

# CONFERENCE NOTES

Template

# NCSFA

*Josie Sharp*  
*PA Conference Host*  
[Josie728@verizon.net](mailto:Josie728@verizon.net)

# Table of Contents

Future NCSFA Host States .....	4
Topics include: .....	4
Audio/visual Requirements .....	5
Banquet/Awards Night .....	5
Book-It Program .....	6
Budget .....	6
Conference – General Notes .....	7
Contact List .....	7
Exhibit Fair/Trade Show .....	7
• Game for attendees.....	7
Food/Menu Planning .....	9
Sample the food.....	9
Games .....	9
Gifts.....	10
Golf.....	11
Non-Golf Activity .....	11
Guest Program.....	11
Transportation .....	12
Venues .....	12
Feedback from the participants .....	12
Suggestions .....	12
Hospitality Suites .....	12
Some things we learned: .....	12
Invoice processing.....	13
License Plates .....	13
Moderators.....	13
Off-site Activity .....	14
Things to consider for the off-site activity: .....	14
Planning .....	15
It will all pay off by conference time. ....	15
Printing .....	15

Program.....	16
Program Books .....	17
Registration.....	18
Registration Desk/Storage Area.....	18
Signage .....	19
Exhibit Fair Signs .....	19
Sponsor Signs .....	19
Event Signs.....	19
Guest Program Signs.....	19
Hotel Signs.....	19
Host Staff .....	19
Speakers .....	20
Sponsorship.....	21
Tee-Shirt Swap .....	21
Rules.....	21
Room for the event.....	21
Transportation .....	21
Airport shuttle service.....	21
Rental cars.....	22
Vendor Reception .....	22
Venue Selection.....	22
Volunteers.....	23

## **Future NCSFA Host States**

This compilation of my experiences, thoughts, etc. is meant to share details, issues, concerns, successes and suggestions with you in order to help prepare for future conferences by benefiting from the Hershey conference experience.

Use what you like, ignore what don't like or won't work for you and enjoy the planning and the entire process of developing an NCSFA conference. Be flexible, calm and go with the flow of events. Nothing is monumental to change or fix.

The NCSFA Executive Director and the Corporate Liaison will be extremely helpful during the planning and execution of this conference.

### ***Topics include:***

- Audio/visual requirements
- Banquet/awards night
- Book-It program
- Budget
- Conference general notes
- Contact list
- Exhibit fair/trade show
- Food/menu planning
- Games
- Gifts
- Golf and non-golf activity
- Guest program
- Hospitality suites
- Invoice processing
- License plates
- Menu planning
- Off-site activity
- Planning
- Printing
- Program
- Program books
- Registration
- Registration desk/storage area
- Rental car/s
- Signage
- Speakers
- Tee-shirt swap
- Transportation
- Vendor reception
- Venue selection
- Volunteers
- Venue selection
- Volunteers

## Audio/visual Requirements

- Anticipate your needs in advance
- Understand the cost of all A/V equipment
- Bring your own if you can (Projectors can cost \$400/day from hotel.)
- Wireless microphones are handy and practical to have for speakers.
- A podium, microphone and screen are needed for almost all sessions
- If there is a lunchtime presentation in a different room, ask if the equipment can be moved (twice) and avoid double equipment rental charges. Hotels may not permit this or may charge as much to move the equipment as they charge for the rental fee.
- NCSFA pays for all A/V equipment used in the educational sessions.
- A/V equipment used by vendors in the exhibit hall are arranged for and paid for by exhibitors.
- If NCSFA has mini-learning sessions for attendees during the Trade Show, NCSFA is responsible for the scheduling and rental of equipment.
- The information that is sent to speakers asks for A/V needs, and this will help greatly to organize A/V needs.
- Using the same room for the entire day may reduce the cost of A/V equipment.
- Confirm availability of an on-site technical person who can respond immediately should any AV equipment fail to operate correctly.

## Banquet/Awards Night

- Audio requirements include: podium, microphone
- Be prepared to adjust -
- This is a relaxing evening, but people are also celebrating a rewarding conference experience. The reception this year was scheduled from 6-7 and that would have worked fine if we did not have more people attend than we planned. Dinner was delayed for 15-20 minutes to give maintenance and the wait staff enough time to set up, and the kitchen had to prepare additional salads and entrees. The awards took a little more time than planned, and both of these changes made the band start playing later than scheduled.
- Music:
  - Reception music – should be quality, background music so that people can speak without shouting.
  - Rock 'n Roll Band – Music was a great way to end the week and the evening, but with early flights, many people did not stay. Even though the band was excellent, not many people stayed to listen or dance to the music. However, it was a lot of fun for those who did. You may want to consider the cost and entertainment value for the group.
- It is a good idea for the Executive Director to present the awards to the Board – that way, no one is giving an award to him/herself as would happen if the President, Past President or President Elect had this responsibility.
- Trying to keep the awards and President's message to 30 minutes is highly recommended.

