

# WSACA Event Planning Guide

*"Event planning is like a high-wire act without a net."*

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## **Confessions of a so-called event planner.**

What can happen? Usually the unexpected! Event planners must be masters of discretion. From a so-called event planner who's seen and heard it all, I offer you some practical first-hand advice delivered in this Event Planning Guide.

Learn what you may come up against, how to problem-solve creatively and on the fly and better understand the principles of event planning.

There's an art to event planning. You may find yourself in a distressing, real-life situation that tests your ability to walk the fine-event-planning-line of giving vendors and attendees what they want and keeping your sanity.

Organizing a conference from the ground up requires a tremendous amount of forethought and data gathering. The reality of planning a conference is that, without any experience, you can lose a lot of time over-thinking each little detail while overlooking more important issues. To make the process simpler for first-timers, this planning guide outlines the most important steps while providing you resources and details on each particular subject. The result here is an event planning guide that will help you begin with a solid understanding in place.

Good luck!

Kris Swanson

# Article I Getting Started

## Section 1 The Planner

Having a competent person serve as planner is vital to the success of the conference because the planner is involved in every aspect of conference planning and execution. You need someone with the following qualities plus a few more:

- Possesses good organizational skills.
- Is a good communicator.
- Has an eye for details.
- Can function well even if things get a little stressful.
- A good sense of humor.

Conference planning requires a great deal of time devoted to administrative and clerical work. Conference execution requires a lot of management, especially for larger conferences with 200 participants or more, such as the State Elections Conference.

## Section 2 The Conference Planning Committee

Planning, organizing and conducting a conference can be rewarding and challenging. To develop a successful conference, you must employ the talents, cooperation, coordination, and participation of many individuals. For this reason, it is best to establish a Conference Planning Committee very early in the planning process.

A Conference Planning Committee is a group of people that holds some responsibility for shaping the conference and planning the program. Committee members should broadly represent your conference target audience. If the Association is sponsoring the conference, Auditor and/or their employees are usually appointed to the committee. However, it is not unusual to ask representatives from outside agencies who would have an interest in the conference to serve on the committee as well. A committee should be used to distribute the workload among many people, but the greatest benefit of using a committee is that it ensures the conference represents the thinking and planning of more than one individual.

Small conferences have small planning committees; larger conferences may need larger committees because there are more decisions to be made and there is more work to be done. Be careful—forming large committees can lead to problems. Getting everyone together for meetings is the most obvious difficulty. Getting everyone to agree on issues can be more serious. Certainly, situations will occur where complete agreement cannot be attained. The point here is not to create problems by assembling a committee that is so large that reaching agreement is difficult.

Look for individuals to serve on your committee who:

- Are qualified to serve due to their experience on conference topic related issues, respected by professionals in their field or their organization, with good negotiation and communication skills.
- Are dependable.
- Are able to accept responsibility.
- Work well with others.
- Can commit the time.

Once you begin to conduct planning meetings, the committee member's role will become more defined. The key to avoiding confusion or misunderstandings is to clearly explain to committee members the committee's purpose and function. On different issues the committee may be asked to advise or make recommendations, give its stamp of approval, or make a final decision. Additionally, there may be instances in which the Planner will use the committee as a sounding board; in these cases, the committee is asked to react without the responsibility to do anything more.

There are committee issues that the Planner needs to address, such as:

- Will committee members be reimbursed for pre-planning travel costs?
- How often will the committee meet?
- How long will the committee exist?
- Will the committee evaluate the conference?
- Will the work of the committee be recorded for future use?

The answers to these questions are especially important when the committee consists of representatives from various counties and organizations.

### **Section 3 Initial Communication**

The Association should be apprised of conference dates and locations by the Planner via email distribution, Association website, and the WSACA Newsletter as far in advance of the event as possible.

Updated conference information should be posted on the Association's website and advertised in any other means of communication or publication. Frequent communication is vital to conference planning and eliminates confusion and time spent answering those repeated questions.

