibitors are liable for any damage caused to building floors, walls, and columns, to standard equipment, or to other exhibitor's property. Exhibitors may not apply paint, lacquer, adhesive, or any other coating to building columns and floors or to standard table/booth equipment.
5. **Unoccupied Space:** The Exhibits Committee reserves the right, should any rented exhibitor's space remain unoccupied on the opening day, or should any space be forfeited due to failure to make payment in full one month prior to the conference date to rent space to any other exhibitor or to use that space for such purposes as it may see fit without liability on its part. This clause shall not affect the obligation of the exhibitor to pay the full amount specified in the space rental invoice should the Exhibits Committee not resell the space.
6. **Fire, Safety, and Health:** The exhibitor agrees to accept full responsibility for compliance with local, city, and state fire, safety, and health ordinances regarding the installation and operation of equipment. This responsibility includes use of safety guards and devices where necessary to prevent personal accident to spectators. Only fireproof materials should be used in displays. The necessary fire precautions will be a responsibility of the exhibitor.
7. **Exhibitor Responsibility:** Each exhibitor must keep at least one attendant in the table/booth during all conference hours.

## Program Committee

The committee will be responsible for speakers and session leaders. Decisions need to be made about the number of sessions, location of sessions, topic of sessions, keynote speakers, etc. The following are the procedures used to secure speakers for the conference:

1. Select a chair and at least one additional person for this committee. The Computer Workshops may be part this committee but should have a separate Chair. Scheduling and topics should be coordinated between program breakouts and computer workshops.
2. Distribute a Call for Presentations to each S/T/P, exhibitors, and others who may have possible topic/presenter input. Ask each to submit a list of possible topics and possible speakers for those topics by a specified date.
3. Make phone calls and send emails. Delegate specific speaker topics to specific people. For example, ask someone with IT connections to secure IT speakers.
4. Secure from each speaker the following information. Ask for electronic file so you don't need to rekey the information.
  - a. Short and concise title of presentation
  - b. Brief (one paragraph) synopsis of presentation (to use in program or on the website.)
  - c. Specific equipment requirements: **The only equipment provided for speakers should be a screen, a projector table, and a 6-foot table.**
  - d. Brief bio to use during introductions
  - e. Name, title, place of business, address, city, state, zip, email (for confirmation letter and follow-up thank you)
5. Provide the following information for speakers:
  - a. Room capacity and layout (classroom versus theater) (for number of handouts)
  - b. Date of conference including time and room number/**name** for presentation
  - c. Pre-conference program
  - d. Directions to conference site
  - e. Registration and hotel reservation instructions
  - f. What is included in their registration (what they will have to pay for and what is complimentary)
  - g. Where they should check-in when arriving or before their presentation.
  - h. Notice of who will be introducing them.
6. Send confirmation letter to all speakers.
7. Select someone to be responsible for securing speaker introducers. (Target business education preparation program undergraduates, CTSO students, board members, etc.) This person should distribute the speaker bios and speaker times to those introducing presenters. Provide instructions for introducing the speaker, presenting speaker gift at end of presentation, and distributing the breakout evaluations.
8. Write a thank you to speakers at the end of the conference.

## Computer Workshop Committee

The Computer Workshop Committee is responsible for the planning and scheduling of the computer/hands-on workshops offered during the conference. The following are some procedures which can be followed in planning the workshops.

1. This committee may be part of the Program Committee and should coordinate computer topics with breakout topics and times. The Computer Workshop Chair should be a separate person from the Program Chair.
2. Secure a computer lab
  - a. Room in hotel with vendor-donated computers or rentals
  - b. Nearby facility—school, community college, university, or business
  - c. Talk with previous chairs to see what they did
3. Communicate with hotel as to lab facility, software, and network needs (Internet capability, etc.)
4. Communicate with educational facility or business as to lab features, software, network, and internet ability.
5. Determine topics to be covered
  - a. Secure speakers—vendors may be helpful
6. Determine workshop fees for participants and the maximum number who can participate. Fees should cover the cost of the workshop and there should be only one participant per machine.
7. Work with registration chair to coordinate workshop registrations, location, and fees.
8. Work with program chair to secure speaker biographical information, session descriptions, and A/V needs. If workshops are held off-site, coordinate with Tours, Travel, and Special Events Committee for transportation requirements.