## **Book-It Program**

- This program was highly successful both in Savannah and Hershey. We learned from the Savannah experience and improved it the second year.
- NCSFA solicited corporate sponsorship, and Voyager stepped up to the plate in 2006 and 2007; they have already committed to do the same for 2008.
- With Voyager's sponsorship funds of \$3,000 and the chosen school's list, Borders Book Store was approached. They offered a 25% discount and we spent all of the funds and managed to purchase almost \$4,000 worth of books.
- By next year, we will be a registered not-for-profit group with Borders and will continue to receive a 25% discount.
- I requested that Borders consider a "Book Registry" program, and this request has been submitted to their corporate headquarters. My hope is that in the future we will be able to post the school's book list on Borders site, and meeting attendees, as well as those who don't attend, but would like to participate, will be able to order books and pay for them online. All books will be at the local Borders store, and they would deliver to the conference site. How much easier can it get?! Even if the host state has to pick them up, we could probably live with that.
- Inviting a representative from the school to attend the conference and accept the books is not only a nice thing to do, but it should be mandatory. The history of the school by the superintendent was heartfelt and impressive. His comments made all of us glad that we contributed to such a worthy cause and to a school that is in such desperate need for books.
- We displayed all of the books on a table on stage and covered them in advance of the presentation. I wish I would have thought to distribute the books on the tables in the room, around the floor of the stage and on the tables in the back of the room. We could have asked each attendee to collect books and bring them forward during the presentation. Perhaps a unique way to make the presentation would add to the excitement for the program.

## **Budget**

- The conference budget has been challenging; however, with two consecutive years of good data, this should be easier than in the past.
- Inviting speakers who do not charge is a terrific way to save money. NCSFA provides one night's lodging and appropriate meals, depending on arrival and departure dates. Making sure that these details are given to the speakers is important, and confirming with them that NCSFA will pay for meals as part of the conference meals is necessary and a good way to control costs. If speakers decide to enjoy meals on their own, it is at their expense, unless NCSFA decides otherwise. Then a cap should be placed on meals.
- If NCSFA pays airfare, it might be beneficial for NCSFA or a host state representative to make the arrangements with the speaker's input to ensure cost effectiveness. Class should always be coach, unless NCSFA agrees to any upgrades.
- With the availability of data, the Executive Director should be able to supply categories of spend and amounts spent in each to provide guidance for the upcoming conference.

## Conference – General Notes

- If any vendors and/or corporate members wish to invite conference attendees for dinner or any other activity during the conference, I would strongly recommend that NCSFA establish a policy of not distributing invitations and/or handling details of the event. Suggesting that they contact the concierge or the hotel's conference contact person would be a good solution.
- Website –
  - Try to make a minimal number of changes
  - List information once and link to that site; if information is placed in several different places and/or files and not changed in every place, it is very confusing to those looking for conference information.
  - NCSFA should be the owner of the site.
  - The site should be re-designed. The tabs should link to the subject information and not directly to a registration form. The registration can be on a separate tab or within the information on the subject page.
  - Finding information should take seconds. (Numerous people called me because they became frustrated looking for information, and sometimes it took me quite a while to find it also.)
- Prior to the conference (perhaps with registration) asking for each attendee's session and event choices (including guests) will help to plan better. This was done for the first time in 2007, and it was not highly successful, but it was also done about a month prior to the conference. If there is a way to maintain registrations electronically so that the attendees can access their own records and make changes from the date of registration until a deadline date, it might help to improve the responses.

## Contact List

The best words of advice that I can give you is to maintain a contact list for the conference beginning with that first phone call or email message, and include the name, contact information and cost details for **everyone** you speak to and contact for all supporting services, tours, transportation, speakers, etc. - EVERYONE. This will prove to be invaluable as it gets closer to the conference. Changes sometimes must be made at the last minute or a substitute bus company is needed. During the week of the conference, you will need this list to contact hotel representatives, volunteers, etc. and it will help to maintain your sanity when all of this information is at your fingertips. I maintained a spreadsheet with all of my data, and not only did I print several copies, but I put the file on a jump drive and kept it in my briefcase.

## Exhibit Fair/Trade Show

There were a number of things that improved the 2007 trade show and contributed to its success.

- **Game for attendees.** The game was for fleet managers only which promoted booth traffic and added fun to the trade show.
- Having one or two booths available on only one of the two days requires fleet managers to participate in the trade show on both days. This should not be openly advertised.

