



Alpha Phi Omega

National Service Fraternity

Conference Planning Guide

Spring 2001

Conference Planning Guide

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I. INTRODUCTION

Congratulations! You have been selected as the Conference Chair for your next Sectional or Regional Conference. It is an opportunity to use your leadership skills for a wonderful cause. Planning a conference is one of the most beneficial “Service Projects” to the Section/Region that any one person can lead, but you are not expected to accomplish this task alone. All great leaders learn to draw upon their resources and formulate a game plan strategy before delegating any duties or promising anyone any positions.

The Conference that you are to Chair should incorporate the desires of the Section/Region as well as your personal flavor and style. You should first take a look at this “Conference Planning Guide” and then call your Sectional Chair (if Sectional Conference) or Regional Director (if Regional Conference) to get an idea of what their expectations are. It is a good idea to confirm the date, time, location and length of the conference with the Section Chair or Region Director and their respective conference responsibility.

The guide and Appendix A (see page 8) is designed to get you started on your new task. You should review evaluations of previous Sectionals/Regionals (see your elected official). Feel free to adjust any portion you like to fit the needs of the conference. By keeping communication clear from the beginning, you will find the experience rewarding and educational. Keep a positive attitude at all times and know that you have many resources willing to help. . . just ask.

The promotion of the conference will take a concerted effort of your chapter and your committee. Remind them that this is “their” conference. Some of the factors that you may need to help overcome, since other Chapters are involved, include: school stress (exam week), school breaks, other major functions, costs, location, cultural observance times, and for some, a new experience. You and your committee will find creative ways of overcoming some of the “barriers” encouraging early fund-raisers (other Chapters and host Chapter), going to visit other Chapters and effective usage of your resources with “wish lists” to name a few.

Good luck on your new adventure!

II. WHY A CONFERENCE?

A conference allows you to assemble college students in a “setting” that increases the opportunity to share ideas in developing leadership, promoting friendship, and providing service. In addition, it helps to build the infrastructure of our National Fraternity by increasing communication.

III. WHAT TYPES?

A. Sectional Conference Planning must be approved by the Sectional Chair/Regional Director

1. Coordinator is usually an Active Brother.
2. Sectional Conference Advisor is usually a Chapter Advisor.
3. Program ranges from one day to three days.
4. Business - main focus is election of Sectional Chair (every year per National bylaws), educational workshops and programs.
5. Fellowship - main focus is getting members together, banquets, dances, and icebreakers.
6. Service - main focus is a larger scale service project and communicating with other Chapter members.

B. Regional Conference - must be approved by the Regional Director

1. Coordinator-Regional Conference Chair is usually an Active Brother.
2. Regional Conference Advisor is usually the Chapter Advisor, determined by the Region Director.
3. Programs may range from two to four days, similar to a Sectional Conference.

C. National Convention (National Executive Director oversees and supports)

1. National Convention Chair is usually an Active Brother.
2. National Convention Coordinator is usually an experienced alumnus of the Region.

IV. ASSEMBLING YOUR COMMITTEE

It is essential that you begin to consider matching the talents of Brothers to the needs of some of the sub-committees. In selecting a quality team, you will need to convey “your visions of the conference” and feel comfortable in empowering them to carry out the task. It will be handy for you to carry a separate binder to organize your paperwork. Encourage each of your sub-committee chairs (after you have selected them) to coordinate their own committees. Involving more people in the planning stage helps to guarantee a greater attendance and more informed Brothers. You will find that “brainstorming” is an excellent method of getting everyone involved.

IV. ASSEMBLING YOUR COMMITTEE (cont'd)

- ◆ Set up a meeting with your whole committee (invite the Sectional Chair or Regional Director).
- ◆ Decide the goals of the committee (i.e.: x percentage of attendance in the region, x amount of attendees, x amount of leadership program, business meeting under one hour, etc.).
- ◆ Agree to work together and be accountable.
- ◆ Discuss the theme of the conference.
- ◆ Discuss the length of the conference, taking into account members traveling to and from.

V. CONFERENCE PLANNING COMMITTEE

A. **Facilities** - Location and cost (hopefully free). According to the National Board policy, any contract that needs to be signed will need “official” approval. See your Region Director for guidance unless it is on Campus premises and the Faculty Advisor is responsible.

1. Meeting rooms - what size, how many, where are they located, noise, lighting, flow, accessible?
2. Sleeping arrangements - floor space, beds, motels, hotels, dorms, cost, convenience .
3. Remember to allow reasonable time for those attending your conference.