#### Tours, Travel, and Special Events Committee

The committee's responsibility is to set up tours and identify special events unique to the area of the conference. The committee may seek assistance from the Chamber of Commerce, convention/visitors bureau, or travel agencies.

Tasks and responsibilities for the committee may include:

1. Identify special events in the area scheduled during the conference and promote them.
2. Contact businesses to see if tours can be arranged.
3. Get contact names for selected businesses.
4. Arrange dates and times with contact person(s) for tours.
5. Arrange for transportation, if necessary.
6. Before the conference, confirm dates, times, and numbers participating with businesses.
7. Make sure payment for transportation is arranged.
8. Verify again with the businesses one or two days before the scheduled tour.
9. Connect with transportation company to verify payment received.
10. Arrive at conference site early the day of the tour.
11. Send thank you letters.

#### Publicity Committee

The committee will be responsible for all conference publicity. Publicity should include all printed flyers, newsletter articles, website information and should include working with S/T/P newsletters and websites as well as WBEA's. This committee will be responsible for:

1. Prepare a tentative plan and budget to be submitted to the conference chair 16 months before the conference.

2. Getting pictures from the conference photographer and sending appropriate news releases to subject's local media and state, regional, and national newsletters.
3. Having a canned news release describing the participant's conference activities for conference attendees to use.
4. Prepare conference brochures and flyers.
5. Prepare and send a first mailing of conference publicity and registration information.
6. Promote conference with all S/T/Ps. Some may have summer conferences.
7. Submit conference articles to the Western News Exchange.

### Finance Committee

The committee chair will be the conference Treasurer. All monetary transactions will be the responsibility of this committee and interim and final income statements will be produced.

1. Select a bank that the offers free checking, has easy access for Treasurer. The Registration and Exhibits Chairs should be able to mail deposits.
2. Get signature card from bank signed by Treasurer, WBEA President, and Conference Chair. Although all will have signatory authority, restrict the writing of checks to ONE person.
3. Create a "Payments Requisition Form" and distribute to all committee chairs
4. Work with the WBEA President and Conference Chair in creating the budget. (See Appendix for a sample **WBEA Conference Budget**)
5. Request startup funds from WBEA and S/T/P (\$1000 each).
6. Have Exhibit and Registration Chairs mail the Finance Chair/Treasurer detailed information about all deposits they make.
7. Ensure letters and/or invoices are sent to sponsors requesting payment of fees/registrations.
8. Pay expenses that have been approved by the Conference Chair. Completed Payment Requisition Form, accompanied by receipts, must be submitted and on file prior to payment of expenses.
9. Pay back all start-up monies to WBEA and S/T/P before determining the conference income to be split. WBEA will also receive \$1 per registered attendee, which is earmarked for the Leadership Development.
10. Submit dues received from registrants on a regular basis to the associations. Only when their dues are received by the Associations are they considered new or continuing members and will receive the membership benefits.
11. Close bank account, sending WBEA and S/T/P their share of the conference profits, minus additional bills attributed to the respective organization.
12. Final conference reports created include:
  - a. Budget and final amounts for each category
  - b. Checks/Deposit Breakdown
  - c. Income and Expense Statement

### Hospitality Committee

The committee will be responsible for hosting and maintaining a hospitality room or table during the conference. (Retired members may be IDEAL for this task). The staff should meet and greet presenters and special guests and direct them as needed. The committee will work closely with other committees, so constant communication is a must.

1. Insure that hotel space has been arranged.
2. Prepare a budget for the committee and share with the conference chair.
3. Arrange for refreshments in room. Hotel food will be very costly. Verify that the hotel will allow you to bring in your own food.
4. Secure ribbons for speakers, board members, committee members, if the Registration Committee is not doing this.
5. Distribute speaker packets to the speakers as they arrive.
6. Secure conference favors that showcase the host state's attributes.
7. Insure that session facilitators have introductions, breakout evaluation forms, and speaker gifts for sessions. (Work with Program Committee.)

