

## **INTRODUCTION**

This handbook is developed for future chairmen and committees planning and implementing the NAEOP Annual Conference and Institute in an efficient and effective manner. Variances are subject to approval following the flow chart chain on page 20.

The Board of Directors and the Executive Director review the Handbook annually at the winter board meeting. Conference chairmen are encouraged to submit their suggestions for changes to the Executive Director following the completion of the Conference which they chaired.

Members of the hosting association(s) are considered to be the official hosts for the Conference and Institute.

The Conference Chairman will work closely with the President, Board of Directors, and Executive Director in the planning of the Conference. Each hosting association brings its special feeling and personality to the Conference. Hosting a national conference is a wonderful and enriching experience. Enjoy it and have fun!

## GENERAL INFORMATION

In an effort to be concise, certain terminology has been used. Please note the following references:

|                             |   |
|-----------------------------|---|
| President                   | NAEOP President   |
| President Elect             | NAEOP President Elect   |
| Executive Director          | NAEOP Executive Director  |
| Conference Chairman         | Annual Conference Chairman/Co-Chairman  |
| Institute/Briefing Chairman | Annual Institute Chairman/Co-Chairman   |
| Core Committee Coordinators | Meals Coordinator, Print Coordinator, Proceedings Coordinator, Registration Coordinator, Social Coordinator |
| Specific Chairman           | NAEOP Committee Chairman, i.e., Awards Chairman   |
| Hosting Chairman            | Hosting Association's Committee Chairman, i.e., Chairman of the Awards Banquet                              |
| Magazine                    | Official Publication of NAEOP   |
| Inspiration                 | Motivational readings or poems. Will follow the presentation of the flag and at other times noted.          |

### Affiliations

Association of School Business Officials International

National Association for Public Relations Association

National Association of Elementary School Principals

American Association of School Administrators

American Association for Adult and Continuing Education endorses the underlying concept of the Professional Standards Program

## **RESPONSIBILITIES**

The Hosting Association or Area will:

- A. Be affiliated with NAEOP
- B. Name the Annual Conference Chairman and/or Co-Chairman
- C. Name the Institute/Briefing Chairman and/or Co-Chairman
- D. Submit Chairman's names to the Board of Directors for approval at time of invitation.
- E. Be the official host for the Conference and Institute.
- F. Select speakers and greeters for the Conference and Institute in consultation with the President and Executive Director. (Governor, Mayor, Superintendent, etc.)

### **Invitation**

- A. An official invitation must be submitted to the President and Executive Director in writing who will present the invitation to the Board of Directors for approval. Included in the invitation will be a copy of the minutes or a statement, which has been approved by the affiliated association **membership** extending an invitation and the name of the proposed conference and institute chairmen.
- B. Invitations may be submitted to NAEOP for consideration at any time. Invitations will not be considered more than five years in advance of the date of the proposed conference.

### **Site**

- A. The selection of the site must be coordinated by the Executive Director with input from the hosting association. The Executive Director, upon approval of the Board of Directors, will make a site visit and will negotiate the contract with the hotel. The Conference Chairman may be invited to attend the site visit.
- B. The Conference site should be in an area serviced by major airlines. Airport shuttle services are desirable.
- C. The Executive Director will negotiate reduced room rates (conference rates) and with assistance from the Conference Chairman determine that the space requirements assigned by the hotel are sufficient. Only one hotel will be used for all functions. Room accommodations may be divided among other hotels on an overflow basis only.
- D. The Presidential Suite (President) and a one-bedroom suite (President Elect) will be provided complimentary.
- E. Suites and/or rooms for hospitality and conference/institute chairman will be addressed in the contract with the hotel at which the Conference is held.
- F. Special reduced room rates will be requested for elected and appointed members of the Board of Directors because of the length of stay required for them to fulfill their responsibilities at the Conference.

- G. Meeting rooms should be complimentary. Negotiate number and size of meeting rooms.
- H. The Conference site must have adequate secured space for exhibits. The space should accommodate room for 6' or 8' skirted table with four chairs each for the following – PSP (1), Membership/NAEOP Promotional items (1), Future Conference Hosting Associations (2-3), NAEOP Foundation (1), Special Projects (8), Retirees (4-5), and four extra tables. It is desirable that the space for outside exhibitors and NAEOP tables be in separate area of the room.
- I. Negotiate AV equipment
- J. Secure storage room for flags and decorations, receipt of packages, materials shipped in and accommodations for return shipping of packages.

**The Conference Chairman will:**

- A. Schedule planning meetings with the Conference Core Committee Coordinators to develop the timelines, budget, and program of the Conference.
- B. Work with the President and Executive Director to make arrangements for the President and Executive Director to attend one conference planning meeting within the 12 months prior to the conference. This is an expense paid trip and expenses must be accounted for in the conference budget.
- C. Present the tentative budgets, program content, and timelines for the Conference and Institute to the Board of Directors approximately 18 months (winter board meeting) prior to the Conference. Expense will be budgeted in the conference budget.
- D. Present the final budget, program content, and timelines for the Conference and Institute to the Board of Directors (annual conference meetings) approximately 12 months prior to the Conference. Transportation expense for one person is a conference budgeted item.
- E. Obtain the hotel registration form and ensure that it carries a notation that registration is for the NAOEP Annual Conference and Institute for inclusion in the magazine.
- F. Work closely with the President, President Elect, Executive Director, Institute Chairman, and PSP Registrar when planning workshops and speakers in order to meet qualifications for PSP credits and to assure that speakers and topics are of interest to members.
- G. Plan the Conference schedule in conjunction with the President and Executive Director.
- H. Keep the President and Executive Director informed in writing of the progress of conference plans. Copies of all correspondence sent by the hosting association regarding the Conference will be sent to the President, President Elect and Executive Director.
- I. Request support for the Conference and Institute from local and state superintendents, higher institution presidents, administrators of private and parochial schools, and government officials.

- J. Schedule a meeting with the President, President Elect, Executive Director, Conference Chairman, Institute Chairman, and key hotel/convention center staff immediately prior to the Conference to review the daily function sheets, answer questions, and discuss plans. The hotel/convention center will provide function sheets to those attending the meeting.
- K. Make arrangements to deliver the Conference packets to the members of the Board of Directors at the first board meeting.
- L. Provide a copy of the Conference program and all meal function programs to the President, President Elect, Executive Director, Secretary/Treasurer, appropriate Committee Chairman, and Historian at the first board meeting.
- M. Provide five (5) additional copies of all programs to the Executive Director for the archives.
- N. Coordinate with Executive Director the disbursement of the official conference evaluation form to be sent to all attendees electronically with the results compiled by the National Office and presented to the Board of Directors.
- O. Coordinate AV Equipment:
  - a. Utilize school equipment as a cost-saving factor whenever possible. The association is not liable for equipment brought in by individuals or school systems.
  - b. Coordinate with all committees on the AV needs for the Conference and Institute.
  - c. Make sure that all equipment is in working order.
  - d. Have replacement bulbs and backup equipment such as extension cords and surge protectors if necessary.
  - e. Return all items to owners.
- P. Provide physical space and make necessary arrangements for the Retirees' breakfast, class, and Business Meeting, in coordination with the Retirees' President.
- Q. Schedule meeting for Foundation Executive Board meeting. Consult with the Foundation President and Executive Director on date, time, and number of participants.
- R. Approve the use of volunteer workers not participating in a conference in any capacity other than assisting in an individual event. These volunteers are exempt from paying the established conference fees, however, if they partake of a meal or incur an expense they will be responsible for that expense.