### **Section 4 Conference Themes**

Themes should be established for conferences. The conference theme is the focal point for the program and serves to integrate various subject areas of the conference into a coherent whole. The theme should suggest the purpose of the conference, indicate the subject matter, be acceptable to all who might be expected to attend, and move individuals to action.

To determine the theme, consider the current topics of greatest interest to those attending the conference, topics that will have the greatest impact on their professional discipline, and try to identify the one subject that might be of most interest and concern to the subject matter during the conference year.

That topic, when appropriately phrased, should be the conference theme. A comprehensive, catchy phrase helps to make the theme fun and memorable.

## **Article II Host County**

### **Section 1 Host County Responsibilities**

(Taken from WSACA Standard Operating Policies and Procedures.)

Policy:

When a conference location is selected, the Conference Chair will contact the County Auditor of the host county and ask them to assist with the conference.

The degree to which the Host County participates is completely voluntary.

Host County will be asked to provide:

- Greeting speaker (greetings from the Mayor, for example).
- Trinkets or goodies for registration bags.
- After-hours tours or activities that showcase their County.
- Possible corporate sponsors.
- Recommendations and reservations for area restaurants for meetings or fellowship.

Procedure:

- Notify the County Auditor several months in advance of the conference.
- Invite the County Auditor to join your conference committee.
- Acknowledge the County Auditor in your program, and with a thoughtful gift.

## Article III Conference Venue

### Section 1 Conference Hotel Selection and Contract

The Planner is responsible for contacting and utilizing the services of Conference Direct to secure a conference venue. Initial meetings and tours should be scheduled with the potential conference hotel. The following are things to consider when securing a potential venue:

1. Dates for the conference should be finalized one year or more before the future conference.
2. Planner should execute a contract with the conference hotel up to 12 months prior, 24 months prior to the Elections Conference.
3. Planner should utilize the services of Conference Direct when submitting proposals.
4. Proposals should indicate the number of blocked rooms, room rate, and meeting room space based on past, similar conferences.
5. Room rates should be negotiated at government per diem rate, if possible.
6. Suites, upgrades, and comp rooms should be offered by the hotel and specified in the contract.
7. Free wireless internet connections should be negotiated for conference hotel rooms and, if possible, within conference room areas.
8. Room reservations should be handled directly by the hotel and no requirement for deposit should be negotiated.
9. Proposal should allow for Association to execute a credit application in lieu of down payments on the venue.
10. Adequate, on-site parking. Attempt to have parking charges waived, if possible.
11. Negotiate with hotel to waive any set-up fees, no-host bar fees, and meeting room fees based on food and beverage minimums.
12. Secure an all-inclusive, price-per-person cost based on all meals to be provided at conference with the hotel, if possible.
13. Since technical support for projectors, screens, microphones, podiums, and AV equipment could add hundreds of dollars to the cost, negotiate these charges in the contract if possible.
14. Make sure the hotel has ample meeting space for your needs; large and small conference rooms, dining space/facilities, space for vendors that is close to conference rooms with adequate electrical outlets. Contract should provide a sample of rooms, layout, and block of times.
15. Establish a "conference registration" area at the hotel and ensure the contract provides for a small, secure area for registration items.
16. Planner should establish a relationship with the event planner or manager at the conference hotel.
17. For the conference hotel to best meet our Association's needs, the Planner should provide the hotel with a tentative conference agenda and notify hotel staff immediately as changes occur.
18. Ensure the contract reflects language that allows for outside contractors to service conference needs.



## **Section 2 Hotel Loyalty and Reward Points**

Hotel loyalty clubs such as Hilton Honors and Marriott Rewards can offer the Association a variety of benefits. At the very least, simply joining a program and gradually accruing points over time can result in free rooms, upgrades, etc. that can help to offset future conference costs.

As a general rule, hotel point programs cannot be put under a group name, they must be registered under an individual name. In the case of planning a conference, points would be registered under an Auditor who's receiving points for any particular rewards program on behalf of the Association.