- Having dinner in the center of the trade show was highly successful, gave an appreciation of the total number of people in attendance and afforded opportunities for exhibitors to get extra, relaxed face time with attendees.
- Inviting vendors to participate in the prize drawings added to the fun for them; however, in doing this, it is a good idea to display all prizes on a table and letting winners pick their prize instead of choosing for them. Vendors may not want a competitor's item. Prizes don't have to be expensive, and most prizes are going to be donated by the vendors. Their enthusiasm is contagious.
- Vendors are very generous in contributing prizes, and the host state team can choose which items are included in each drawing throughout the conference.
- Having breakfast in the exhibit fair on day #2 was another good way to garner booth traffic.
- Day #2 also had two caricaturists to amuse and delight the attendees—both vendors and fleet managers. Having a fun activity within the exhibit fair is a great way to bring attendees back.
- The vendor reception really needs to be heavily advertised in advance. A number of exhibitors did not stay because they were not aware of the reception even though we advertised it.
- Flyers reminding exhibitors of the vendor reception were hand delivered on day #2, and this proved to be effective. This was a last-minute effort this year, but these flyers can easily be printed prior to the conference.
- Fleet infomercials/educational sessions should
  - Be in a viable location that easy to find
  - Be somewhat closed off to allow for a speaker and audience participation without distracting surrounding exhibitors
  - Have signage to find the location
    - NCSFA can be instrumental in helping vendors to make their sessions successful.
  - Have a post-presentation area for the speakers to continue to answer questions while the next presentation is in session.
- This might be difficult to do, but a large layout of the exhibit fair at the entrance to the exhibit hall would help attendees find booths.
- NCSFA staff (perhaps Executive Director) should make announcements as a reminder throughout the exhibit alerting the attendees of the next presentation.
- Every member of the Board and the state host team should make an effort to thank every exhibitor and ask them to return the following year. The corporate liaison visited each booth and thanked them for exhibiting and reminded them to complete the exhibit survey form. This resulted in a response rate of >50%.
- Just prior to the end of the second day, hand delivering a thank you note to each exhibitor from NCSFA would be a very nice gesture. If you can, add a little trinket such as a Hershey bar or equivalent.
- Identifying the primary booth contacts is helpful with registration, contacts and any other special promotions and needs.
- The signs stating "We are a proud member/sponsor of NCSFA" were a bit hit, and I suggest we continue this practice. The corporate liaison committee helped distribute these signs as well as the game cards, to each booth.
- As exhibitors register, include in the master file, the designations of a sponsor, a member or a first-time exhibitor.

- The exhibit booth layout and setup are very challenging. It is important to have the drayage company on-site at all times during setup and tear-down. (For future conferences you may want to explore if having someone from the convention service department onsite is available.
- Do not change booth layout and assignments once assigned. Booths are selected based on location and/or availability.

## **Food/Menu Planning**

### **Sample the food**

It is a good idea to sample the food at the conference location during the selection of the venue. Note quantity and quality. Do not hesitate to ask for items that are not on the standard conference menu, but are available at the same cost. Some of the changes we made this year that proved successful were:

- Varying the entire menu as much as possible. Choose not only different entrees, but different salads and desserts. The re-run of Signature dishes usually works, but having the same salad for every meal does not.
- Choosing a light lunch on days when dinner is a buffet; conversely, if lunch is a buffet, choose a lighter dinner.
- To avoid jokes and groans, try not to choose chicken too many times.
- Vary between buffets and served meals whether it is breakfast, lunch or dinner.
- Buffets seem to work well during the exhibit fair.
- Breakfast buffets work better towards the end of the conference.
- Served meals are best if there is a speaker during the meal.
- Ask for any special dietary requirements.
- Breaks
  - Snacks for the breaks can be very costly. This year we chose to have beverages only, and it seemed to be sufficient.
  - Beverages
    - Check with the hotel on the difference between the per person cost and cost by consumption. Generally, consumption will be less expensive.
  - Placement of beverages and snacks, if any.
    - Try to have beverages placed inside the meeting room in order to maintain costs, especially if the consumption method is chosen.

## **Games**

The 2007 conference had numerous games, and this was a new experiment. Some people enjoy it and others did not participate. However, when the non-participants saw the prizes, they wished they participated. The 2007 games and prizes were:

- Trivia games for each month beginning almost a year in advance. The questions increased in number and difficulty each month and ended in a crossword puzzle.
- Exhibit fair game. One card was issued for each participating vendor. Obviously, those vendors who register a few days before the conference risk not being included. The 2007 cards were chocolate colored (light on one side and

- dark chocolate on the other). One side had the NCSFA logo and the vendor's logo, and the opposite side had a blurb taken from the vendor's website.
- Number all cards—front and back--, and number them sequentially, (perhaps in order of submission) but not with matching booth numbers. Last-minute changes are frequently made with booth numbers, and they may not match what was printed. This also creates more of a challenge for the attendees—and a sense of accomplishment and fun when finding a particular vendor.
  - NCSFA pays for the printing of the cards.
  - Just prior to the opening of the exhibit fair, a packet of 100 cards was given to each exhibitor for handing out to fleet managers. In 2007 the cards were distributed by the corporate liaison committee along with the exhibit member/sponsor signs, and this worked very well.
- Some suggestions are:
    - The host team should decide in advance on the prizes and advertise on the website. Decide in advance if you will have alternate, 2<sup>nd</sup> or 3<sup>rd</sup> place prizes. It may be challenging to have dozens of prizes.
    - Do not make changes to the prizes once advertised. Sometimes changes can double the cost.
    - If you do a crossword puzzle, someone needs to check the results because the prize should be for the first submission of the correct answers, not just the first submission.
    - The exhibit fair game was highly successful. If this were to be repeated in future years, we learned that permission is required from the company to use the logo. My suggestion is to ask the vendor for the logo and the information that they want to have printed on the back side of the card. You may want to provide a checklist which would include the company logo, the corporate website, contact information of the representative/s at the booths and a 50-75 word advertising blurb. Many fleet managers asked for their cards to be returned after the winner was announced. This creates another suggestion. Punching holes in a corner of the cards and providing a ring for the collected cards would be useful and would provide fleet managers with a great resource.