B. Programming

1. **Schedule** - A Sample Conference Agenda is in Appendix B (see page 10).
 - a. **Opening Meeting** - the purpose of this event is to review the program with attendees and explain the ground rules of the conditions for the conference. Opening remarks from an elected official.
 - b. **Business Meeting** - establish time needed from the Sectional Chair or Regional Director. Section Chair election, next sectional conference location and time, and any issues of the Section, Region or Nation. Work out logistics for ballot counting, if necessary.
 - c. **Information Exchange** - announcement of important dates, Chapter reports, service project exchange (National Service Week updates).
 - d. **Workshop Breaks** - Be sure to allow adequate breaks between workshops, seminars and before banquets.

V. CONFERENCE PLANNING COMMITTEE(cont'd)

2. Educational Workshops

- a. Let presenter know of the physical arrangement of setting, (theater style, classroom, fixed benches, seating of 10 to 100, etc.)
- b. Have "hosts" give a prepared introduction of the presenters before their workshop begins.
- c. Confirm presenters at least two weeks in advance to assure they know where to go. Find out if any special items and/or equipment is needed (flip charts, tape, markers, overhead). Note: Audio visual support may be a budgetary impact or utilize your resources.

3. Special Workshops (National Programs) - Requires advance requests.

- a. Leadership Development Workshop - 6 ½ hour intensive workshop to increase the leadership skills of any Brother.
- b. Fellowship Development Workshop - Approximately a 5-hour workshop to increase the fellowship skills of any Brother.
- c. Modular Workshop - Write the National Office for details.
- d. Chapter Program Workshop - Write the National Office for details.

4. Food - Consideration of dietary constraints, religious observance, etc.

- a. Breakfast - does not need a "cooked" menu. Have hot water for coffee, tea, and hot chocolate; fruits are encouraged. Make purchases at a discount warehouse when possible.
- b. Lunch - can be simple sandwich-type foods, pizza brought in or "on your own." Be careful when you have people leave the location, as it may become a logistical problem staying on schedule.
- c. Dinner - (if any) is usually a banquet with a keynote speaker.
 - 1) Banquets can be costly. Make sure the contract is fair and can meet dietary restrictions. Also, last minute add-ons (overage) must be decided in the contract. You are responsible for the number of expected attendees on the contract, so try to arrange the food guarantee to be 12 hours before the banquet. Make your food guarantee 10% less than the number you expect for plate dinner meals. Other options: buffets, other restaurants, barbecues, pot luck style, pizza, etc.
 - 2) A program should be prepared and strictly adhered to, including keynote speaker, invocator and announcements.

5. Entertainment - A great way to break up the monotony!

- a. Off-site amusement - check on liability, age limitations and necessary insurance.
- b. On-site amusement - board games, cards, dance, new games, etc.

6. Service Project - Made to be flexible to size of group, convenient and enhances the conference. May need to work with finance committee if budgetary impact.

V. CONFERENCE PLANNING COMMITTEE(cont'd)

7. **Souvenirs** - Make sure you have a good cost analysis in terms of quantity orders and you are not “stuck” with extensive surplus. (Note: Should you consider custom lapel pins, you can contact your Section Chair or Region Director for the contact at the National Office).
 - a. You will need to work with the Finance Committee for the budgetary impact.
 - b. Seek bids to obtain the lowest cost.
8. **Awards** - There are usually some serious awards (i.e. to presenters, to coordinators, special recognitions, planning committee, key people) along with some fun awards (i.e. Chapter traveling farthest, most unique method of arriving, most enthusiastic chapter) or any other awards the committee may deem necessary.
9. **Finances** - Oversees the income and payables of the conference totally separate from the Chapter's expenses. See Sample Working Budget in Appendix C (page 11). You must keep a good record with receipts and a final report is necessary at the conclusion of the conference. Budget is to be set and approved by the Section Chair (if a Sectional Conference) or Region Director (if a Regional Conference).
 - a. Rules to Budget By:
 - 1) Ask for it for free. This is the time to call in all your favors. Use your advisors, alumni, project contacts.
 - 2) Ask for it for cheap. Mention tax deductible contribution.
 - 3) Never plan to lose money - you may not get it back. Don't plan to make a large profit either - you can't keep it. Aim for a small profit or break even.
10. **Public Relations** - have your Chapter set a good example, get commitments early and advocate conference fundraising events to offset costs in your Chapter and other Chapters. The up front costs are usually incurred by the host Chapter and reimbursed if the final budget is positive.
 - a. External
 - 1) Have a “complete” list of those you intend to invite. Don't forget about Interest Groups, Petitioning Groups, new Chapters, your Advisors, volunteer staffers, Alumni and guests that your committee may decide on.
 - 2) You should plan a minimal of two mailings to invite people to “their” conference:
 - (a) The first one may be just a reminder packet that gives an overall general idea of what is offered, estimated cost, time and when the next packet with specific information is coming out, including tentative deadline for response OR it may be a survey of the desires of the Chapters.
 - (b) The second packet should have a more comprehensive schedule with lists of activities, time, food plans, map (conference site, parking, housing) and contact numbers. Indicate how the checks are to be made out and the fee structure (late fees after certain date, if any) and where to send (or provide self addressed envelope.) Reminder phone calls or postcards are also good ways to encourage people. You may want each “Chapter” to have a specific contact person (liaison) to relay information.