Hotel points are to benefit the Association, not the individual under which they are registered. The Planner should research hotels with available points prior to selecting the conference hotel.

## **Section 3 Hotel Rooming List**

Planner should request a rooming list weekly to reconcile against conference registrations and to ensure the room block is sufficient. The conference hotel room rate will only be made available to paying attendees, registered vendors and sponsors, and invited speakers and guests only.

## **Section 4 Hospitality Suites**

Hospitality suites provide great opportunities for networking of attendees. Vendors/sponsors are encouraged to host hospitality events that do not compete with each other, are controlled environments, adhere to hotel policies, and open to all conference attendees.

Large suites secured in the hotel contract by the Association may be offered to vendors to provide a hospitality suite for networking. The Planner will negotiate the rates with the vendor and the revenue will be used to offset conference costs.

## **Section 5 Use of Comp Rooms**

- Efforts should be made to negotiate 1 hotel room night per 40 room nights or 1 per 50 room nights.
- Remaining comp rooms will be used to offset lodging accommodations for speakers, presenters, and panelists.
- Comp rooms should first be applied to Association conference scholarship recipients.

## **Section 6 Upgraded Room Assignments and Suites**

Planner may apply upgrades as follows:

- Dignitaries
- Association President
- Planner or Conference Chair
- Committee Members

## **Article IV Conference Registration**

### **Section 1 Registration Policy and Procedure**

(Taken from WSACA Standard Operating Policies and Procedures.)

Policy: Conference committees shall accept registrations by check and bankcard.

- WSACA has an established conference registration webpage account (WHINDO).
- A conference webpage shall be established for each conference.

Procedure:

- Prior to each conference, the conference committee shall work with the communications committee to establish a conference webpage through use of the association's established account (WHINDO). This account will be linked to the association's PayPal account. The communications committee shall be responsible for coordinating the accounting of registration fees collected through these accounts with the Association Treasurer.
- Registration fees shall be accepted via check and bankcard through the established conference webpage account.

### **Section 2 Who Registers for Conference**

Anyone attending the conference shall register and pay for the conference in full. Partial registrations may be accepted for certain conferences as determined by the Planner.

Guest speakers and/or invited guests asked to present or attend the conference, do not generally register for the conference. The Planner may decide if and when this is applied.

Vendors attending the conference are required to register each of their attendees for the conference.

Partner Agencies such as the Office of the Secretary of State (OSOS), Department of Licensing (DOL), State Auditor's Office (SAO), Washington Association of County Officials (WACO), etc. should be invited to register for conferences.

An invitation email and/or conference registration should be sent out at least two months prior to the conference.

### **Section 3 Registration Cancellation**

At no time shall the Association incur fees (room reservation penalties, meal costs, etc.) due to the cancellation of an attendee's registration.

Cancellation dates are driven by the deadlines imposed by the hotel and are not flexible. No refunds or credits will be given to registrants who cancel after imposed deadlines or who fail to attend the conference. Absolutely no exceptions will be made for any reason, including medical or family emergencies or weather conditions.

Substitutions for paid registrants may be made at any time.

All cancellations made prior to the cancellation deadline are entitled to a full refund. A refund will be issued within 30 business days after the conference by the Association Treasurer.

## Section 4 Receiving Registration Funds

The Planner and/or designated Treasurer will maintain a master list of conference registrations received.

Prior to registration time, the Planner should decide on the best method for depositing registration funds in the Association's bank account. The receipt of deposits needs to be provided to the Association Treasurer. This information should be provided electronically or by fax.

If any advance payments need to be made, the Planner will inform the Treasurer of who to make the check payable to and the procedure for retaining and copying invoices for the merchandise/services. If the Planner should need advance funds to help with pre-conference expenses such as deposits, money shall be made available from the Association to the Planner with adequate documentation. The Treasurer shall keep records of any advance payments. W-9's must be provided by contractors and speakers in order to receive payment for services.