## **Gifts**

Gifts are chosen by the state host team and are paid for by NCSFA. Gifts are needed for the following:

- Speakers (all should be same)
- NCSFA Board
- Special awards – Honda Award, NCSFA Award, etc.
- Volunteers
- Special recognitions

The Executive Director can supply costs for awards for the past two years to give guidance to the current host team.

Some suggestions are:

- Order at least 2 extra speaker gifts. A speaker may invite someone to share the presentation and may or may not notify you. Each person should receive an NCSFA thank you gift.
- You may also want to order 3-5 extra volunteer gifts. These gifts typically are reasonably priced and could be used for someone who has helped during the conference and/or provided extraordinary customer service. If there are extras, they can be used in a raffle on the last day of the conference.

## **Golf**

- Try to choose a course nearby and a course that people may not ordinarily have the opportunity to play.
- I would highly recommend that the golf outing be held on a weekday rather than a weekend to encourage greater participation.
- Invite vendors to support the activity by sponsoring a hole or the overall tournament.
- Generally, sponsors are indifferent as to which hole they sponsor, but it would be prudent to have a sponsor's name attached to one of the holes that have a contest with it.
- Prizes typically are closest to the pin, longest drive and hole-in-one.
- Prizes should be for men and women in each category.
- Golf courses typically tally the scores for the tournament.
- Golf courses also may contribute to the tournament in the form of gift certificates for the pro shop, and you will want to ask when planning the event.
- If the event is large enough, you may want to use an organization to plan the prizes. The Hershey event was small so I did not use them, but they are reputable, flexible and have an assortment of programs to work with. This company is:
  - Tournament Pros
  - 1-800-790-4653
  - [www.tournamentpros.com](http://www.tournamentpros.com)

## **Non-Golf Activity**

- Try to have an activity for non-golfers. Not everyone wants to play golf, and having an activity for non-golfers and guests immediately makes everyone feel part of the group. At Hershey this was easy to do because the non-golf activity was Hershey Park, and Hershey Lodge provided complimentary transportation to/from the park and heavily discounted tickets to the park.

## **Guest Program**

The 2007 venues for the guest program were terrific; however the program was challenging and participation was disappointing. The registration numbers confirmed 31 registered guests, but we had the following number participate in the guest program each day. We also had fleet managers who went on the guest program (of course, they did not register).

Monday –22            Tuesday – 17            Wednesday – 19            Friday - 13

## **Transportation**

- The difficulty and expense was hiring buses. We could have used 28 passenger buses, but with having 31 registered guests, we had to bump up to the next size which was a 46-passenger bus at twice the cost. When the registered guests did not participate in the activity, it became costly for NCSFA.

## **Venues**

- The same challenges were experienced with the venues. We were required to purchase tickets in advance for one of the venues, and we purchased 28 tickets; 19 people participated.

## **Feedback from the participants**

- They really appreciated everything they did and everything they saw.
- They would have liked more downtime, but they did not want to sacrifice the activities.
- Provide water and trash bags on the bus.
- Have someone from NCSFA accompany them on their trips.
- They like to have a person in charge to make decisions and make sure they get to where they need to be.
- Provide more information upfront as to the scheduled activities.

## **Suggestions**

- Prior to the conference (perhaps as part of the registration form) ask the guests to choose the activities in which they plan to participate.
- Send a confirmation and reminders listing those activities and ask them to notify NCSFA of any changes. Perhaps this can be made electronic.
- A suggestion from the 2008 host team – provide the estimated cost of the guest program on the program information. Sometimes people do not know how costly the program is and may have a greater sense of commitment to participate.
- Try to have a consistent meeting place for every activity.
- Include a map of the premises with their meeting place highlighted.
- Provide a bag for their materials (does not have to be expensive)
- Ask about special needs of the participants, i.e. wheel chair, etc.
- Schedule morning and afternoon sessions instead of all-day sessions.

## **Hospitality Suites**

### ***Some things we learned:***

- 11 p.m. (midnight at the latest) is a good time to close the hospitality suites.
- Having the hospitality suite in a function room at the hotel rather than a guest suite proved to be great. The room and the bar closed at the appointed time. If it were a guest room, the occupant may have difficulty in getting people to leave and getting sleep.

- Having a bartender supplied by the hotel does much for liability for the hotel and NCSFA.
- The liquor does not have to be top-shelf.
- Serving only beer and wine some of the time may be an option; the off-site activity may be a good time to do this. If chosen too frequently, it would not be a popular choice.
- Having only snacks – chips, pretzels, nuts – at the hospitality suites is sufficient. Fruit and desserts are too much and are wasted.
- Be aware of state laws and the hotel’s policy.
  - Pennsylvania state law requires that some type of food be served if alcohol is being served; other states may have similar laws.
  - Some hotels permit bringing your own alcohol onto the premises; others do not for liability reasons.