#### VIP/Speaker Gifts Committee

The committee will be responsible for acquiring gifts for speakers, WBEA Board members, and other VIPs. This may be a person on the Hospitality or Program committee. Responsibilities include:

1. Obtaining a list or number of speaker/presenters who will be presenting at the conference.
2. Obtaining a list of keynote/general session speakers who will be presenting at the conference.
3. Obtaining a list of WBEA Board members.
4. Cross referencing the lists for duplicate names so that only one gift is presented per person.
5. Checking with conference and finance chairs on the budget for gifts.
6. Wrapping & tagging gifts for presentation at conference.
7. Coordinating the distribution of the gifts.

#### Door Prize Committee

The committee will acquire and distribute door prizes.

1. Select a chair and at least one additional person for this committee.
2. Request a door prize from each S/T/P, exhibitors, board members, and local businesses.
3. Door prizes may be of any value—fun or serious.
4. Label each prize with the donor.
5. Specify a location and time for donations to be delivered if they are not sent before the conference. The registration booth or exhibits area are good places.
6. Determine the number of functions at which door prizes will be distributed. For example, an easy way to distribute prizes is with meal tickets. As they enter the room, collect the tickets in a basket with their names written on the backside of the ticket. Collecting tickets this way also ensures that people have purchased a ticket for the meal.
7. Divide the number of door prizes by the number of functions at which you will distribute prizes. Place prizes for each function in separate boxes. (Hint: bring a portable, collapsible luggage cart to carry boxes of prizes to each function.)
8. Be aware of the program time constraints when drawing and awarding prizes.
9. Optional: Make a list of prizes and their donors to stuff in registration packets or make available during the conference. This is not necessary; but when businesses donate, you can tell them you will publicize their donation. If you want to distribute this publication, ask states to send you a list of prizes and their donors by a specified time before the conference. Include your email address in the instructions to each state.



### Silent Auction/Raffle Committee

The purpose of this committee is to raise money. WBEA uses these funds to promote Professional Development activities. Setting and reaching a goal will contribute a significant amount of money.

1. Send letters six (6) months before the conference to S/T/P Presidents asking them to bring something representative of their state for the auction. Ask them to write a description of the items which can be included on the bidding sheet.
2. Secure a place in the hotel to display the auction items (preferably near the exhibits). Use skirted tables and allow room to move around the tables.
3. Contact WBEA President to remind S/T/P Presidents to bring auction items.
4. Collect the items at the registration booth or silent auction location.
5. Post the opening and closing times for the auction.
6. Display each item with a bid sheet listing the item, contents, minimum bid, and bid increments.
7. After the auction, determine the winner of each item.
8. Collect money and distribute the items. Have checks made out to WBEA.
9. Turn over all money raised to the WBEA treasurer.
10. Write thank you letters to those who donated items.

### Audio Visual Committee

The committee will be responsible for coordinating and obtaining A/V equipment needed for the conference. Responsibilities and tasks include:

1. Obtaining a map of hotel meeting rooms.
2. Identifying location of electrical outlets and Internet connections in each room.
3. Working with the conference and program chairs, determine needs of conference presenters—kind and number of each piece of equipment needed.
4. Coordinating with conference chair any possible room changes that may need to be made to make the sharing and moving of A/V equipment easier. Do this before the final program is printed.
5. Identifying where you can get the equipment.
6. Setting up the equipment in each room prior to each session.
7. Storing and securing all A/V equipment at the end of each day.

# APPENDIX

## WBEA CONFERENCE PLANNING GUIDE REVISED 2020

A 8030 APPLICATION TO HOST WBEA CONFERENCE

**A8030. APPLICATION TO HOST WBEA CONFERENCE  
WESTERN BUSINESS EDUCATION ASSOCIATION**

Name of sponsoring S/T/P \_\_\_\_\_

Dates of conference \_\_\_\_\_ Estimated attendance \_\_\_\_\_

Location of conference \_\_\_\_\_  
(City) (State/Country)

Conference site (hotel) \_\_\_\_\_

Current guest-room rates at this property \_\_\_\_\_

Projected property guest-room rates on conference date \_\_\_\_\_

Projected costs, if any, for use of function space \_\_\_\_\_

Please attach information to support the availability of public transportation to the conference site. If possible, also include estimated travel costs from selected locations (near and far) within the Western Region.

Current WBEA/NBEA and S/T/P membership \_\_\_\_\_

Is there an expected change in the total membership by the proposed conference date?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

Conference profits will be divided as follows: WBEA \_\_\_\_\_% S/T/P \_\_\_\_\_%

Potential S/T/P members for a conference committee are:

(1) \_\_\_\_\_ (2) \_\_\_\_\_

(3) \_\_\_\_\_ (4) \_\_\_\_\_

A projected budget for the conference and a brief summary of the marketing strategy to be used to support the budget must accompany this application.