## Section 5 Registration Essentials

Registration is the first point of contact with your conference attendees, and a smooth process keeps excitement levels high and sets the tone for a great event. On the flip side, a disorganized and time consuming experience can leave the crowd grumbling all the way up until your event kicks off. With so much riding on the registration table, you definitely want to get it right the first time. Here are 6 points of consideration:

### Bigger is Better

Simple math tells us that large crowds will require more manpower if you want to avoid long lines. I recommend two attendants for every event and one floater. For the exhibitors, I recommend one attendant to serve and address their needs. As far as table needs, calculate for supplies and ample work space.

### Stay Connected

You don't want to be running through the halls searching for a power outlet or internet connection, so be sure to get these lines run to your table in advance. You'll also want to bring a laptop even if you don't plan on using it. Online access can come in handy if you need to check emails or help lost guests find their way to and from the venue. Last but not least, check the lighting situation. If the hallway is dimly lit then you might want to add a few desk lights to help with reading your lists.

### Bring a Tackle Box

Every planner should have a supply box filled with office essentials like tape, scissors and an assortment of markers. Other notable items for your packing list include blank nametags, registration lists, and printed material to use as needed. Yes, your venue will have access to most of these things, but the time and frustration you save by having them next to you is priceless.

### Find Your Rhythm

One of the biggest disruptors to your "registration rhythm" will be the barrage of simple questions coming from attendees. You can prevent these inquiries from slowing down the registration line by setting up a separate "help line" at the table. You'll be amazed at how much more efficiently check-in table can run when you have a dedicated person answering questions like "where is the bathroom?"

### Stay Open

It is essential to keep at least one person at the registration table throughout the event. You don't want a relatively minor problem to snowball into something larger because no one was available to help. This usually happens when guests are forced to look elsewhere when your team can't be found. It only takes one poorly timed bathroom break to send an impatient attendee off towards the kitchen area to request a salad without onions!

### Keep Your Friends Close

There are a few contact numbers you'll want to get well before the event kicks off. The first is the mobile number for the hotel Events Manager. There won't be time to scour the building when the paper towels run out in the bathroom, so this number is an absolute must-have. Another good number to have for food-related issues is that of the catering/banquet manager.

Remember, registration tables should provide more than just a welcome sign and name tag. From the guest's perspective, they represent the customer service center for your event. But in order to live up to this expectation you have to be prepared. After all, if guests can't make it past registration, then the rest of your planning efforts will.

## **Article V Speakers and Invited Guests**

### **Section 1 Registration**

Persons invited to attend an Association conference as a speaker, panelist, dignitary, presenter, or other guest generally do not register or pay a registration fee for the conference. See Article IV for more information.

### **Section 2 Costs Relating to Speakers and Invited Guests**

Costs relating to speakers and invited guests shall be paid from the conference budget. Costs are reimbursed for the invited guest only, not for their spouses or guests.

Speakers and invited guests shall receive the same meals and lodging as conference attendees, free of charge.

All other costs for speakers (speaker/presenter fee, meals and accommodations while in transit, incidentals, etc.) shall be negotiated and approved prior to the conference by the Planner or designee. A written agreement should be executed to describe services, fees, and expectations from speaker/presenter.

All costs shall be itemized on an invoice and sent to the Planner for reimbursement after the conference unless specified otherwise in a written agreement.

## **Article VI Exhibitors/Sponsors/Vendors**

### **Section 1 Conference Registration**

Perhaps nothing is more important than communicating effectively with your potential exhibitors/sponsors/vendors. With this mind, your registration packets for them should be a treasure trove of information. Clearly describe what amenities are included with a vendor booth, and what items require additional costs. Make sure you note details such as booth dimensions, table size, and the accessibility of electric and internet sources. You'll also want to include a place on your registration form where exhibitors can opt to pay for additional attendees and audio/visual requirements.