**Responsibilities of the Conference Chairman relating to briefings are to:**

- A. Arrange for briefing rooms to accommodate the number registered for each session. The number of registrants will be provided by the National Office.
- B. Ensure that special room arrangements and AV equipment are provided. These requests will be provided by the Institute/Briefing Chairman.

**Responsibilities of the Conference Chairman regarding the General Sessions are:**

- A. Piano
- B. Flag stands (and state flags pressed – Proceedings Chairman in charge of this)
- C. Placement of nameplates provided by National Office for those individuals seated at the head table as designated by the President.
- D. Hanging of the NAEOP banner (provided by the National Office)
- E. Room setup – theater style
- F. Minimum of two (2) standing microphones in audience
- G. Podium and microphone at head table
- H. Water and glasses on head table
- I. Water and glasses in the rear of the room.
- J. LCD projector and screen positioned for viewing by all members.
- K. Table at the entrance of the meeting room for Credentials Committee.
- L. Reserved chairs on the front rows for the Board of Directors and Past Presidents at the First General Session.
- M. Available and adequate space for tellers to count ballots

**Responsibilities of the Conference Chairman relating to the Advisory Council meeting are to:**

- A. Arrange for the meeting room in coordination with the Advisory Council Chairman, President, and the Executive Director.
- B. Provide adequate space and tables for registration if needed.
- C. Ensure that the meeting room is set either theater or classroom style with a raised head table. Other setup configurations considered are to be approved by Executive Director.
- D. Provide a podium and microphone for the head table. Floor microphones will be placed at the front of the center aisle and half way down the center aisle. Additional microphones will be placed if needed.
- E. Provide LCD projector and screen.
- F. Ensure that the American flag is posted in the correct position in the room.
- G. Provide reserved seating for the delegates. A separate area, clearly marked, will be provided for the observers.
- H. Provide reserved seating in the room for the resource people, Board of Directors and the National Office Staff.

**The Conference Chairman will be responsible for:**

- A. Reserved seating for scholarship winners if attending.
- B. Providing adequate tables for awards.

**Responsibilities of the Conference Chairman relating to the Awards Banquet are:**

- A. Arrange space for rehearsal prior to the banquet for PSP recipients. Chairs will be needed for recipients.
- B. Arrange for a raised head table, including a podium and microphone.
- C. Arrange for platform for presentation of certificates, including a standing podium, microphone and a skirted table.
- D. Arrange for a piano and microphone near the platform.
- E. Print the names of recipients receiving their PSP certificates in the program.
- F. Print the names of recipients of the Administrator of the Year and Office Professional of the Year in the program.
- G. Reserve seating for the NAEOP Past Presidents and special guests not seated at the head table with the approval of the President and Executive Director.
- H. Develop a theme and program design to go along with the President's theme, and also that reflects the conference theme. Give program information to Meal Functions Chairman.
- I. Choose two or three menu options with the assistance of the Meals Committee Coordinator.
- J. Choose an inspiration
- K. There shall be a no-host hospitality time preceding the banquet.

**The Conference Chairman is responsible for:**

- A. Scheduling a block of time for the Installation banquet.
- B. Placement of head table nameplates as directed by President and Executive Director.

**General Institute Information**

- A. The Annual Institute will be planned by the Institute Chairman in coordination with the Conference Chairman, President, Executive Director and the PSP Registrar.
- B. Morning and afternoon sessions will be scheduled.
- C. Lunch is normally provided for Institute attendees.
- D. Time at the beginning of each day of the Institute may be provided for programs planned by the President and President Elect at their discretion.

**The Institute/Briefing Chairman will:**

- A. Develop a tentative budget and course offerings for the Institute in coordination with the Conference Chairman, President, Executive Director, and PSP Registrar.
- B. Review evaluations of the previous Institutes.
- C. Contact the President of NAREOP in planning workshop sessions for the

retirees.

- D. Be responsible for the implementation of the overall Institute program to include:
  - a. Program selection, accreditation, course approval, and a course approval credit reporting system.
  - b. Securing instructors – resumes for each instructor will be sent to the Executive Director.
  - c. Draft the final program for printing purposes.
  - d. Submit speaker information (a biographical sketch/resume) and program, titles etc. for the magazine.
- E. Confirm all arrangements with each instructor. The Executive Director will provide contracts to be signed by instructors and be returned to the Executive Director.
- F. Make alternate plans in the event an instructor cancels the planned presentation.
- G. Arrange for greeting Institute instructors and provide them with all information needed.
- H. Accompany instructors to the physical locations assigned for their presentations.
- I. Develop a plan for distributing certificates at the conclusion of each Institute class. A certificate template will be provided by the National Office.
- J. Submit all bills for payment to the National Office by August 15.
- K. Forward the names and addresses of each Institute instructor to the President, President Elect, Executive Director and the Conference Chairman for letters of appreciation.
- L. Maintain attendance at each session on the roster provided by the National Office. Rosters will be returned to the Executive Director or her designated staff person.

- 1. Institute classes begin

- 2. First Timer's Event

First Timer's Orientation Function: The Membership Chairman will plan, in conjunction with the President, Executive Director and Conference Chairman, an orientation function to recognize and inform first timers of what to expect and an insight into the different events for the conference. This function shall include food.

- 3. Retirees' Board Meeting - The Proceedings Chairman will work with the NAREOP President, Executive Director and the President of NAEOP to schedule the board meeting room and time. A podium and microphone must be available.

- 4. Exhibits/Special Projects setup

## **Finances/Reports**

- A. All conferences will be self-supporting and budgeted accordingly with an anticipated revenue of \$5,000 minimum. In the event of a deficit, NAEOP will assume the responsibility for payment of outstanding bills.
- B. One year to eighteen months prior to the meeting, advance money in the amount of \$1000 may be provided to the hosting association upon request of the Conference Chairman by voucher to the Executive Director. Itemized receipts must be turned in to account for the advance money and any money left must be returned to NAEOP. Receipts must be for an approved expense or approved expenses outlined in the conference budget.
- C. A guest fee of \$25 for a non-NAEOP member is required.
- D. Guests attending a single event, such as the Awards or Installation Banquets, will be exempt from the conference guest fee.
- E. In compliance with the NAEOP reimbursement policy, all expenses for the President, President Elect, Parliamentarian, Executive Director, and the National Office staff will be included in the Conference budget and reimbursed from the Conference revenue.
- F. Financial reports and evaluations will be compiled by the National Office staff and submitted to the Board of Directors at the winter board meeting following the conclusion of the Conference. The Executive Director will provide to all future conference chairmen a copy of the compilation of the evaluations.

## **The NAEOP Executive Director will:**

- A. Sign all contracts
- B. Present proposed meeting dates and site following a site visit accompanied by the Conference Chairman to the Board of Directors for approval
- C. Meet with the Conference Chairman prior to the planning of the Conference and Institute to review this handbook.
- D. Keep the Board of Directors informed of all plans and progress for the Conference.
- E. Present the tentative budgets, program content, and timelines for the conference to the Board of Directors approximately 18 months prior to the Conference in the event the Conference Chairman is unable to attend.
- F. Present the final conference program content and budget to the Board of Directors for approval approximately one year prior to the Conference in the event the Conference Chairman is unable to attend.
- G. Provide proofing copy of information submitted for the winter issue of the magazine to hosting conference chairman in a timely manner.
- H. Include the following statement on the registration form: Reservations and payment for hotel accommodations and transportation to and from the

Conference are the sole responsibility of the Registrant.