NOTE: This application must be signed by the current S/T/P President and at least one (1) of the S/T/P members, named above as a potential committee member.

\_\_\_\_\_  
S/T/P President

\_\_\_\_\_  
Date

\_\_\_\_\_  
S/T/P Committee Member

\_\_\_\_\_  
Date

CONFERENCE BUDGET SAMPLE

2014 WBEA Conference  
 Double Tree Hotel--Lloyd Center  
 Portland, Oregon  
 February 14-17, 2014

Income				Expenses				
	# People	\$ Amount	Budget	Subtotal		# People	\$ Amount	Subtotals
Registrations:					Administration (Bank Fees)			\$ 500.00
Member					Audio Visual			\$ 500.00
Early	120	220	26400		College Credit			
Late		320	0	\$ 26,400.00	Computer Workshops			
Student Member					Decorations			\$ 800.00
Early	4	160	640		Door Prizes			\$ 300.00
Late		180	0	\$ 640.00	Dues			
Retired Member					Exhibits			
Early	18	170	3060		Facilitators			\$ 100.00
Late		190	0	\$ 3,060.00	General Session Speakers			\$ 250.00
NonMember					Gifts (Presenters, VIPs, Board)			\$ 1,000.00
Early		320	0		Hospitality			\$ 250.00
Late		380	0	\$ -	Past Pres. Recognition			\$ 100.00
Total Registration	142			\$ 30,100.00	Payment to PDI Fund	142	1	\$ 142.00
Professional Tours	20	20		\$ 400.00	Photographer			\$ 50.00
Wine Tasting (2)	30	25		\$ 750.00	Printing (Program, Publicity)			\$ 500.00
Computer Workshop	60	36		\$ 2,160.00	Publicity			\$ 1,000.00
Exhibits					Registration			\$ 350.00
Table Before 10/15	20	250	5000		Security			\$ -
2 Table After 10/15		275			Silent Auction			\$ 100.00
Extra Tables	4	100	400		Silent Auction Proceeds to PDI			\$ 1,000.00
Total Exhibits				\$ 5,400.00	Transportation (Tours & Workshops)	50	20	\$ 1,000.00
Sponsorships					Meals			
Silent Auction				\$ 1,000.00	DPE Breakfast	10*23	230	
Dues WBEA/NBEA					Memb/Pres-Elect Bkfst Sponsor	25x\$23	575	
DPE Breakfast	10	23		\$ 230.00	President-elect Refreshments			
				\$ -	Board Meeting Refreshments			
Tours	50	25		\$ 1,250.00	Exhibitors' Reception	150*30	4500	
					PDI Rest. Order			
					Open Bar Bartenders	2x95	190	
					Sat. a.m. Coffee	140x6	840	
					Saturday pm break	140x6	840	
					Sat. Lunch	150*35	5250	
					Sunday a.m. Breakfast	80x\$12	960	
					Sunday Dinner	60*48	2880	
					Monday, OBEA Awards	35x22	770	
					Total Food Costs			\$ 17,035.00
Total Proj Income				\$ 41,290.00	Total Expenses			\$ 24,977.00
					Projected Conference Profits			\$ 16,313.00
					50% to OBEA/WBEA			\$ 8,156.50

## CONFERENCE SCHEDULE PLANNING SHEET

	THURSDAY	FRIDAY	SATURDAY	SUNDAY	MONDAY
8:00 am					
8:30					
9:00					
9:30					
10:00					
10:30					
11:00					
11:30					
12:00 pm					
12:30					
1:00					
1:30					
2:00					
2:30					
3:00					
3:30					
4:00					
4:30					
5:00					
5:30					
6:00					
6:30					
7:00					
7:30					
8:00					
8:30					
9:00					
10:00					