The registration fee for the exhibitors/sponsors/vendors should be set within sponsorship levels. These fees help offset conference expenses and should include access to the same meals and room rates as the Association attendees. Hotel rooms at the conference rate are available only to paying vendor attendees.

When vendors arrive, make sure a designated individual/committee member is available to meet them and make them aware of their allotted display space at the conference. Requested chairs, tables, electric connections, booths, pipe, and drapes must be worked out in advance and available when vendors arrive.

Vendors should be listed in the conference registration list and should receive a registration packet similar to the attendee packet.

The vendor area, tables, and equipment needs should be negotiated in the hotel contract and associated fees should be waived if possible.

### **Section 2 Exhibitor Area**

The importance of traffic and visibility for an exhibitor booth is paramount with vendors. Regardless of how smooth registration and check-in goes, there will be some exhibitors who will complain about their booth position. One way to protect yourself here is to correlate your booth pricing to traffic patterns. In other words, the best positions for traffic should cost more than the others. Reinforce this policy with a booth map that illustrates the projected traffic flow. Using this approach will eliminate a lot of the complaints you get during setup.

Always schedule a setup day in advance of the conference. Reserving an additional day of space may cost you more in room rental fees, but the amount of headaches it will save you is well worth the price. First off, if your conference begins in the morning then you really have no other option. The hotel needs adequate notice for setup to get all of the tables and booths in place. The bottom line is that everyone will benefit from having an extra day to get organized before the conference starts.

Managing incoming and outgoing exhibition packages can be a real nightmare if you don't have a system in place. The vendor registration packet should contain accurate information about all of the shipping options for vendors. Obtain the hotel policies for shipping of items pre-conference and communicate all of their rules and regulations to the vendors.

Nothing is more reassuring than a dedicated person when issues arise with vendors. For this reason you should have one support person available for every 50 registered vendors. Keeping a support person accessible to vendors will prevent small problems from turning into bigger ones. Don't be surprised when a vendor decides the accommodations they ordered in advance are not what they expected. This is where your support person can jump into action and track down the additional items that the vendor needs.

The best approach to managing vendors is to create a system for them to identify and organize their booth space. It might sound contradicting to customer service standards, but forcing them to be responsible for their own needs will get you the information required to run a successful conference. Of course there will always be those vendors who insist on playing outside of the rules. This is expected and a lot more manageable when you have a defined set of written guidelines that you can have available for vendors at their booths.

### **Section 3 Vendor User Groups**

The Planner shall work closely with vendors to provide room needs for user group meetings such as space, A/V needs, room setup, ordering food and beverages, etc.

Fees for vendor user group meetings, such as room rental fees, equipment needs, and any additional costs, are the responsibility of the vendor and may be included as part of a sponsorship package.

## Section 4 Vendor Sponsorship Examples

It is good business practice to structure vendor “sponsorships” for WSACA-sponsored events to offset the costs of conferences and events, as well as, provide a funding mechanism for future educational training opportunities. The following sponsorship levels have been developed as a guide to promote and enhance WSACA-sponsored conferences and assure that vendors are treated in a fair and equitable manner.

### ***Platinum Sponsor \$3,000***

As a platinum level sponsor of this event, you’ll receive -

- Prime location for your exhibitor booth w/ power (110V)
- Recognition on conference materials
- Recognition at the Vendor Reception
- Ads and Recognition on our conference mobile application
- Platinum exclusive push notification to all attendees from our mobile application
- Opportunity to include brochure with attendee materials
- Present a raffle prize to attendees
- Hotel rooms at conference rate (while available)
- 3 conference registrations. Registration includes meals and opportunity to attend conference sessions

### ***Gold Sponsor \$2,000***

As a gold level sponsor of this event, you’ll receive -

- Prime location for your exhibitor booth w/ power (110V)
- Recognition on conference materials
- Recognition at the Vendor Reception
- Ads and Recognition on our conference mobile application
- Present a raffle prize to attendees
- Hotel rooms at conference rate (while available)
- 2 conference registrations. Registration includes meals and opportunity to attend conference sessions