Arrange for a professional photographer to take pictures throughout the Conference with the assistance of the Conference Chairman. Finalize approval and contract negotiations with the photographer. A meeting will be scheduled with the Executive Director, magazine editor, President, President Elect, events chairman and Foundation President prior to the start of the conference to confirm specifics on what pictures are to be taken at which events. The Executive Director will confirm with the photographer on the pictures needed.

- I. Oversee pre-registration at the National Office. On-site registration is handled by the National Office Staff also.
  - a. Acknowledge receipt of registration by email, fax or mail immediately upon receipt of registration forms and fees. Include special letters (provided by appropriate chairman) to first timers, PSP recipients, and retirees. Also include registration check list so the attendee can verify registration before the conference.
  - b. Maintain records of registrants by state, area and council.
  - c. Provide envelopes or folders for tickets, ticket templates and other items relating to the Conference to be distributed from the registration desk.
  - d. Provide nametags for each participant, including speakers, and special guests.
  - e. In concert with the President (for PSP/Awards) and President Elect (for installation), provide table assignment lists for Awards Banquet and Installation Banquet.
  - f. Provide certificates for all NAEOP Committee members which will be emailed to members after conference.
- J. Oversee the preparation of the Conference and Institute registrants list. Periodically provide the Conference Chairman and the Board of Directors with updated totals for each event.
- K. Provide the Professional Development and Institute Chairman with the number of registrants for each session as of the last office day for pre-registration. These Chairmen will then provide this information to each presenter.
- L. Prepare template for certificates and tickets for each general session, briefing sessions, and institute classes and forward to conference printing chairman for printing.
- M. Provide a list of requirements (copier, paper, computer, printer, thumb drives, etc.) to Conference Chairman for the on-site national office.
- N. Provide a final report of the conference to the Board of Directors at the winter board meeting.
- O. Provide a VIP list to the Conference Chairman to be shared with the hotel prior to receiving reservations.
- P. Provide all awards (certificates/plaques) and proclamations.
- Q. Provide tally sheet in an appropriate color for the Advisory Council/business meeting to record votes.

- R. Schedule meeting room for Partners Reaching Out Governing Board, PSP Governing Board, and the NAEOP Foundation. Consult with the PRO and PSP Chairman and the NAEOP Foundation President on date, time and number of participants.
- S. Make alternate plan for any outdoor activities
- T. Provide an on-line survey following the conference electronically to all members in attendance. Provide results to the Board of Directors upon completion and compilation of the report.

**The NAEOP President will:**

- A. Work in close contact with the Executive Director and the Conference Chairman.
- B. The President will appoint pages, tellers, monitors, timekeeper, minutes approval committee, credentials committee and others as needed to carry out the functions of all general sessions and the Foundation meeting.
- C. Work with the Executive Director and the Conference Chairman to make arrangements to attend one conference planning meeting within the 12 months prior to the conference. This is an expense paid trip and expenses must be accounted for in the conference budget.
- D. Preside at each conference session. Start promptly.
- E. Send letters of invitation to representatives from associations with which NAEOP is affiliated, allied, or endorsed by, and other educational institutions.
- F. Prepare the head table seating charts for all functions and provide a copy of seating charts to appropriate individuals. As early as possible, consult the President Elect regarding the Installation Banquet and the Foundation President for the Foundation Annual Meeting head table seating charts.
- G. Approve with the assistance of the Executive Director the reserved seating arrangements for guests, dignitaries, NAEOP Past Presidents, Jackie Evans Distinguished Award recipients, and Past Educational Office Professionals of the Year who are not seated at the head table.
- H. Coordinate details for Memorial Service/Celebration of Life.
- I. Work with Advisory Council Chairman to obtain members for Credentials Committee

**The NAEOP President Elect will:**

- A. Work with the President on head table seating assignments for the Installation Banquet.
- B. Work with the Conference Installation Banquet Chairman on theme, decorations, and program.
- C. Determine the receiving line for the reception following the Installation Banquet.
- D. The following line up is provided as a guide:
  - a. Immediate Past President
  - b. President
  - c. President Elect
  - d. Vice President

- e. Secretary/Treasurer
- f. Area Directors
- g. Council Chairmen
- h. NAREOP President
- i. Foundation President
- j. Appointees
- k. Executive Director

**The NAEOP Membership Chairman, with the assistance of the Credentials Committee will:**

- A. Be responsible for membership verification of participants entering the meeting room for the general sessions and the NAEOP Foundation meeting.
- B. The Credentials Chairman will establish a quorum for each general session. The Membership Chairman will receive this information from the credentials chairman then quote from the Bylaws, Article VII, Section 6 and give the number of members present.
- C. Be responsible for the distribution and collection of the ballots, voting cards, and presentation of certificates of attendance at the General Sessions.

**The NAEOP Secretary will:**

Be responsible for the distribution and collection of the ballots and committee descriptions for the area meetings as well as submitting the election results to the National Office Staff for inclusion on the President's script.

**The NAEOP Board of Directors will:**

Approve the dates, location, conference chairman, schedule, registration fees, and budgets for the Conference.

**Responsibilities of the Professional Development Committee Chairman will be to:**

- A. Maintain attendance lists. Attendance for each session will be taken by a committee member on the rosters provided by the National Office.
- B. Submit lists to the PSP Registrar/National Office designated staff person at conference.
- C. Distribute certificates or attendance for each briefing.

**General Sessions**

**Informational Items Regarding General Sessions**

- A. The outline for the General Session will be prepared by the Executive Director under the direction of the President will include:
  - a. Invocation/Inspiration
  - b. Presentation of State Flags
  - c. Presentation of Colors/Patriotic Music
  - d. Greetings
  - e. Response to Greetings (President Elect)

- f. Introduction of Board of Directors
  - g. Introduction of the National Office Staff
  - h. Introduction of Past Presidents
  - i. Roll Call of States (NAEOP Secretary)
  - j. Keynote Speaker (not to exceed two for all sessions)
  - k. Memorial Service/Celebration of Life
  - l. Retiring of Flags
- B. The President will appoint pages, tellers, monitors, timekeeper, minutes approval committee, credentials committee, and others as needed to carry out the functions of all general sessions and the Foundation meeting.
- C. The Conference Chairman will confer with the President and Executive Director regarding individuals who will participate in the General Session such as:
- a. Keynote Speakers
  - b. Color Guard
  - c. Dignitaries to bring greetings
  - d. Person to give invocation/inspiration

#### **General Guidelines for Core Coordinators:**

- A. Communication and cooperation are key. Always keep the Conference Chairman and Executive Director informed. Refer all questions to them. The order is that all Event Chairman report to their respective Core Committee Coordinators who in turn report to the Conference Chairman and Executive Director.
- B. Before sending out any correspondence, please let the Conference Chairman review it.
- C. The Conference Chairman and Executive Director will be the **only** authorized personnel to communicate with the hotel staff.
- D. Keep the following in mind:
- a. Deadlines should be strictly adhered to. It is important to have plans for the Conference and Institute run smoothly and to get information to members in a timely manner.
  - b. Each committee is equally important. If one does not carry through, the others are affected.
  - c. Stay well informed about the many different aspects of the event.
  - d. Pass on information to other committee members.
  - e. View this as an opportunity for growth and self-renewal. Here is an excellent chance to learn new skills that you can transfer to your job or other settings.
  - f. Keep a sense of humor and a positive attitude and you'll have a good time.
  - g. Committee Chairmen should submit written progress reports to the

Conference Chairman periodically and the reports should include:

1. Committee Name, chairman or contacts
  2. Status
  3. Problems
  4. Recommendations
- E. Establish conference goals and objectives
  - F. Create budget and schedule
  - G. Create promotional plan
  - H. Organize and distribute press release
  - I. Publicity: Send as early as possible, an information article to the editor of the newsletters about the upcoming conference.
  - J. Mail/email notice to all administrators to encourage attendance by their office professionals. Advertise in local newspapers, in school administrators' publications and department of education newsletters if possible. Use social media (Facebook, Twitter, etc., with prior approval from the Executive Director, President and Conference Chairman).
  - K. Give recognition to volunteers
  - L. Celebrate accomplishments
  - M. Prepare a job description: define responsibilities and expectations for each committee.
  - N. Define level of authority – be sure people understand what authority their committees have to represent or make commitments for the association.
  - O. Build teams – get acquainted.
  - P. Establish reporting mechanisms
  - Q. Encourage chairmen to follow up with inactive members
  - R. Hold orientation for committee chairmen
  - S. Set forth the duties of each committee very specially so all individuals clearly understand their own responsibilities as well as the duties of other members.
  - T. Keep communication lines open at all times
  - U. Promote professionalism by obtaining quality speakers, workshop presenters, and entertainment. Programs should be designed to provide opportunities for continued professional and personal growth and adult learning.
  - V. The program should be consistent with the President and/or Conference themes. The program should be substantive and have a variety of subjects and methods of presentations, encourage personal involvement, start and end on time, have stimulating speakers, with comfortable and attractive physical facilities.
  - W. Preparation is the key to being a good host, keep program short, and don't let anyone speak at a meal for longer than 10 minutes. Don't let your major entertainment last longer than 15 minutes.
  - X. How we meet and greet our attendees will set the tone for the entire event. When you welcome attendees, make sure you combine warmth with efficiency.
  - Y. Guide arriving attendees with visual information that is not only informative but also attractive. Make sure the same theme is carried out in our informative signs. Signs should be prominently displayed and easy to read.

- Z. Ensure that VIPs receive proper treatment. Special guests, speakers, entertainers, board members, etc., are important to our event and should be treated as though you really believe they are important to the success of the function. The trick is to discover how to treat VIPs special when you also want to consider that everyone attending is special.
- AA. Be prepared for any request. The only way to avoid being unprepared is to be ready for anything. Always keep a car on hand during the meeting for emergencies. It is also wise to explore the neighborhood and become familiar with the territory if you are away from familiar surroundings.
- BB. See page 23 for information on how to invite speakers, presenters, and entertainers.
- CC. After the Conference:
  - 1. Check all meeting rooms to be sure nothing is left behind.
  - 2. Pack and remove all supplies brought in.
- DD. Within a week after Conference:
  - 1. Return all rented and borrowed equipment and obtain receipts.
  - 2. Verify all charges down to the last item.
  - 3. Submit to the Conference Chairman all applicable conference receipts that have been budgeted.
  - 4. Within the new few days, write thank you notes to speakers and any others whom you wish to acknowledge.
  - 5.

### **Contributions**

- A. Any letters to prospective contributors (business or individuals) should be reviewed by the Conference Chairman and Executive Director. The Conference Chairman and the committee chairman should co-sign the letters requesting for donations.
- B. As soon as contributions are received, they should be forwarded to the National Office. A list of the name, address, and the amount contributed should be forwarded to the Conference Chairman as soon as donations are received.
- C. Thank you letters should be mailed to all contributors by the committee chairman and the Conference Chairman.
- D. All contributors should be listed in the printed program. The Conference Chairman should provide the printing committee with such a list prior to the deadline for the printing of the program.

### **Speakers, Presenters, Entertainers**

- A. When choosing a speaker, workshop presenter, or entertainer, think big. Don't be hesitant to ask the busiest, most popular, prominent persons in the

community. The worst that can happen is that they might say no or charge such an enormous fee that the budget won't allow.

- B. When inviting a speaker, demonstrate your professionalism and that of the organization by following these procedures:
- a. Send a polite and informative letter to everyone who agrees to speak or entertain at the function. List exactly the procedures and the logistics.
  - b. Describe the type of organization and the number of attendees expected.
  - c. Explain the theme of the Conference.
  - d. Explain the interests of the audience and what you would like the speaker to emphasize.
  - e. Mention the date, place, meeting room set-up, and length of time allotted.
  - f. When the speaker has accepted, confirm the details in writing immediately.
  - g. Request a list of equipment or needs.
  - h. AV equipment (microphone, projectors, screen) – check the AV requirements, not once, but three times and have a professional in attendance during the program.
  - i. Check on whiteboards or flip charts
  - j. Request the name of their secretary and home number for emergencies.
  - k. Offer assistance in copying any handouts. Ask if they can provide an electronic copy of their handouts and permission for posting on website, app, etc.
  - l. Ask for the speaker's resume as well as a photo (for the magazine and/or program).
  - m. If the speaker is coming from out of town, clarify their needs and costs for transportation and hotel accommodations.
  - n. Assign someone to meet the speaker at the airport or hotel. Introduce the speaker to the President and the Conference Chairman.
  - o. The person introducing the speaker should be brief, pronounce speaker's name correctly, and use their correct title. Give relevant accomplishments that make it evident why the person was chosen. Do not make the speech for the guest. Persons not known to the assembly are introduced. Persons known to the assembly are presented. Use imagination in the introduction – avoid – “without further ado”, or “I give you,” or “our speaker needs no introduction.”
  - p. After the speaker has finished, a few words of appreciation should be extended.
  - q. Send note of thanks and appreciation after the meeting. Include summaries of evaluations from their presentation, if applicable.
  - r. Have a backup speaker in mind, in case the scheduled speaker has a last-minute emergency.

### **Photography**

- A. The Executive Director and magazine editor will coordinate arrangements with

the chairman of the Annual Conference and Institute, for pictures at all meetings. A list of requested pictures will be compiled and distributed before the conference is needed.

- B. The following persons will request particular pictures to be taken:
  - a. President
  - b. President Elect
  - c. Magazine Editor
  - d. Executive Director
  - e. Past Presidents
  - f. Foundation President
  - g. NAREOP President
- C. The photographer will take group and individual pictures of the board members prior to the beginning of the July board meetings.
- D. Type of pictures to be taken:
  - a. One or two pictures at the beginning of each morning
  - b. Pictures during the Institute Classes and other happenings during the week.
  - c. Group pictures: Luncheons, Installation Banquet, Advisory Council, Awards Banquet, various committee meetings, state pictures, etc.
  - d. State group pictures are to be scheduled with the photographer (before or after general sessions, end of the day, etc.).
  - e. Individual pictures: Pictures that the President, President Elect, Executive Director, magazine editor and others may want.
  - f. Appointments can be made with photographer.
- E. Expectations of the Photographer
  - a. Proofs or pictures for magazine at no charge.
  - b. Patience and diplomacy with all members.
  - c. Pictures to be displayed via internet site as quickly as possible for viewing.
  - d. Notify Executive Director of any special needs.
  - e. Have sufficient staff to handle photography for all special events (General Sessions, awards banquet, installation banquet, etc.)
  - f. Quick turnaround time of pictures. If possible, pictures taken on display via internet site the following day after event.
  - g. Have proofs available on a website within two (2) weeks after conference. Notify Executive Director when available.

### **Complimentary Tickets**

- A. The following positions receive a complimentary ticket to each conference function (i.e., institute classes, briefings, meal functions, and/or other special events). These complimentary tickets MUST be included in the Conference and Institute budgets.