## CHECKLIST FOR MEETING ROOM INSPECTION

ROOM LAYOUT AND CAPACITY	TEMPERATURE
– What is the capacity of the room for different types of room setups?	– Is the room air conditioned?
– Are there pillars or other obstructions?	– Are there individual controls for cooling and heating?
– Will doors be in the rear of your meeting setup?	
– Is there a foyer?	FURNITURE AND EQUIPMENT
	– Is there a permanent stage? If not, can the facility create a speakers' platform?
LIGHTING AND ELECTRICAL HOOK-UPS	– Are the seats permanent or movable?
– Will light interfere with movie or slide projections?	– Is there a PA system?
– Do window curtains darken the room sufficiently?	– How many extra temporary seats are available?
– Will chandeliers reflect light into people's eyes?	
– What is the capacity of electrical outlets?	OTHER FACTORS
– What is the capacity of electrical outlets?	– Can beverages be served in a room nearby area or in the same room?
	– Can food be served in the meeting room?

## CHECKLIST FOR SITE NEGOTIATIONS

Once you have selected your preferred site, go over the following details with the facility's management.

FUNCTION ROOMS	FOOD AND BEVERAGES
– How many will be needed? When?	– What dining rooms are available?
– Are they in one area? On several floors?	– What is the price range for meals?
– What is the charge for room use?	– Are there state or local liquor regulations?
– Are any rooms free of charge?	– What is the policy or procedure on gratuities?
– Is a meeting headquarters available? Is there a pressroom?	– What are special charges for bartenders and table flowers?
– Is there a locked supply or storage room available?	– Who will arrange for meals, breaks, and parties?
– How much of the facility will be occupied by other groups? Will site notify you as to additional bookings made?	
SLEEPING ROOMS	PERSONNEL
– How many will be needed?	– Who is assigned to handle all arrangements: before the event? during the event? in the evenings?
– Will the site print reservation cards? When available? Who will mail them?	– Are there union regulations to consider?
– How long will block of rooms be held?	
– What is checkout time?	SAFETY AND SECURITY
– Is there a late checkout policy?	– What security arrangements are available?
– Will there be complimentary sleeping rooms or suites?	– What are the fire regulations?
– What if you need more rooms than in the block?	
EQUIPMENT	FINANCIAL ARRANGEMENTS
– Is there closed circuit TV?	– Does the site require an advance?
– What equipment is available free?	– What arrangements will be made for receipt and payment of bills?
– What equipment is available for a fee? What is the charge?	– What credit cards will be accepted?
SIGNS	OTHER SERVICES
– Regulations or restrictions on posting signs?	– Is a photocopy service available?
– What directional signs are provided?	– Is there limousine or bus service to airports and other terminals?
	– Is free parking readily available, or is there a fee? Is valet parking available?

CALL FOR CONFERENCE PRESENTATIONS SAMPLE

WBEA/OBEA Invites you to the City of Roses for

Relevant  
Opportunities &  
Strategies for  
Excellence



2014 WBEA/OBEA Conference

February 13-17, 2014  
DoubleTree by Hilton

1000 NE Multnomah Street  
Portland, Oregon 97232

**CALL FOR CONFERENCE PRESENTATIONS**  
**Please Submit by March 22, 2013**

Name of Presenter(s): \_\_\_\_\_  
(to be printed on conference name tag)

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Phone: \_\_\_\_\_ (home) \_\_\_\_\_ (work) Fax: \_\_\_\_\_

Email: \_\_\_\_\_ WBEA Member: Yes No  
(Attach information for additional presenters)

Title of Presentation: \_\_\_\_\_

- Type of Presentation:** (check one)
- Breakout Session (60 min.)
  - Computer Workshop (2 hours)
- Projected Audience:** (check all that apply)
- Secondary Teacher
  - Middle School Teacher
  - Other (specify) \_\_\_\_\_
  - College/University Instructor
  - All Business Educators
- Topic of Presentation:** (check all that apply)
- Office 2013/Windows 8
  - Social Media Issues
  - iPads/iPhones/iCloud
  - Career Development
  - Teaching Strategies
  - Business Curriculum
  - Going Green
  - Legal/Political Issues
  - Best Practices
  - Finance/Economics
  - Entrepreneurship
  - Motivation/Types of Learners
  - Management/Leadership
  - The Big Picture: The Future
  - Changing Demographics
  - Communication
  - Online Learning
  - Other \_\_\_\_\_

Please submit your proposal by email to: (put in email information)

Please attach the following:

- Presentation Description (as to be printed in the conference booklet—please limit to 150 words)
- List three learning objectives for this presentation
- A short biography to be used for session introductions—no more than 50 words