### ***Silver Sponsor \$1,500***

As a silver level sponsor of this event, you’ll receive -

- An exhibitor booth w/ power (110V)
- Recognition on conference materials
- Recognition at the Vendor Reception
- Present a raffle prize to attendees
- Hotel rooms at conference rate (while available)
- 2 conference registrations. Registration includes meals and opportunity to attend conference sessions

Other examples may include hotel room card sponsors, lanyard and ID badge sponsors, and portfolio

## **Article VII Signage**

### **Section 1 Vital Role of Good Signage**

Conference planners understand the vital role that good signage plays in getting attendees to and from meeting rooms. That being said, planning an effective signage strategy is rarely as simple as creating a handful of directional foam board displays. Whenever you have dozens of people congregating inside an unfamiliar area, you should assume there will be exceptions to even the best traffic funnels.

### **Section 2 Make Your Signs Stand Out**

A common gripe for planners is the lack of prevalent signage provided by hotels and conference centers. The simplest way to get past this is to take responsibility of all the signage needs. Of course it makes sense to take inventory of the in-house options available, but don't forget that you might have to share some of these resources with other events on the property. Branded signs that stand apart from the subtle venue signage are much more distinguishable for your guests. People tend to walk right past house signage, so make sure your brand or logo is clearly displayed to attract attention.

### **Section 3 Get Your Guests to the Front Door**

Don't wait for attendees to enter the property before you begin directing them. Entrance and parking signs are critical for making sure attendees park and enter the building at the right spot. Trust me; you don't want to be the person greeting a registrant who has just walked a half-mile because they parked on the wrong side of the building! A good signage strategy begins at the first place a guest will land on the property grounds.

Never underestimate the power of human interaction. No matter how eye-catching your signs might seem to you, they can never replace the value of a friendly face. Greeters will always be the best defense against lost and irritated attendees. A strategically-placed registration table will alleviate some of the need for staffing, but make sure you walk through the venue property and identify locations where your guests could potentially get lost.



## Article VIII Scholarships

### Section 1 Scholarship Policy

(Taken from WSACA Standard Operating Policies and Procedures.)

The Association may...

- Waive event registration
- Reimburse event registration

....for its members and / or their county staff. Scholarships are awarded when they enable event attendance that otherwise wouldn't be possible.

1. The WSACA Executive Board will include scholarships in the Association's Annual Budget.
2. Scholarships may be used in conjunction with travel reimbursement, if so approved.
3. Scholarships will be limited to one person per county to attend a WSACA-sponsored conference or meeting.
4. Scholarships must be pre-approved, at least seven (7) days in advance, by the Conference Chair, if the event is a WSACA Conference. For events other than a WSACA Conference, approval will come from the Association President, using the WSACA Expense Request Form.
5. The amount of financial assistance will be the minimum necessary to facilitate attendance.
6. Scholarships will be used primarily for registration and lodging. As much as possible, complimentary rooms awarded in conference site contracts will be used to offset lodging expenses for scholarship recipients.
7. Scholarships may not be used to supplant available county funds.

### Section 2 Scholarship Procedure

1. Association members may apply for a scholarship for themselves or their designated staff member, using the WSACA Expense Form.
2. If the scholarship will be applied to an Association statewide conference, the Chair of the responsible committee will approve or deny the request, based on the approved conference budget.
3. If the scholarship pertains to a meeting / event other than a WSACA Conference, the Association President will approve or deny the request.

## **Article IX Budget**

### **Section 1 Budget vs Costs**

It might sound impractical to work on a budget before knowing venue and catering costs, but working this way provides a benchmark for you to measure all of vendor proposals. Begin with your revenue sources. How much should you charge for attendance? Will you call on sponsors to help offset costs? What will exhibitors pay to participate? Revenues will ultimately dictate your budget, so it only makes sense to project them first.

### **Section 2 Conference Budget**

Conference budgets are submitted annually and approved by the Association at the Annual Conference.