NAEOP President

NAEOP President Elect  
NAEOP Executive Director

B. In addition to those listed above, these attendees will receive one complimentary ticket to that function:

|                      |   |
|----------------------|---|
| Institute Luncheon:  | Institute Presenters; Institute Chairman/Co-Chairmen  |
| Awards Banquet:      | Administrator of the Year recipient and spouse/guest<br>Olive T. Ritchie Office Professional of the Year recipient and spouse/guest<br>Banquet Speaker  |
| Installation Banquet | NAEOP Office Staff/Executive Director<br>NAEOP Office Staff/Executive Director<br>Parliamentarian<br>Speaker<br>Administrator of the Year recipient and spouse/guest<br>Olive T. Ritchie Office Professional of the Year recipient and spouse/guest |

C. The Conference Chairman and/or Co-Chairmen will receive one complimentary ticket for each conference meal function (area event, council event, awards banquet and installation banquet). This would be included in the conference budget.

D. The hosting association may, with the approval of the President and Executive Director, invite and provide for dignitaries, officials, and other special guests. Again, these MUST be included in the budget for each event.

### **Exhibitors**

- A. Space will be made available to outside exhibitors for a fee of \$200 for 2 days. Space will be made available to member exhibitors for a fee of \$150 for 2 days. Exhibitor space at the Conference will be limited each year depending on location and accommodations.
- B. Exhibitor Applications will be processed on a first-received, first-paid basis.
- C. Standard exhibitor space includes one 6' x 30" draped table with 2 chairs available upon request at no additional charge.
- D. The Exhibitor Application will indicate if the exhibitor needs to be located near an electrical outlet. Extension cords must be obtained through the hotel/convention center. Cost will be the responsibility of the exhibitor.
- E. The dates and times exhibits will be open will be determined on a yearly basis dependent on space availability and conference schedule.
- F. Exhibitors are encouraged to donate prizes for the drawings which will be held

during the Conference.

- G. The Conference Chairman will provide exhibitors with an advance copy of the Conference program so they will be aware of meeting and meal function times.

### **Past Presidents**

A meal and meeting time will be scheduled for the Past Presidents. This will be planned in conjunction with the Chairman of the Past Presidents' Council and the Conference Chairman. A variety of options may be offered including a private, catered meal in the hotel or a meeting at a restaurant in the area at a time to be determined. Payment for this event is the responsibility of the individuals attending.

### **Retirees**

The location and time for a class, Board Meeting, and Annual Breakfast or Lunch Meeting, will be scheduled for the Retirees. This will be planned in conjunction with the President of NAREOP and the Conference Chairman.

### **Presidential Pins**

Up to 500 pins will be purchased at a cost not to exceed \$2.00 per pin. Each person attending the Installation Banquet will receive a pin. The cost of the number of pins used for this purpose will be reimbursed from conference expenses/Installation Banquet. The remainder of pins will be used for membership recruitment. The design of the pin is the responsibility of the President Elect.

### **Promotional Items**

Any items purchased, i.e., t-shirts, by hosting association for the purpose of promoting the Annual Conference will be paid for by the hosting association and any profits will belong to the hosting association. Any incentives, i.e., drawings, are the responsibility of the hosting association. Upon approval of an invitation by an affiliate to host conference/institute, the hosting association may sell only one promotional item, i.e., shirt. One year prior to the Conference the hosting association may sell promotional items as desired.

### **Registration Refunds**

- A. Cancellations received on or before the printed Deadline Date will entitle the registrant to a full refund less an administrative fee.
- B. Cancellations received after the deadline date and on or before June 15 will entitle the Registrant to a 50% refund.
- C. There will be no refunds for cancellations after June 15.
- D. Refunds for special circumstances, i.e., death, illness, etc., will be considered by the Executive Committee on a case-by-case basis.
- E. No refunds will be made for no-shows.
- F.

## Registration Packet

- A. The official conference registration packet will be provided for all participants. The official program will be sent to the President and the Executive Director by the Conference Chairman for final approval. The Registration Committee will be responsible for the assembly of the packets, and for staffing the registration desk.
- B. The NAEOP Annual Meeting Official Program Registration Packet will be assembled by the registration chairman and committee with information from the National Office and will include, but not be limited to:
  - a. Annual Report
    - 1. Annual Meeting Agenda
    - 2. Business meeting rules
    - 3. Bylaws
    - 4. Financial statement
    - 5. Minutes of previous year
    - 6. President's Message
  - b. Foundation Meeting Info
    - 1. Business Meeting Agenda
    - 2. Bylaws
    - 3. Financial Statement
    - 4. List of Board of Trustees
    - 5. Minutes of previous year
    - 6. President's Message
  - c. Official Program
    - 1. Schedule of Events
    - 2. Location of functions
    - 3. Workshops/briefings/institutes available
    - 4. Hotel floor plan
    - 5. Instructions
    - 6. Other items as needed
  - d. Other
    - 1. Event tickets
    - 2. Name badges
    - 3. Conference pins (optional)
    - 4. Conference Bag (First Timers will receive a free conference bag, other registrants may purchase a bag on their conference registration form at pre-determined amount established by the National Office)

## Table Reservations

Table assignments for both the Awards and Installation Banquets are completed

by the National Office staff based on order of receipts of paid registrations to the conference.

## **Tours**

- A. A professional tour company will handle tours.
- B. Tours may be planned prior to the Institute, after the conclusion of the Conference, and after the sessions when no official activities are planned.
- C. All funds for tours will be made payable to the tour company.
- D. In the event a tour is cancelled it is the responsibility of the tour company to contact those that had previously registered to reschedule or refund.
- E. The tour company will work with the NAEOP Executive Director to set up a link from [www.naeop.org](http://www.naeop.org) to the tour company website when conference registration is online.
- F. A tour for the Retired Professionals will be planned. The President of the NAREOP will be consulted in planning this tour.
- G. A tour company should provide cold water on each tour if possible.
- H. Any special needs pertinent to a tour (such as bringing warm clothing, etc.) should be included in the registration information in the magazine or notice sent to each tour participant prior to the conference.

## **Annual Conference and Installation Banquet**

- A. There will be a no-host hospitality time preceding the banquet.
- B. The President Elect and installing officers will, in conjunction with the Conference Chairman, arrange this function.
- C. \$2.00 will be added to the price of each ticket to cover decoration expenses.
- D. \$2.00 will be added to the price of each ticket to cover President's pin.
- E. Official photographs of the incoming Board of Directors will be taken prior to the banquet.
- F. Tables will be reserved by the installation platform for special guests of the outgoing and incoming presidents, the incoming president's state association, family members of the Board of Directors being installed, Past Presidents, Honorary members, and past recipients of the Jackie Evans Distinguished Service Award.
- G. The program will include:
  - a. Presentation of the Jackie Evans Distinguished Service Award (if given).
  - b. Outgoing president's message.
  - c. Installation of Board of Directors.
  - d. Presentation of gavel and past president's pin.
  - e. Incoming president's message.
  - f. Presentation of gifts to incoming president by the local and state associations.
  - g. Proclamation (Public Relations Chairman responsible for this item)

- h. Closing of Conference by the President.
- i. Retiring of colors (if not done at the end of General Session #4).

### **Reception**

There will be a reception for the newly installed Board of Directors immediately following the banquet. Light refreshments may be served as a conference expense. Adequate space for the receiving line should be provided.