REGISTRATION FORM SAMPLE



2015 WBEA/ABEA Regional Conference  
 "Highlighting Education And Technology"  
 May 20 - 25, 2015  
 The Scottsdale Plaza Resort

[www.wbea.info](http://www.wbea.info)  
[www.azbea.org](http://www.azbea.org)

Name \_\_\_\_\_ NBEA Member # \_\_\_\_\_  
 School/Business Name \_\_\_\_\_  
 Preferred Mailing Address: \_\_\_\_\_  
 City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal \_\_\_\_\_  
 Preferred Phone \_\_\_\_\_ Preferred Email Address \_\_\_\_\_  
 Name for Badge \_\_\_\_\_ Guest Name for Badge \_\_\_\_\_  
 Please Check: Secondary Postsecondary Administration Retired Student **First Time Attendee**

		Amount		
Early Bird Member (Postmarked by January 1, 2015)	\$180			
Member (Postmarked by April 24, 2015)	\$220			
Member (Postmarked after April 24, 2015)	\$320			
Retired Member (Postmarked by April 24, 2015)	\$180			
Retired Member (Postmarked after April 24, 2015)	\$220			
Full-time Undergraduate Student Member (By April 24, 2015)	\$180			
Full-time Undergraduate Student Member (After April 24, 2015)	\$220			
Non-member (Postmarked by April 24, 2015)	\$300			
Non-member (Postmarked after April 24, 2015)	\$380			
Guest for meal functions (see Guest meal fees)	\$50			
Dues: NBEA/WBEA \$80 NBEA/WBEA/ISBE \$110 ABEA \$25 DPE \$60				
Meals (Tickets required for all meals)	Registrant Fee	Guest Fee	Amount	Please check Yes or No for meal functions
Friday Exhibitors Reception	Included			Yes No
Saturday Luncheon Penne Rustica (Chicken) Vegetarian	Included			Yes No
Sunday DPE Breakfast	\$35			Yes No
Sunday Awards Dinner Steak Chicken Salmon Vegetarian	Included			Yes No
Subtotal of Registration, Dues, Meal Fees				

The Scottsdale Plaza Resort  
 7200 North Scottsdale Road  
 Scottsdale, AZ 85253  
[www.scottsdaleplaza.com](http://www.scottsdaleplaza.com)

Conference Room Rates:  
 \$109.00 Single/Double  
 \$139.00 Villa/Patio Suite

Reservation Line: 800-832-2025  
[res@scottsdaleplaza.com](mailto:res@scottsdaleplaza.com)

13.32% occupancy tax per day

Ask for WBEA 2015 rate

Deadline April 20, 2015

Computer Hands-On Workshops Laptops will be available or use your own	Workshop Times (2 hrs. long)		nt
Workshop 1: Office 2013 & Office 365	Saturday: 8:00 am – 10:00 am		
Workshop 2: Teaching Financial Literacy	Saturday: 8:00 am – 10:00 am		
Workshop 3: Windows 8.1 Update 1	Saturday: 1:40 pm - 3:40 pm		
Workshop 4: Accounting with Quickbooks	Saturday: 1:40 pm – 3:40 pm		
Workshop 5: Get Your iPad On	Saturday: 1:40 pm – 3:40 pm		
Workshop 6: Industry Certification with Certiport	Sunday: 9:00 am – 11:00 am		
Workshop 7: Self-Branding Through E-Portfolios	Sunday: 9:00 am – 11:00 am		
Workshop 8: Adobe Creative Cloud	Sunday: 1:30 pm – 3:30 pm		
Workshop 9: iCloud	Sunday: 1:30 pm – 3:30 pm		
	<i>Total Cost of Selected Computer Workshops:</i>		
Professional Growth Tours and Special Events	Times		nt
Tour 1: PING Factory	Friday: 9:00 am – 10:30 am		
Tour 2: Wrigley Mansion with Lunch	Friday: 10:00 am – 12:00 pm		
Tour 3: Scottsdale Fashion Square Back of the House	Friday: 1:00 pm – 3:00 pm		
Tour 4: Su Vino Wine Education and Trivia	Friday: 2:00 pm – 4:00 pm		
Tour 5: Hard Rock Café & “Suns” Back of the House	Sunday: 12:30 pm – 3:30 pm		
Tour 6: Top Golf with Lunch	Sunday: 12:30 pm – 3:30 pm		
Dinner: Western Networking at Rustlers Rooste	Saturday: 5:00 pm – 10:00 pm		
	<i>Total Cost of Selected Tours:</i>		
	Subtotal of Page 1 (Registration, Dues, Meals)		
	Subtotal of Page 2 (Computer Workshops)		
	Subtotal of Page 2 (Professional Growth Tours)		
	<i>Total Amount Due</i>		