## **Invoice processing**

Try to have as much billed directly to Mercury Associates as possible. Notify Mercury of impending charges.

If the host team pays for anything, for prompt reimbursement, be sure to retain receipts and submit copies with your list of expenses. If there are many items on the list, it is beneficial to create a spreadsheet listing the following:

- Date of expense
- Type of expense
- Amount
- Company name
- Details of purchase

Make sure Mercury, the Executive Director and the conference host review all of the charges made to the master account.

## **License Plates**

It has become a tradition to provide each conference attendee with a license plate for the State in which the conference is held. There are three options to provide these plates.

1. The Host Team may ask their DOT to provide the plates complimentary to NCSFA. (Plates will be labeled as “samples” or “not valid”.)
2. The Host Team may ask their DOT to provide the plates at a cost that covers production of the plates. Typically, this cost is approximately \$1.50.
3. The Host Team may order these from a company that makes license plates for conferences. Depending on the choice of materials, these could cost @ \$1.00 each.

## **Moderators**

Each speaker needs a moderator for an introduction, wrap-up, thank you and gift presentation. This is a great way to use the talents of the NCSFA Board members, and it gives the members an opportunity to be visible to the conference attendees

Ideally, all scripts should be prepared in advance for both the introduction and the wrap-up.

At least 45 days prior to the conference, the Host Team should provide moderators with the photo and bio of the speaker that will be introduced.

Some of the responsibilities of moderators are:

- Contact the speaker at least 30 days prior to conference and introduce him/herself
- If possible, be available to greet the speaker when he/she arrives at the hotel or the conference center.
- Check with the speaker 30-60 minutes prior to the presentation to see if anything is needed.
- Welcome attendees
- Ask everyone to either turn off cell phones or put them in a mute mode.
- Introduce the segment and provide several sentences about the topic; keeping the introduction to 1-3 minutes maintains everyone's attention. Do not read the speaker's entire biography to the audience; it will be provided in the notebook if anyone wants additional details.
- Introduce the speaker
- Help to maintain the schedule of the session. A couple of effective ways to do this are:
  - Prior to the session, let the speaker know that you will provide a silent signal to wrap-up @ 10 minutes before the end of the session and make sure you tell the speaker exactly what the signal is. You may need to send a second signal.
  - If necessary, approach the podium and help to wrap-up the session.
- Thank the speaker and try to find a meaningful part of the session to address comments and perhaps link a specific part of the presentation to a personal experience. The message that provides to the speaker is that you were listening and found the presentation important.
- Present the speaker with the NCSFA speaker gift.

## **Off-site Activity**

### ***Things to consider for the off-site activity:***

- Interest and value to the group; a unique experience is good.
- Choose something that can be fun as well as educational.
- Handicap access to all venues
- If outdoors, alternate plans if weather does not cooperate.
- If using buses, try to get as close to a definite number as possible, especially if it close to filling a bus/es. Having a few extra seats is not a problem, but not having enough may present not only transportation issues, but challenges with meals and entrance fees to venues.

- Some attendees indicated that it is difficult for them to justify off-site activities and suggested that future activities/tours be on the last day so that they can have the option of leaving once the business sessions are completed.

## Planning

*Plan*

Organize

*Plan some more*

Reorganize

*Continue planning*

Refine the organization

*Keep planning*

Tweak and organize

*Plan to be flexible*

Maintain sanity

### **It will all pay off by conference time.**

- Teams need direction from the conference host.
- Conference host needs to be in constant contact with the Executive Director and the Corporate Liaison. Monthly conference calls are sufficient in the beginning, but weekly conference calls starting about two months prior to the conference are extremely helpful.
- Each team needs a captain.
- Maintaining a timeline/GANT chart keeps everyone on board.
- Noting each person's responsibility on the chart or on a spreadsheet is helpful and everything can be seen at a glance.
- Some duties must be done at various times, and this ranges from days to weeks to months prior to the conference.
- Many hands will be needed for the following activities:
  - Make/compile the welcome gifts
  - Fill the guest bags
  - Fill the briefcases for attendees
- Organize all materials for easy distribution.
- If possible, include the host of the following year's conference. It will be helpful for planning and organizing.

## Printing

- It is extremely important to find a reliable printer, as well as one in close proximity to at least one person on the host team. There are many last-minute changes, and even though the material can be sent to the printer via email, the completed printing may have to be picked up. Draft copies will have to be approved, and seeing the finished product in person is advantageous.