## Hosting Association Planning Committees

This list is not intended to be all-inclusive. The size of the membership of the hosting association may necessitate deviation from this list (i.e., there may be a chairman for all breakfasts, etc.). When a state association is the hosting association, various responsibilities may be assigned to affiliates within the state. The responsibility for each committee will include each phase of the preparation for the program, which is not specifically assigned to a NAEOP Board member.

| Conference Chairman/Co-Chairman   |  |   |  |  |   |
|---|--|---|--|--|---|
| Conference Schedule & Budget<br>AV Needs<br>Assistance with Hotel<br>Tour Company                           |  |   |  |  |   |
| Institute/Briefings<br>Chair/Co-Chairs  | Meals<br>Coordinator   | Print<br>Coordinator                        | Proceedings<br>Coordinator   | Registration<br>Coordinator  | Social<br>Coordinator   |
| General<br>Session<br>Keynote<br><br>Briefings<br><br>Institute<br>Presenters<br><br>Celebration of<br>Life | Breakfasts<br>Chairman<br><br>Lunch<br>Chairman<br><br>Award<br>Banquet<br>Chairman<br><br>Past<br>Presidents<br>Meal<br>Chairman<br><br>Installation<br>Banquet<br>Chairman | Programs<br><br>Other<br>items as<br>needed | Advisory<br>Council<br>Chairman<br><br>General<br>Sessions<br>Chairman<br><br>Flag<br>Ceremony<br>Chairman<br><br>Retirees<br>Board<br>Meeting<br><br>NAEOP<br>Board<br>Meeting<br>(current)<br><br>NAEOP<br>Board<br>Meeting<br>(new)<br><br>AV Needs | Packets<br><br>Conference<br>Pins (if<br>applicable)<br><br>Volunteers | Airport<br>Greeters<br>(if<br>applicable)<br><br>Hotel<br>Greeters<br>(if<br>applicable)<br><br>Door<br>Prizes<br>Chairman<br><br>Exhibitors<br>Chairman<br><br>First<br>Timers<br>Chairman<br><br>Hospitality<br>Chairman<br><br>Morning<br>Walk<br>Chairman |

## Meals Function Coordinator

**Responsibilities of the Meal Functions Coordinator are to oversee all the meal functions.**

- a. Area meal – work with the Area Directors
  - b. Council meal – work with the Council Chairmen
  - c. Installation Banquet & Reception – work with the President Elect
  - d. Awards Banquet – work with the PSP and Awards Chairmen
  - e. Past Presidents' function – work with Immediate Past President
  - f. Retirees' Breakfast/Meeting – work with the NAREOP President
- A. Coordinate with the committees in charge of each meal and the NAEOP Chairman. Determine the setup of each room and conference with the conference chairman and Executive Director regarding AV equipment needs.
  - B. Food function tips:
    - a. Plan menus – think about your guests when planning menus – are they conservative or more adventurous about food? Make sure items served are not offensive to the guests.
    - b. Check with the Registration Chairman to keep an accurate account of attendees: refer to the seating chart provided by the President informing if there will be a head table at the meals; confirm with Executive Director number of meals.
    - c. See that the Printing Coordinator receives program information from each meal function committee.
    - d. The President will provide the seating chart for the head tables.
    - e. Coordinate with other meal functions to ensure there is no duplication of meals.
  - C. Go to the event site well in advance to allow time for changes or corrections in setups. Check seating arrangements; count chairs and tables; check nameplates; check decorations; check table covers for rips, stains, etc.; check place setting.
  - D. Make sure meal is served on time and with dispatch. Never let your guests be rushed to their seats only to sit and wait another 20 minutes before any food appears.
  - E. Meet with the persons providing background music or entertainment. Make sure volume is sufficiently loud but not so loud conversation is impossible.
  - F. It is the policy of the NAEOP Board of Directors to keep the number of reserved tables for all functions to a minimum. However, some reserved spaces are necessary and are outlined under each meal function.
  - G. It shall be the responsibility of the chairman of each function to convey reserved tables requests to the Conference Chairman. The Conference Chairman, in turn, shall confer with the President and Executive Director. Reserved spaces other than those listed should be approved by the President and Executive Director.

## **Council Meal Function**

**The NAEOP Council Chairman, in coordination with the Conference Chairman, will ensure physical space and necessary arrangements for all council meal functions.**

- A. Council Chairman will be responsible for their respective council meeting, the program, and presenters. Funds are not available for honorariums for council speakers, AV, etc. Speakers attending the meal will be responsible for their own ticket.
- B. Each Council Chairman who has planned for a speaker or mini workshop during the council luncheon is responsible for completing and submitting PSP Application for Approval of In-service Training Program, form VIII to the PSP Registrar no later than four weeks prior to the event.
- C. Each Council Chairman providing a speaker or mini workshop at the council ~~luncheon~~-meal function is responsible for generating an appropriate certificate for each participant that includes all information required as documentation for use on PSP forms IIIa and IIIb. No certificate is to be given if form VIII has not been submitted to and approved by the PSP Registrar.

## **Awards Banquet**

- I. The PSP Committee Chairman and the Awards Committee Chairman, in coordination with the President, Executive Director, and the Conference Chairman, are responsible for the planning of the program.
- J. The official conference photographer will take PSP photographs at rehearsal. During the PSP rehearsal, the PSP Chairman will work with the magazine editor to organize groups for pictures of the PSP Governing Board, PSP Committee, and specific recipient certification groups.
- K. The Awards Committee Chairman will ensure the program will include presentations of the Educational Administrator of the Year Award and the Olive T. Ritchie Educational Office Professional of the Year Award (which is presented last).
- L. Special recognition by the Awards Committee Chairman will be given to past recipients of both awards who are present.
- M. Olive T. Ritchie, Past President and founder of the awards program (or her representative) will present a medallion to the Educational Office Professional of the Year.
- N. Space should be reserved for nominating associations, family members of the award recipients, and past recipients of the Educational Office Professionals of the Year award.
- O. Other awards may be presented during this time with the prior approval of the President and Executive Director.
- P. An additional \$2.00-\$2.50 will be added to the price of each ticket to provide for the expense of decorations.

**Responsibilities of the Installation Banquet and Reception Committee Chairman will be to:**

- A. Choose two or three menu options.
- B. Choose an inspiration.
- C. Plan appropriate table decorations for the theme using the \$2.00 added to the price of each ticket to cover expenses. Work in conjunction with the President Elect and the installing officers.
- D. There will be a no-host hospitality time preceding the banquet.

**Print Coordinator**

**Responsibilities of the Print Coordinator**

- A. Assign an individual(s) to copy certificates from templates provided by the National Office.
- B. Assign an individual(s) to print tickets for all functions (institute sessions, box luncheons, briefings, banquets, etc.) per template provided by National Office. Recommendation is that the same color for meal functions not be used. Meal tickets may be printed with name badges by the National Office, check with Executive Director prior to printing

**Printing**

**Responsibilities of the Printing Committee are:**

- A. Coordinate with the Meal Functions Chairman and Executive Director a plan for placing reserved signs when needed.
- B. Signs for registration table, workshop rooms for Institute and briefings, hospitality room, membership, PSP, Foundation, retirees and exhibitors.
- C. Printing certificate of attendance and other items as needed. Check with Executive Director on other items needed. National Office may provide templates for items.

**Proceedings Coordinator**

**Responsibilities of the Proceedings Coordinator**

- A. Work with Advisory Council Chairman on needs for the Advisory Council event.
- B. Assign an individual(s) to be in charge of ironing the state flags and work with President for rehearsal for flag ceremony.
- C. Designate a person to assure the NAEOP banner(s) is in the correct location for

all meetings during the Conference. The banner is available from the National Office and must be returned to the Executive Director at the conclusion of the Conference.