### CANCELLATION POLICY

All refund requests must be made in writing to the registration chair  
\$50 Processing Fee will be incurred No Refunds after May 6, 2015

Check here if you do not want your school information released to participating exhibitors  
Check here if you do not want your photo released Form of Payment:

✓✓ Check or money order payable to WBEA/ABEA 2015 Conference ✓✓

Credit Card

✓✓ NO PURCHASE ORDERS WILL BE ACCEPTED

Credit Card Information:            VISA    MasterCard    American Express    Discover

Name on Credit Card \_\_\_\_\_

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Billing Address (if different from address on front) \_\_\_\_\_

Signature \_\_\_\_\_

Mail Registration and Payment to: (Insert conference name and address)

Register Online at: [www.azbea.org](http://www.azbea.org) or [www.wbea.info](http://www.wbea.info)

For Conference Use: Payment Received \_\_\_\_\_ Payment Amount \_\_\_\_\_ Payment Form \_\_\_\_\_

EXHIBITOR'S CONTRACT SAMPLE (2 PAGES)

**2014 Joint Regional/State Conference  
Western Business Education Association  
Oregon Business Education Association  
February 13-17, 2014  
DoubleTree by Hilton, Portland, Oregon**

In accordance with the terms of contract, the organization below contracts for exhibit space and services offered by Western Business Education Association (WBEA) at the conference to be held Thursday-Monday, February 13-17, 2014.

Name of Organization \_\_\_\_\_

Participant Name \_\_\_\_\_ Title \_\_\_\_\_

Address of Organization \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

*Check the way you wish to be contacted.* Phone  Fax  Email  Other \_\_\_\_\_

Name of organization, as it is to appear on identification sign \_\_\_\_\_

Official exhibitor badges should be prepared for the following personnel \_\_\_\_\_

\_\_\_\_\_

Description to include in conference Program \_\_\_\_\_

\_\_\_\_\_

**RESPONSIBILITY**

WBEA/OBEA and the sponsoring hotel shall not be responsible for any loss, damage, or injury that may occur to the exhibitors, or to the exhibitors' employees or property from any cause whatsoever prior, during, or subsequent to the period covered by this agreement. Exhibitor, on signing the agreement, expressly releases the Western Business Education Association and the sponsoring hotel against any claim(s) for loss or injury.

**SUBLETTING AND CANCELLATION**

Booth space(s) may not be sublet or shared without written authorization from the Exhibit Chair. No refunds will be made in the event of cancellation.

\_\_\_\_\_  
Exhibitor Signature, Title, Company

\_\_\_\_\_  
Date

**Exhibitor Registration** (CONTINUED)

Standard exhibit registration includes one 6' draped exhibit table and two chairs, name badge, program, program listing, two-day access to conference breakout sessions and keynote speakers, one complimentary reception and luncheon ticket, and wireless internet.

Number of Tables Requested \_\_\_\_\_ Electrical Outlet Required: Yes \_\_\_\_\_ No \_\_\_\_\_

Any Special Accommodations needed? \_\_\_\_\_

**Set up** Friday, February 14 2:00 p.m. – 7:00 p.m.  
**Opening General Session** Friday, February 14 5:00 p.m. – 7:00 p.m.  
**Exhibitor's Reception** Friday, February 14 7:00 p.m. – 9:00 p.m.  
**Open Exhibit Hours** Saturday, February 15 8:00 a.m. – 11:45 a.m. and 1:30 p.m. – 3:00 p.m.  
**Tear down:** Saturday, February 15 After 3:00 p.m. to 4:30 p.m.