- Try to get multiple quotes, especially for the larger and more expensive printing jobs. There could be an opportunity to save several hundred dollars in printing costs.
- Understand the costs if changes are made after approval is given to print or if additional copies are added to the original quote. This year we almost doubled the number of books that were printed.
- Changing from a 3-ring binder to the spiral-bound book for the program was a very positive change. It is lighter in weight, easier to handle and deletes the noise of opening the book during speaker presentations.
- Giving every attendee (except guests) a program book is a good idea. Originally, only one book was going to be given to each corporate attendee. That makes for a lot of confusion at registration; sometimes booth participants were located in different states and each wanted a copy.
- Another great idea and useful item was printing the tri-fold pocket program that fit into the name badge.
- If only a few pages, or a few dozen pages, are needed, it is best printed elsewhere; however, this may not be an option. Some organizations do not permit any non-State business printing.

## Program

- Developing a theme for your program is essential to begin early in the process, and developing that theme in your program, materials, bags/briefcases, badge holders, advertising, etc. will be fun and challenging.
- Having a mixture of speakers and topics is critical in maintaining interest and a smooth flow to the conference.
  - If a speaker is expected to present a lot of pertinent statistics and heavier content, try to schedule the next speaker one with a light topic or certainly one with a much different topic.
  - Attendees do not have a universal favorite topic or type of speaker; my favorite may be someone's least favorite. Having a variety is sure to envelope almost everyone's interests.
  - If you can avoid speakers who you know are difficult to work with, I would recommend that you do just that. It will make planning a lot easier. You will not change their behavior.
- Identifying the hot topics of the year and inviting speakers with expertise in those areas will bring the audience into the room.
- The Executive Director may survey the organization members to determine what would be of interest, and this becomes a good tool to build your program.
- If a vendor is making a presentation, having a fleet manager who uses the program/tool/resource greatly adds to the program.
- The audience is always highly interested in hearing from fleet managers; experiences with their peers are very meaningful.
- Allow @ 15 minutes at the end of every day for a wrap-up and drawings. Typically, this is done by the Executive Director, but there is no reason why the host state cannot do this.
- During the wrap-up, it would be beneficial to recap the sessions noting the learning experiences and listing the next day's sessions.

- A minor, but important note, at the beginning of the conference announce the location of the rest rooms, remind everyone to either turn off or mute cell phones. Introduce “go-to” people, i.e. Executive Director and host state team.
- The Speaker’s Bureau has an extensive list of speakers and a wide range of fees so if you are having difficulty in finding the right speaker, this may be a good resource.
- Attendees are interested in what other states are doing and having a high-level speaker from the host state can be an enlightening experience and provide information that attendees can share with people in their states.
- The Executive Director provided a great detailed program; it is lengthy so it is a good idea to provide a summary program in the notebook and a tri-fold schedule that fits in the badges.
- The breakout session at the end of the conference is always a good session, and 90 minutes should be the minimum time for it. Once the groups get started, they really have meaningful sessions. Moderators are important in making this session successful.
- The last day of the conference should be a lighter program day. Having a brief session to have the next year’s host state give a preview of the event is great.
- Conducting raffles at the end of each day with the requirement that you must be present to win is a great tool to keep attendees in the sessions.
- Gift card prizes are really appreciated and present no issues with getting through security at the airport. When choosing gift cards, it is important that they be accepted nationwide.
- This year we used gift cards that Mercury obtained from their bank, but we had issues with them. They required pin numbers and were confusing to the recipients; therefore, I would suggest that you purchase gift cards from places other than a bank. Choosing gift cards that have no expiration date is preferable to those that do, obviously. Purchasing cards just before the conference begins is advisable.
- Networking is a tremendous benefit of the conference. This year we scheduled 30 breaks between instead of 15. Fewer people were late for the next session and were more relaxed.
- Lastly, be flexible – then be more flexible. Deal with the situations quickly as they arise. Most of the time, attendees will not know when there is a glitch, and even if they do, it will not be a catastrophe. Sometimes, people will volunteer to help and feel better for contributing to the conference. Don’t hesitate to ask for help. There will be speaker changes, program changes, printing additions, and other unpredictable issues at the last minute. If you cannot have speakers who can present at a moment’s notice, the Executive Director can be prepared to fill in a session, at he did this year. The host state may also want to be prepared to do the same.

## **Program Books**

- Since you have a copy of the 2007 book, it will not be part of this document.
- The spiral-bound books worked well and better than the 3-ring binders. They weighed less, were easier to pack and avoided the noise of binders. It is

- easier for the host committee because the printer provides the finished product.
- We had a high success rate of getting speakers' presentations in advance when they knew that there would be no opportunity to add them on the day of their presentation.
    - One of the points I stressed to speakers is the fact that fleet managers retain these books as resource material and having their presentations and contact information in the books eliminates loss of the material and puts them a step ahead of their competitors.
    - Speakers do not appreciate the noise of everyone opening and closing binders while they are trying to present.
  - The dividers by day rather than by speaker were sufficient and saved money.
  - Choosing a clear plastic cover – front and back – is worth the cost.
  - Suggestions to add to the book:
    - List of guests
    - The guest program
    - Identify guests of fleet managers with the fleet managers (they don't always share the same last name)

## **Registration**

The registration form for exhibitors and, to some degree, attendees, needs to be updated and/or changed to clarify:

- Exhibit booth – list of what is included in booth registration
  - (one free registration)
- Additional booth personnel costs and a list of what is included
- Instructions for change in booth personnel
  - (this happens frequently)
- Attendee event participation selection
- Any items that need clarification

## **Registration Desk/Storage Area**

- Every hotel has a registration desk and storage area for conference events. It is amazing how much material can fit in a small space if they are organized.
- The hotel provides a specific number of keys for essential personnel for access to this area.
- Be sure to tell the hotel conference contact person that NCSFA people without keys are not permitted to enter this room.
  - We had an incident where one of our conference attendees asked security to open the door because a personal item had to be retrieved. We found several things missing the following day.
- Have enough people at the registration desk to be efficient.
- Have all materials organized and ready to distribute.
- Invite the next year's host to participate in this function – it will help to share the experience, provide valuable guidance and general information on what and how this process works.

## **Signage**

### ***Exhibit Fair Signs***

- It does not take a genius to calculate that the bigger the sign, the higher the cost.
- Try to limit the number of large signs.
- If the signs are easily moved, they can be displayed at various places during the conference.

### ***Sponsor Signs***

- Sponsors like to see their company logos/names posted for all to see. This is not a place to scrimp and choose a small sign. However, in addition to the large signs you may want to consider adding smaller ones. At another conference at Hershey, I saw small signs posted in many places. These signs were 8.5x11", had a heading of "Thanks to our Sweet Sponsors", had all of the company logos, were placed in plastic holders and displayed at the registration desk and various other places. It might be a way to advertise sponsors at a reasonable cost in a different format.

### ***Event Signs***

- If NCSFA continues to accept contributions per event, tabletop signs crediting the sponsor/s need to be prepared. These can be done by Mercury or the state host team – just keep each other in the loop to avoid duplication. Larger signs that can be placed on easels; they are easier to see and can be placed inside or outside the room. The large signs can be expensive so explore various printing options.

### ***Guest Program Signs***

- It would be helpful, especially on the first day of the guest program, to have directional signs in the hotel for the guest meeting location.

### ***Hotel Signs***

- You will want to be familiar with the signage that the hotel provides including in-room TV schedules for the conference. Most hotels have digital signs outside each room and digital schedules of all hotel activities at various common areas. It is worth reminding attendees as to where to look for this information. The first day is the most difficult, and as people become familiar with the facility, there are fewer problems.

### ***Host Staff***

- If you are in a highly visible area in the hotel, be prepared to know where things are because you will become the vocal signs with people asking for the location of rest rooms, other conferences, registration areas, etc.

## Speakers

- If possible, try to hear speakers in advance.
- Invite speakers as early as possible.
- Provide speakers with the conference theme so that they have the opportunity to weave the theme into their presentations.
- Send a thank you note after they accept the invitation to speak.
- Confirm what expenses, if any, NCSFA will absorb.
  - Expenses may be:
    - Hotel room for one night – the night prior to their presentation
    - Meals during the 24-hour period of their stay
      - This year speakers were invited to join us for breakfast and/or lunch, but usually not for dinner since some dinners were on your own or hosted by a sponsor.
    - Airline expenses (generally for keynote speaker only)
    - Vehicle parking expenses at the hotel
- It is advantageous to agree upon an all-inclusive fee for speakers, especially the keynote speaker. It is much easier to administer since the costs will not vary.
- Establish deadlines for the following:
  - NCSFA agreement (ASAP)
    - Obtain current document from NCSFA (sample attached)
  - Speaker bio and photo (120 days prior to conference)
  - List of A/V requirements (60 days prior to conference)
    - Obtain current document from NCSFA (sample attached)
  - Electronic copy of presentation (30 days prior to conference)
    - Time will be needed to prepare for including the presentations in the book and to print.
    - Inform speakers that copies of presentations will be inserted in the attendees' notebook prior to the conference and there will be no opportunity to add the material after printing should they submit their copy beyond the due date. You may also want to mention the value of having their materials in the book that is used as a resource by fleet managers well beyond the conference.
  - Send an email about a week before each deadline and ask if they have any questions.
  - Send a follow-up email either on the due date or the day after each deadline reminding them that the information is due.
  - Acknowledge receipt and profusely thank them.
- Featuring a speaker on the NCSFA website was very beneficial to the speakers and the attendees. You may want to notify them when they are featured.
- Try to have the moderator or another designated person greet the speaker when he/she arrives at the conference.
- If a consultant is speaking, a great way to provide valuable information to the audience is to include on the podium a State agency using the program and/or service. The State representative should share results and challenges and present them in a positive way.

## **Sponsorship**

The Conference is greatly supported by numerous sponsors. The sponsorship program for Hershey was created by the Corporate Liaison and the Conference Host and then presented to the Executive Director for distribution. The Executive Director does an excellent job of promoting sponsorship; however, the Host State can enhance those efforts whenever opportunities are presented. One of the best ways to do this is to promote the conference from your personal experience and knowledge. It is important to notify the NCSFA Executive Director for follow-up purposes and to tell the prospective sponsor that he/she will have contact from the Executive Director.