- D. Be responsible for the nameplates (provided by the National Office or President) and reserved seating arrangements for individuals not seated at the head table. The President will approve the reserved seating arrangements. Chair covers may be used for officers and Past Presidents.

## **Registration Coordinator**

### **Responsibilities of the Registration Coordinator are:**

- A. With the assistance of the Conference Chairman and Executive Director purchase a Conference pin for each registrant at a cost not to exceed \$2.00 per pin. The cost of these pins is a budgeted item. Conference pins are optional.
- B. Purchase a Conference bag from the National Office for each first timer registered at a cost determined by National Office. The cost of these bags is a budgeted item. All other attendees will be instructed to bring their bag from the previous year, or purchase one from the National Office at the determined price.
- C. Adequately staff the registration desk at all times. A courteous, friendly atmosphere is most important at the registration tables. Have a printed list of instructions for workers.
- D. Develop registration lines by dividing alphabetically those who have pre-registered and provide a separate line for those who have not pre-registered. Separate lines should also be maintained for tour and meal function ticket sales and other special events.
- E. If there is on-site registration, tables and chairs should be provided for attendees to use as they complete forms.
- F. The registration staff should know all there is to know about the Conference and be able to answer any questions that may arise and how to handle problems (especially anything regarding payment of fees). It is often helpful to have a "floater" staff member at the registration table who can deal with problems so that other guests are not delayed.
- G. Before attendees leave the registration area, review and verify the contents of the registration packet. Attendees should sign or initial the registration check list provided by the National Office to indicate their packet contained the correct items.
- H. Don't encourage attendees to linger at the registration desk. Provide all the information they need in their packets or have a table near the registration desk that contains brochures that may be of interest. That area should also be staffed with well-informed people who are genuinely interested in making the attendees feel welcome.

### **Registration Committee Chairman Checklist:**

- A. Tables and chairs for registration
- B. Directional signs
- C. Message Board with easel
- D. Registration Packets
- E. Information on attractions
- F. Information on nearest drugstore, grocery, laundry, restaurants, cost of bus service to local sites, shuttles, church starting times, florist, etc.
- G. Committee Chairman list

### **Social Coordinator**

#### **Responsibilities of the Social Coordinator are:**

- A. Assign an individual(s) to be in charge of hospitality
- B. Assign an individual(s) to be in charge of airport or hotel greeters (optional)
- C. Assign an individual(s) to be in charge of exhibitors
- D. Assign an individual(s) to be in charge of door prizes
- E. Assign an individual(s) to be in charge of the morning walk

### **Guest Activities (Optional)**

#### **Responsibilities of the Guest Activity Committee are:**

- A. Plan a guest meal or activity.
- B. Be available to assist guests for the week and aid in arranging activities if needed.
- C. Provide local tourism brochures.

### **Hospitality**

#### **Responsibilities of the Hospitality Committee are:**

- A. Assign one or more individuals to greet participants as they arrive and answer their questions, thus enabling those assigned to the registration tables to register without interruption.
- B. Adequately staff for the Hospitality Room.
- C. Arrange for snack foods and beverages.
- D. Arrange for door prizes by contacting firms, individuals, etc... Door prizes may be wrapped or unwrapped. The committee should work out an arrangement for the drawing of door prizes prior to the beginning of the Conference. Confer with the Conference Chairman and Executive Director before implementation.

- E. Arrange for small items donated from vendors and merchants for attendees to be picked up if they wish.
- F. Arrange for emergency supplies: band aids, safety pins, etc.
- G. An accurate list should be kept of names, addresses, and items donated. This list should be provided to the Conference Chairman. A thank you letter co-signed by the Hospitality Committee Chairman and the Conference Chairman should be written to each contributor.
- H. Be hospitable at all times. Keep the climate warm and caring: be visible at all times.
- I. Post schedule outside room and at registration area of times room will be open.

## **Morning Walk**

### **Responsibility of the Morning Walk Committee is:**

- A. Lead those who wish to exercise on a morning walk.
- B. Arrange area for walk and post information at the registration area on time and meeting place to begin walk.
- C. Be aware of emergency needs of walkers. Carry cell phone for emergencies and have contact info as needed.

## **SUGGESTED TIMELINE**

### **Eighteen Months**

- Present tentative budgets, program content and timelines for the Annual Conference and Institute to be included in agenda information for Board of Directors for the Winter Board Meeting.

### **Twelve Months**

- Present final budgets, program content and timelines for the Annual Conference and Institute to Board of Directors at Board Meetings.
- Present final invitation to the general membership at the Conference.
- Distribute promotional materials at the Conference.
- Host fund-raising table at the Conference (if applicable)
- Design hostess identification (if desired)
- Design Conference pin (optional)

### **Eleven Months**

- Submit promotional article to the magazine editor for the fall issue of the

magazine.

- Obtain a list of the Board of Directors and committee assignments for planning
- Obtain names/addresses/telephone numbers/email addresses of past and future conference chairmen for communication purposes (if desired).
- All conference expenditures must be submitted to the Executive Director.

### **Ten Months**

- Meet with the core planning committee.
- Report to the planning committee suggestions and recommendations from the President, Executive Director and Board of Directors.
- Incorporate the current President's theme in all conference planning with the exception of the installation which uses the President Elect's theme.
- Confirm keynote speaker, institute instructors, and all other speakers providing them with pertinent information regarding dates, times, location, etc.
- Finalize all tours.
- Submit a registration form/final program for the conference and Institute to the Executive Director for the winter issue of the magazine. Receive from the magazine editor/Executive Director a proof copy prior to printing for review.
- Request photography needs from the President, President Elect, Committee Chairman, and Foundation President.

### **Nine Months**

- Communicate with conference committee chairmen to review and monitor progress. Provide the President and Executive Director with updates on planning.
- Plan decorations for all conference functions except installation unless directed to do so by the President Elect.

### **Eight Months**

- Communicate with conference committee chairmen to review and monitor progress.
- Provide the President and Executive Director with updates on planning.

### **Seven Months**

- Communicate with conference committee chairmen to review and monitor progress.
- Provide the President and Executive Director with updates on planning.
- Submit conference updates/changes to the President, Executive Director and NES Connector editor for the spring issue of the magazine.

### **Six Months**

- Request AV equipment needs and room set-up preferences from keynote speaker, institute instructors and other workshop/briefing speakers.

- Order Conference pins (optional)
- Conference Chairman provide update for Winter Board Meeting (they can attend if possible).

### **Five Months**

- Confirm conference photographer with Executive Director.

### **Four Months**

- Meet with all committee chairmen to assure that Conference and Institute planning is on schedule.

### **Three Months**

- Assign one hostess to the President and one hostess to the President Elect.
- Contact future conference chairmen to determine their needs for promotion sales, etc.
- Submit a draft of the program covers and contents to the President, President Elect, Executive Director and NAEOP Committee Chairman for approval.
- Pre Con Meeting with hotel staff to:
  - Review the contract and report any changes to the Executive Director
  - Confirm suites for the President and President Elect
  - Check registration area.
  - Review menus, room assignments, breakout sessions, and room set-ups.
  - Provide hotel with rooming list of Board of Directors, VIPs and Institute presenters (Executive Director will provide the list to the hotel and confirm details)

### **Two Months – One Month**

- Meet with the planning committee to assure everything is finalized and ready to go.
- Follow up on AV equipment request and room setup from keynote, institute instructors and other speakers.
- Prepare a list of all donors and thank you letters to be sent after the Conference and provide a copy of the list to the President and Executive Director.
- Notify President, Executive Director, Board of Directors, keynote speakers, institute instructors and other speakers and committee chairman of any changes.
- Assemble packets/goodie bag

### **Three Weeks – Two Weeks – One Week**

- Confirm that all printed materials, including meal function programs, are in the hands of the Registrar and the committee.