Registration	Amount	Amount Paid
<b>Early Bird Special (received on or before October 15, 2013)</b>	<b>\$250</b>	
Regular Registration (received after October 15, 2013)	\$275	
Additional Tables @ \$100 per table	\$100	
Exhibitors Reception (1 Complimentary <input type="checkbox"/> Yes <input type="checkbox"/> No) Add'l @	\$30	
Saturday Luncheon (1 Complimentary <input type="checkbox"/> Yes <input type="checkbox"/> No) Add'l @	\$35	
Sponsorship Opportunities (see below)		
<b>EXHIBITOR'S REGISTRATION TOTAL</b>		

**Sponsorship Opportunities**

- |  |  |
|--|--|
| <input type="checkbox"/> Half page ad in conference program ..... \$75                                   | <input type="checkbox"/> Membership/President Elect Breakfast ..... \$500    |
| <input type="checkbox"/> Full page ad in conference program ..... \$125                                  | <input type="checkbox"/> Saturday, a.m. Exhibit Area Refreshments .... \$500 |
| <input type="checkbox"/> Program printing costs (includes full page ad on back of program) ..... \$1,000 | <input type="checkbox"/> Saturday, p.m. Exhibit Area Refreshments .... \$500 |
| <input type="checkbox"/> Sponsor Keynote Speakers* ..... \$1,000   | <input type="checkbox"/> Sunday, Breakfast..... \$500                        |
| <input type="checkbox"/> Opening Session ..... \$500   | <input type="checkbox"/> Monday, OBEA Breakfast..... \$300                   |
| <input type="checkbox"/> Friday, Exhibitors Reception ..... \$1,000                                      | <input type="checkbox"/> Other _____   |
- \*Includes half page ad in conference program

**Payment Information**

**This is a valid Perkins expenditure – WBEA Tax ID #93-081 6856**

Check enclosed made payable to WBEA in the amount of \$ \_\_\_\_\_  
 Credit Card American Express \_\_\_\_\_ Discover \_\_\_\_\_ MasterCard \_\_\_\_\_ Visa \_\_\_\_\_  
 Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Signature \_\_\_\_\_ Billing ZIP Code \_\_\_\_\_

**NO PURCHASE ORDERS ACCEPTED**

CANCELLATION POLICY: \$50 processing fee after December 15, 2013. NO refunds after January 15, 2014

**Return to:**

Name, WBEA Exhibits Chair  
 Address

Email Questions to:  
 Phone:  
 Fax:

CONFERENCE EVALUATION FORM SAMPLE

BUSINESS EDUCATION: BRANCHING OUT IN THE FUTURE

Evaluation of WBEA Conference  
February 17-20, 20XX

Please help make our next Conference meaningful by completing this form.

Please place a check mark in the appropriate category and feel free to make additional comments.

	Excellent	Good	Average	Poor	Comments
1. Overall Conference	( )	( )	( )	( )	_____
2. Registration	( )	( )	( )	( )	_____
3. Physical Facilities (location, rooms)	( )	( )	( )	( )	_____
4. Conference Schedule (length, hours)	( )	( )	( )	( )	_____
5. Exhibits	( )	( )	( )	( )	_____
6. Meal functions	( )	( )	( )	( )	_____
7. Opening General Session	( )	( )	( )	( )	_____
8. Sessions	( )	( )	( )	( )	_____
9. Optional Special Events	( )	( )	( )	( )	_____
10. Closing General Session	( )	( )	( )	( )	_____

Strengths of this Conference: \_\_\_\_\_  
\_\_\_\_\_

Weaknesses of this Conference: \_\_\_\_\_  
\_\_\_\_\_

Suggestions for future Conferences: (speakers, topics, etc.) \_\_\_\_\_  
\_\_\_\_\_

Other Comments: \_\_\_\_\_  
\_\_\_\_\_

## CONFERENCE SUMMARY DATA SHEET

Fill in the following data as soon as possible after your conference. It will help those who do future conferences do their budget, set fees, anticipate attendees, and schedule. Send copy to Annual Conference Advisory Committee.

Item	Number	Amount Charged	Additional Comments
Location/Hotel			
Chair			
Total Attendance			
Members			
Non-Members			
Guests/Spouse			
Retired			
Students			
Number of Late Registrations			
Registration Fees			
Members			
Non-Members			
Guests/Spouse			
Retired			
Students			
Late Registrations			
Meals (list each meal)			
Total Revenue			
Total Expenses			
Number of Exhibitors			
Table/Booth Charges			