All sponsorship opportunities should be distributed at the same time to all vendors. The corporate liaison committee also contributed to the sponsorship efforts by calling vendors and asking them for their support.

There are numerous ways to support the conference and at numerous financial levels; in other ways, there are opportunities to meet everyone's comfort level.

In the future, NCSFA may want to continue to explore medal level (bronze, silver, gold, platinum) of sponsorships rather than individual events. Having input from the participating sponsors is required to make this a win-win issue for NCSFA and its sponsors.

## **Tee-Shirt Swap**

### ***Rules***

- Be sure to publish the rules of the t-shirt swap in the program book as well as online.
- Emphatically state that the t-shirt must be a new shirt.

### ***Room for the event***

- We learned that it is quite advantageous to have a large room for the tee shirt swap. It saved a lot of time and progressed very smoothly. When people had room to move to choose their first shirt – or their tenth – it reduced the amount of time to do so.
- Make sure there is plenty of seating in advance of the event.

## **Transportation**

### ***Airport shuttle service***

- While this may be a very nice service to offer, I would not recommend doing so. Flights change, people change their plans without notifying you, and sometimes at the airport they decide to obtain a rental car.
- However, if you do want to provide transportation to/from the airport, I would recommend offering it prior to the conference and the day after the conference ends. Otherwise, someone will be missing parts of the conference. Of course, if you have drivers who are not attending the conference, it is a non-issue.

- Choose dependable drivers
- Check for valid driver's license
- Confirm pick up times to/from the airport
- In California you may want to make arrangements with Super Shuttle. They may have flyers that can be sent to the attendees to present for a discount.

### **Rental cars**

- Enterprise was very generous in offering vans to use for the Hershey conference. They had a rental office inside Hershey Lodge which made this a very practical and convenient solution. You may want to check with the hotel staff, ask if a rental car company is located on the property and approach a representative of that company. If they cannot offer vehicles at no cost, they may offer a substantial discount. You may even consider offering them a booth at the exhibit fair either in exchange for vehicles or at a reduced price.
- It is very convenient to have a rental vehicle available during the conference. There will be trips to purchase office supplies and other necessary, unanticipated items.

### **Vendor Reception**

- The first NCSFA vendor reception at the end of day 2 was a huge success. The NCSFA Corporate Liaison was the catalyst in making this happen. It was an excellent way to thank the vendors for participating and get their input and feedback for improvement to future conferences. NCSFA provided drinks (beer and wine) and hor d'oeuvres at a minimal cost. NCSFA also provided four gift cards to be raffled at the reception.
- Total vendor participation may be the deciding factor in what is provided for the reception and the prizes; obviously, the greater number of vendors, the easier it is for NCSFA to provide the same or increased benefits.
- The Corporate Liaison hosted this function, thanked everyone for participating and had an agenda of items to get immediate feedback. Each vendor was also asked to complete a survey created by the Corporate Liaison.
- This function appeared to be highly successful.
- Advertising this function as a "closed function for exhibitors only" is important. Even though that was done this year, we noticed that spouses and/or guests joined this session.

### **Venue Selection**

- Understand what the hotel will/will not do.
- Know the hotel staff and how to locate them
- Know the maintenance and valet staff; they can be extremely helpful with moving materials
- Be aware of the bus pick-up location for off-site activities
- Ask the hotel about available transportation to/from the airport.
- Publish hotel offerings as they pertain to conference attendees on the NCSFA website

- If the hotel can provide electronic access to the Host State Representative on the room block, it will be very helpful in making any adjustments. During the three weeks prior to the conference, there will be a lot of activity with additions, modifications and cancellations. Check the site at least twice a week. Consult with NCSFA and/or Mercury to merge the hotel reservation data with the conference registrations. Some of the attendees will stay at other hotels in the area; also some of the attendees will be local and not book a hotel room.
- Confirm that the hotel will allow a replacement reservation if someone cancels a reservation after a deadline. Of course, having a deadline as close to the first day of the conference is advantageous. Some hotels restrict this function, and room blocks may not be met causing unnecessary expense to NCSFA.

## **Volunteers**

Different numbers of volunteers will be needed at various times during the planning process and during the conference days. The Host Team will need to evaluate their needs based on the projects which vary each year. Some of the responsibilities are standard, and others are not. If games need to be created or welcome gifts made, it requires time and talent of a number of people. If these functions are either not done or outsourced to a company, volunteers' time may be minimal. However, volunteers are needed for the following:

- Basic conference planning
- Finding/inviting speakers
- Tracking deadlines for all speaker materials
- Speaker follow-up
- Pre-conference activities
- Guest program
- Welcome gifts
- Transporting materials to hotel
- Registration desk
- Choosing NCSFA gifts
- Wrapping gifts
- Gathering materials for conference briefcase
- Filling the briefcases with program books and materials

After doing as much as you can and doing everything as best as you can, it is time to enjoy the conference. It is very rewarding to see all of your efforts come to fruition and see the participants actively enjoying the conference.

Best of luck for a highly successful conference!