V. CONFERENCE PLANNING COMMITTEE(cont'd)

- (c) You can save costs by giving the copies to the Section Chair and Region Director to include in their mailers.
 - (d) Convention Packets - if needed. Include: welcome letter by the elected officials, the conference coordinator, school or local official, schedule, campus policy, alcohol policy, conduct, map of food areas, ATM's, city highlights, important local numbers/emergency numbers, evaluation of conference and other items you wish to include.
 - (e) Chapter visitations make a personal and lasting impression. Bring a group if possible.
 - (f) Have announcements read at all inter-fraternity functions, including e-mail.
 - (g) Pictures for Scrapbook/Torch and Trefoil.
- b. Internal
- (a) Keep the host Chapter members informed and participating.
 - (b) Calls to the Section Chair/Region Director to remind their staff.
 - (c) Calls and reminders to the Advisors.
 - (d) Flyers, posters, presentations.
 - (e) Getting coverage from the school newspaper/radio.
 - (f) Phone tree-functional/ e-mail lists.
 - (g) Chapter liaisons to call on a routine basis to assist the PR process.
 - (h) Communication: walkie talkie, pagers and cellular phones for the day of event, if needed. Definitely have backup contact numbers so that last minute arrivals may talk to someone who knows the situation.
 - (i) T-shirts, caps, buttons, stickers, etc.

VI. GUESTS

- A. If you chose:
1. Person to do invocation.
 2. Keynote speaker (remember to give time limit and topic).
 3. National Board Member and/or other elected official.
 4. Community leader.
 5. Faculty advisor.
 6. School official.
 7. Other presenters.
 8. International member(s) of Alpha Phi Omega.

Special Note - One mailing will **not** make for a successful conference. You will have to call Sectional and Regional leaders, Chapter and Alumni Associations.

The National President or National Vice President will attend the regional conference so make sure they receive a personal invitation with an agenda and a brief explanation of what you want them to do, i.e. conduct a workshop or be the banquet speaker.

APPENDIX A**SAMPLE WORK SCHEDULE TIMELINE/CHECKLIST**

ACTUAL DATE	BY DATE	ACTIVITY	RESPONSIBILITY OF	COMMENTS
	9 months	-Review Conference Planning Guide -Set location and date(s) -Announcement (post card) to Chapter to hold date(s) open	Conference Chair	
	8 months	-Set meeting with Section Chair or Region Director -Get mailing list from SC/RD -Review previous conference evaluations	Conference Chair	
	7 months	Key Sub-Chair selected	Conference Chair	
	6 months	Select conference theme	Committee	
	5 months	-Budget finalized/fundraising begins -First Mailing w/Survey	Committee & SC or RD	
	4 months	-Banquet guests/speakers invited -Facilities finalized -PR program instituted -Visitations & calls		
	3 months	-Housing accommodations made -Service project arranged -Invite Invocator/keynote speaker		
	2 months	-Second mailing packet -Banquet location/program -Order materials from National Office (life membership)		
	45 days	Promotion team makes personal contact and gets "head count"		
	30 days	-All facilitators finalized— welcome letters/draft program		
	15 days	-Promotion team makes another contact to Chapters -Finalize program/make copies		
	7 days	-News release -Registration Packet assembled -Decorations/supplies		
	5 days	Banquet Contract & Food		
	THE DAY	CONFERENCE DAY! -Evaluations/conference wrap-up with committee	EVERYONE	
	2 days after	-Send "thank you" notes		
	7 days after	-Finance report completed -Conference summary completed		

APPENDIX B

SAMPLE CONFERENCE AGENDA

(For a 3-Day Business Conference)

FIRST DAY

7:30 - 10:00 pm Registration (snacks available?)
8:00 pm - 1:00 am Social event

SECOND DAY

7:00 - 8:00 am Registration (continental breakfast provided?)
8:15 - 9:00 am General Opening Session
9:15 - 10:15 am Seminars (*choose one*)
 a) How to Plan National Service Day
 b) How to Attract Quality Members