Once a hotel has been contracted and prices for services have been determined, a conference budget should be created to use as a guide for formalizing the conference registration fee. The budget should factor in all anticipated costs including but not limited to:

- Audio/visual/technical equipment.
- Meeting room fees and any wireless internet charges.
- Food and beverage charges, including tax and gratuity.
- Vendor exhibit area fees (including tables, chairs, pipe, drapes, and electrical).
- Attendee name badges and/or lanyards and other conference supplies.
- Printing charges for conference agendas, registration materials, speaker/trainer materials, and table-tents.
- Speaker fees and travel costs.
- Miscellaneous conference decorations and entertainment.

Once all fees and expenses are estimated and totaled, a conference registration fee may be determined.

The Planner is encouraged to identify and contact sponsors for the conference. Any additional monies raised should be used to offset conference expenses and provide for future educational training opportunities.

At the close of the conference, the Planner should review the tentative charges with the hotel staff to ensure that the negotiated costs have been maintained. Best practice is to receive an itemized bill payable within 30 days following the conference. All conference invoices should be sent to the Association Treasurer for processing and payment.

### **Section 3 Pre-Conference Cost Reimbursements**

Negotiate additional hotel rooms with the conference hotel for pre-planning site visits free of charge if possible.

Conference budgets may include travel reimbursements associated with pre-conference planning.

## **Article X Conference Agenda**

The Planner may designate committee members to assist with the conference agenda. Some things to consider are:

- Establish a set time for conference registration and ensure that the registration table is properly staffed.
- Arrange for opening ceremonies of the conference such as an American Flag for the Pledge of Allegiance. American Flags are available at most hotels and should be placed on stage accordingly.
- Posting of Colors by a local honor guard or singing of the National Anthem is preferable but present one only. The pledge of allegiance, singing the national anthem, and posting colors should never be done together per rules of conduct.
- Arrange for a special presenter or local elected official for welcoming comments during opening ceremonies.
- Research and schedule speakers and educators for breakout sessions and group sessions.
- If there is a fee charged by a speaker, an agreement should be executed and fees determined in advance of the event.
- Speaker fees should be figured into the conference budget and accounted for in the registration fee.
- All biographical information and handouts should be prepared before the session begins and printed in conference material.
- Determine specific break times in which conference attendees can visit with vendors and schedule 30 minutes if available.
- Keep the Association informed as you plan.

## **Article XI Meals**

### **Section 1 Meal Costs**

The Planner should meet with the hotel representative regarding proposed meal plans for the conference and costs associated with them. Provide the hotel with a copy of the conference program. Keep in mind that catering will be the most significant cost and should be accounted for in the conference registration fee.

Efforts should be made to get vendor sponsorships to help offset the costs of meals, receptions, and breaks. Appropriate recognition of any sponsorship should be made, verbally and printed in conference materials.

## Section 2 Meals Included

The Planner shall work with Committee Members to determine which meals are included. Factors to consider may be hotel cost and the availability of vendor sponsorship. Preferred meals are:

- Breakfast - each day of conference.
- Lunch - each day of conference.
- Breaks - number provided varies depending on cost and sponsorship.
- Dinner - number provided varies depending on cost and sponsorship.

Ask for dietary restrictions in the conference registration process. Dietary needs must be tracked and communicated to the hotel catering staff.

## Article XII Suggested Print Materials

Suggested printed materials include:

1. Agenda.
2. Table tents.
3. Biographical information on speakers, presenters, etc.
4. Various miscellaneous documents such as maps, location of shopping areas, and area restaurants usually obtained by the hotel, the local Visitor's Bureau, and/or the local Chamber of Commerce.
5. Letter of Request to potential sponsors (see attached sample).
6. Thank You Letter for all sponsors (see attached sample).
7. Name badges for attendees, vendors, speakers, educators, and guests.
8. Conference evaluation form (optional; every attempt should be made to create a survey to evaluate conference electronically).