### **One-Two Days**

- A meeting with the President, President Elect, Executive Director, Conference Chairman, Institute Chairman, Presidential Advisor(s), key hotel/convention center staff and others invited by the president and/or conference chairman to review plans and answer questions. Review of Banquet Event Orders will be done with final revisions given at this time.

NOTE: All bills must be submitted for reimbursement by August 15 following the end of the Conference.

## **SUGGESTED DAILY CONFERENCE 4-DAY SCHEDULE**

The following schedule is the traditional 4 day schedule for the Annual Conference and Institute. Any deviation from this schedule must be discussed with the Executive Director and President who will present any changes to the Board of Directors for final approval.

### **Day 1 of Pre-Conference**

1. Pre Con Meeting  
A meeting with the President, President Elect, Executive Director, Conference Chairman, Institute Chairman, and key hotel/convention center staff to review plans and answer questions. Review of Banquet Event Orders will be done during this time with final revisions given at this time.
2. Tours may be available

### **Days 1-2 of Pre-Conference**

1. Board Members will arrive
2. Tours may be available

### **Day 2 of Pre-Conference**

1. ~~PRO~~, Foundation, PSP Governing Board and Executive Board meetings. The President of NAEOP is responsible for the Executive Board meeting which is usually held late afternoon or evening. The meeting is usually held in the President's suite or in meeting room if needed.
2. Tours may be available.

### **Day 1 of Conference**

2. Board of Director's Meeting – the meetings will be held by the current Board of Directors and by the incoming Board of Directors. The new board will meet officially the following day.
  - A. Responsibilities for the Conference Chairman relating to the Board of Directors' meeting are to:
    - i. Help assist Executive Director and Presidential Aide on setup of room assigned. A podium and microphone must be available at the head table for the President. The room should be one which can be locked during the hours the Board is not in session.

- ii. Arrange for water and glasses to be provided on the board tables or in an assigned area.
  - iii. Coordinate refreshments/meals with the Executive Director.
  - iv. Lunch for the Board is a responsibility of each board member. The hosting association may arrange meals for the board members in the hospitality suite if possible. Any plans made should be coordinated with the Executive Director and President. These meals would not be a conference expense.
  - v. A special board activity for the evening may be planned in conjunction with the Executive Director and President.
3. Tours available for members.
  4. Retirees' Tour – the Conference Chairman will arrange a tour of interest to the retirees after consultation with the President of NAREOP.

## **Day 2 of Conference**

1. Institute Classes
2. Retirees' Annual Meeting and breakfast in the morning.
3. Retiree's Service Project in the afternoon.
4. Briefings
  - a. Briefings are 90 minute sessions offered to attendees for the purpose of giving them basic information regarding a specific topic. Briefings are presented by current and past board members and individuals from the general membership if possible.
  - b. The Institute and Briefing Chairman, in cooperation with the Professional Development Committee Chairman, President, and Executive Director is responsible for planning briefings and the institute.
  - c. The number of briefings offered will be determined by available meeting room space.
  - d. The final schedule will be approved by the President and Executive Director and presented to the Board of Directors as an informational item twelve months prior to the conference.
  - e. The Professional Development Committee Chairman will submit the final schedule of briefings to the Conference Chairman and coordinate special requirements for the briefings.
  - f. All non-board member briefing presenters will receive a \$25 stipend per briefing presented. Current board members and those receiving compensation for duties from NAEOP will not receive a stipend. This is a budgeted item and provided for briefing presenters only.
  - g. AV needs are to be kept to a minimum, which means podium and standard microphone for over 25 in attendance in the meeting space.

## **Day 3 of Conference**

- 1 First Timer Advisory Council Delegate Meeting
2. Advisory Council Meeting
  - A. The President will introduce the Advisory Council Chairman who will preside during the meeting.
  - B. The NAEOP Parliamentarian will serve as the Advisory Council Parliamentarian.
  - C. The National Office will keep the Conference Chairman and the Advisory Council Chairman informed of the number of delegates expected to attend.
3. Exhibits and Special Projects open to the members
4. Council Meal Function
5. Second General Session
  - a. Annual NAEOP Business Meeting
  - b. Membership Chairman and the Credentials Committee are responsible for membership verification and count as participants enter the room.
  - c. Head Credentials Chairman will establish a quorum for each General Session. This information is given to the Membership Chairman.
6. Foundation Meeting
  - a. There will be an NAEOP Educational Foundation Annual Meeting during the NAEOP Annual Conference. The Annual Conference will be recessed during the Second General Session for this meeting. The President of the Foundation will preside at the Annual Meeting of the Foundation. The Marion T. Wood Member Scholarship and the Mona Smith Member Dependent Scholarship are awarded during this meeting.
  - b. The NAEOP Parliamentarian will serve as the parliamentarian for the Annual Meeting of the Foundation.
  - c. The agenda for the meeting will be determined by the President of the Foundation.
  - d. The appointed pages, tellers, monitors, credentials committee, timekeeper and others as needed, will carry out the functions of the Educational Foundation Meeting.
7. Awards Banquet

## **Day 4 of Conference**

The NAEOP Area Chairmen, in coordination with the Conference Chairman, will ensure physical space and necessary arrangements for all area meal function.

1. Meeting Meal Function
  - A. The Area Chairmen, in coordination with the Conference Chairman, will

- ensure physical space and necessary arrangements for all area meeting meal functions.
- B. Individual Area Chairmen will be responsible for their respective area meetings.
  - C. Elections of the necessary committee members will take place during the Area meal functions. Results will be tallied and given to the NAEOP Secretary/Treasurer or designated National Office staff as quickly as possible.

#### General Session #3 (continued)

- A. Annual NAEOP Business Meeting, continued.
- B. Membership Chairman and the Credentials Committee are responsible for membership verification and count as participants enter the room.
- C. Head Credentials Chairman will establish a quorum for each General Session. This information will be given to the Membership Chairman.

#### General Session #4 (if needed)

- A. Continuation of NAEOP Annual Meeting if needed.
- B. Presentation of awards if needed.
- C. The Affiliate Chairman and Membership Chairman, in coordination with the President, Executive Director and the Conference Chairman, are responsible for this function if awards are presented at this meeting.
- D. The program may include the presentations of the following awards if not presented at the Awards Banquet:
  - 1. Presentation of the Rachel Maynard Excellence in Communications Awards (Immediate Past President)
  - 2. Presentation of the Website Awards (Awards Committee Chairman)
  - 3. Presentation of the Louise Henderson Nelson awards (Awards Committee Chairman)
  - 4. Presentation of the Marion T. Wood Student Scholarships (Scholarship Chairman)
  - 5. Presentation of the membership awards (Membership Chairman)

#### **Day 1 Post Conference**

Post con meeting with approved conference Co-chairs (current and future) and Institute/Briefing co-chairs (current and future). This meeting may be done at a later date via conference call.

Post conference tours as applicable.

### ***Top Words of Wisdom from Planners***

Success comes from applying basic principles like honesty, organization, and flexibility.

Teamwork is the single most important ingredient for a successful meeting.

Buy lots of Tylenol – take lots of vitamins!

Change is the only thing that offers new opportunities.

Put yourself in the shoes of the attendees.

Always have a backup plan – or two!

No matter how meticulously you plan, you can never please everyone.

Focus your attention on emerging technologies.

Customer service first, last, always.

Things will go wrong - but it's important that only a few core people know it!