10:15 - 10:40 am Break

10:45 - 11:45 am Seminars (*choose one*)
 a) Improving your Image on Campus
 b) Making Service Projects Fun

Noon - 1:25 pm Lunch

1:30 - 2:25 pm Seminars (*choose one*)
 a) Membership Education for a Growing Chapter
 b) Fellowship Programs Made Simple

2:30 - 2:45 pm Break

2:50 - 3:45 pm Seminars (*choose one*)
 a) How to Run an Effective Meeting
 b) How to Plan a Public Relations Program

3:50 - 5:15 pm General Session
6:30 - 8:00 pm Banquet
8:00 pm - Midnight Dance

THIRD DAY

9:00 - 9:55 am Breakfast
10:00 - 10:55 am Closing Session/Evaluations
11:00 am - Noon Committee Wrap-up

** All seminar topics noted on this page are examples only.*

APPENDIX C

SAMPLE WORKING BUDGET

On a separate sheet, have your committee list out all the materials, supplies and costs they can think of. You will find there are two areas of cost: Fixed Cost (like room rental, awards, equipment rental) and Variable Cost (like mailings, food costs, copy per packet). Now figure out what resources can help offset some of the costs, like donations from the community, alumni, and friends. Take the estimate of likely attendance (better to be conservative) and divide into the Total Expenses (not including banquet) to arrive at the registration cost. The banquet cost should always be considered separately.

Expenses:

Variables

- Postage \$ _____
- Postcards \$ _____
- Printing \$ _____
- Stationary \$ _____
- Telephone \$ _____
- Registration Packets \$ _____
(Pen, paper, map, folder, name tag)
- Souvenirs \$ _____
- Meals _____ @ \$ _____ = \$ _____
(make sure no minimal paid dinners)

Fixed

- Room Charges \$ _____
- Phone Reimbursement \$ _____
- Audio Visual \$ _____
- Photo: Film/Developing \$ _____
- Fellowship Items/ \$ _____
- Equipment \$ _____
- Contingency \$ _____
- Complimentary \$ _____
(i.e., presenters, special guests, include meal costs)
- Miscellaneous \$ _____

Expense Total: \$ _____

Income

Early Registration	_____ @ \$ _____	=	\$ _____
Late Registration	_____ @ \$ _____	=	\$ _____
Meal Banquet	_____ @ \$ _____	=	\$ _____
Donations	_____ @ \$ _____	=	\$ _____
Fundraisers	_____ @ \$ _____	=	\$ _____

Income Total: \$ _____

The budget must **BALANCE**. This means that the total of your expenses must be equal to the total of your income. A conference should not be planned as a profit-making venture, unless every Chapter in your area agrees to this in advance.

APPENDIX D

SAMPLE CONFERENCE EVALUATION*

SECTION _____ REGION _____ DATE _____

Thank you for attending this conference. To allow us to continue improving our program, please help us by filling out this Evaluation Form and add constructive criticism where appropriate. Use the reverse side if necessary.

1. I found the advance publicity about the conference to be:
Excellent_____ Good_____ Fair_____ Poor_____
2. The registration process when I arrived was handled:
Excellent_____ Good_____ Fair_____ Poor_____
3. The housing accommodations were:
Excellent_____ Good_____ Fair_____ Poor_____
4. Please rate each seminar that you attended and write constructive criticism for each:

Rating Code: Excellent=1 Good=2 Fair=3 Poor=4 Not Attended=N/A

<u>Rating</u>	<u>Seminar</u>	<u>Comments</u>
_____	How to Plan National Service Week**	_____
_____	How to Attract Quality Members	_____
_____	Improving Your Image on Campus	_____
_____	Making Service Projects Fun	_____
_____	Membership Education for Growing Chapter	_____
_____	Fellowship Programs Made Simple	_____
_____	How to Run an Effective Meeting	_____
_____	How to Plan a Public Relations Program	_____

5. The seminar topics I would like to see at the next conference are:

6. The food was:
Excellent_____ Good_____ Fair_____ Poor_____

(SEE REVERSE SIDE FOR SUGGESTIONS)

[illegible]

[illegible]

*THIS EVALUATION FORM IS TO BE USED **ONLY** AS AN EXAMPLE. YOU MAY CUSTOM
MAKE ONE TO MEET YOUR OWN NEEDS, OR IF YOU WOULD LIKE TO SUBMIT A MORE
SUITABLE EVALUATION FORM, CONTACT THE NATIONAL EXECUTIVE DIRECTOR,
E-MAIL: aponed@aol.com

****SEMINAR TOPICS ARE ALSO *ONLY* EXAMPLES.**