## **Article XIII Before the Conference**

The Planner sets the pace and flow of the conference. This is an intangible but vital part of the success of any conference. Well-planned transitions keep attendees focused.

The Planner should develop a detailed timeline for conference flow that includes written scripts and time allotments for introductions and transitions, as well as equipment changes.

Run through a conference before it begins. Will there be awkward transitions? Will it feel rushed and cramped at points? Will it drag? A rehearsal is suggested to identify any needed adjustments. After careful planning, rehearsal, and attention to the pace and flow of the conference, the Planner may still need to make on the spot adjustments due to unforeseen developments. The goal is that the group will not be time-conscious or distracted by the pace of the meeting.

## **Article XIV After the Conference**

The Planner is responsible for forwarding all invoices to the Association Treasurer for payment. W-9's must be collected in order to issue payment for contractors and speakers.

The Planner or designee should prepare thank you correspondence for speakers, vendors, sponsors, and committee members.

The Planner may choose to create and send a post-conference survey to all attendees. Data received from this survey shall be shared with the Association or other conference planners for future conference planning.

## Article XV Event Planning Checklist

24 - 12 mos.	Use Conference Direct to select location and sign contract with conference venue
12 mos.	Establish conference Planner and committee members
	Inform Association of date/location
10-11 mos.	Start creating conference agenda
	Keep conference hotel apprised of plans and changes
	Schedule/contract presenters, tours, transportation, food, etc.
	Start a conference budget
	Identify and obtain sponsors to assist with financing
7 - 8 mos.	Registration cancellation policy
	Establish conference budget
	Set up bank account and a committee member as treasurer
	Begin set up of registration process
5 - 6 mos.	Host County select a presenter for welcoming ceremonies
	Select a group for presentation of colors, singing of anthem, or other intro to conference
	Save the date sent to Association Members, other stakeholders, and vendors if applicable
	Preliminary menu
3 - 4 mos.	Conference draft agenda
	Conference agenda posted on Association website
	Registration link sent (electronically) to potential conference attendees
	Check periodically with hotel regarding rooming list
	Organize speaker/presenter room accommodations
	Set aside and reserve comp rooms for speakers, presenters, etc.
1 - 2 mos.	Create a registration database to track and compare rooming list with treasurer
	Finalize conference agenda
	Confirm conference agenda with hotel
	Develop attendee registration packets
	Obtain hotel estimate based on number attending
1 mo.	Finalize and print conference material such as Agenda and table-tents
	Send "What to Expect" communications
Conference	Hold successful conference!
	Submit any unpaid invoices to the Association treasurer
	Send "thank yous" as appropriate
	Send post-conference survey

## Article XVI Sample Documents

### Sample Letter of Request

Vendor name  
Vendor address line 1  
Vendor address line 2

Dear Vendor:

The Washington State Association of County Auditors is honored to be conducting the annual conference in Seattle, Washington. The Conference will commence on Monday, June 8, 2015 and conclude around noon on Friday, June 12th. A complete registration packet is available at: [www.wsaca.org](http://www.wsaca.org).

Vendor has graciously hosted (reception, breaks, raffle item, etc.) in prior years and I am hopeful that you would be willing to continue that tradition this year. The planning committee will be meeting with hotel staff in the near future to determine the reception menu and associated costs. I look forward to your favorable response to this request in the near future.

Sincerely,

Planner

### Sample Thank You for Agreeing to Host Letter

Dear Vendor:

Thank you for committing to host the reception dinner at the 2015 Conference, to be held on June 8 - 12, 2015. The conference will be held at the DoubleTree Hilton Hotel, Seattle, Washington. Directions and a hotel brochure are enclosed for your convenience.

Attached you will find a conference agenda. Please login in to: [www.wsaca.org](http://www.wsaca.org) to register no later than Friday, May 15, 2015. A vendor table will be provided for you at the conference. Please feel free to contact me if you have any questions. I look forward to seeing you in June.

Sincerely,

Planner