

## HOW TO PLAN AND ORGANIZE AN OHIO IAWP SPRING INSTITUTE OR FALL CONFERENCE

Organizing, planning and participating in an Ohio IAWP Spring Institute or Fall Conference can be one of the most rewarding events you can do to serve your chapter. Make sure you take some time just to have FUN. We hope this document will be helpful to you.

### A) When to Plan for Your Bid

Approximately 12 months out is the best time to discuss sponsoring our Ohio IAWP Chapter Institute/Conference. Remember you will need to coordinate with your Sub-Chapter, District Representative, State Officers and State Board.

This is also a "good" time to begin forming a Steering Committee to handle the start up items (date/time/location)

When selecting your group, emphasis should be placed on willingness to work, rather than on rank and position. Create a blend of senior IAWP members, with experience, and some "new blood" members and/or non-members, retirees, One-Stop Partners (members and/or non-members). Your Agency Director and your Ohio IAWP leadership should respect this group. In addition, you must have the support of your Sub-Chapter and surrounding One-Stop offices membership, as they will be needed to make your conference a success.

Contact your One-Stop partner agencies and leaders in other sub - chapters and ask them what they think of your idea and would they consider supporting your bid at the proper time. Recruit a number of your members that will be attending the next Ohio IAWP Statewide conference to contact the various board members and try to find out what your chances are if you decide to throw your hat into the ring the following year. Also find out if other sub - chapters have similar thoughts so that you can plan your strategy accordingly.

Upon return from the conference, a meeting should be held with those members who attended the conference. Discuss the experiences and if more positive feelings than negative feelings for your plans were demonstrated, you can decide to go ahead with your bid.

### B) Planning the Conference

One of your first steps is to select a Local Arrangements Chair(s) - (LAC). This is a very important selection as the success of the Conference may depend on this person.

Immediately upon your return from securing the approval from the Ohio IAWP Board, your work begins. Up to now, it's been ideas, suggestions and concepts. You need to turn them into plans with intention to carry them out. One year may seem like a long time, but you won't think so when you look back at it. Your proper planning and preparation will repay itself many times in a smooth and professional effort. Former Conference chairs or planning committee members will be a good reference.

If you have not yet reached an agreement with a hotel - YOU MUST DO SO NOW.

Once the selection is made, you and the LAC can begin organizing the needed committees and selecting their chairpersons. It is understood that all chairpersons are capable of performing their assigned tasks and are aware of the committee's duties and responsibilities. No committee can function as a separate entity and all committees must coordinate their activities with the LAC to accomplish the goal of conducting a successful Conference. A suggested list of general duties of all committee chairpersons might be as follows:

1. Organize the committee into a functional organization that will accomplish the assigned mission. Make sure all members know their assignments.
2. Prepare a proposed budget to cover the non-borrowable items needed by the committee. The budget is to be submitted to the LAC for eventual approval.
3. You may want to keep minutes or high points of all meetings for follow-up.
4. Coordinate all needs and/or visits to the Conference facilities with the LAC. Too many workers trying to deal directly with hotel can create a great deal of confusion.

A suggested list of committees and their responsibilities are as follows:

#### 1) Local Arrangements Chair(s):

The local Arrangements Chair(s) is the most vital person(s) on the committee. He/she sets date, time, location and theme for the event. It would be helpful to develop a time line to handle all the various tasks to be completed.

The chair conducts a monthly meeting with the Steering Committee starting four months prior to the event sets the Committee Budgets, serves as the contact with the Hotel, coordinate any sponsors for the conference and

interacts with the Ohio Chapter Board. The chair is responsible for forming partnerships with other employment and training entities (IE - Veterans, Unions, One-Stop Partners, County groups and other IAWP sub-chapters). The Chair is also responsible to report to the Ohio Chapter Board at all meeting. In essence, this person(s) serves as the point person for information on the Conference

The LAC will have the responsibility of making sure all attendees are properly housed. Working with the Hotel, the LAC will devise a hotel registration form.

The LAC is also responsible to issue a "thank you" to the steering committee Speakers and the Hotel.

## 2) Program Chair:

The program chair is probably the second most important person on the Steering Committee. The chair sets the Program, obtains speakers (Bio and Picture of featured Speaker); develops an evaluation form (Conference and Workshops); ensures certificates of attendance are available; obtains workshop coordinators and proper sign age; establishes room set up (table/Mic./podium/water/number of chairs); Set the Opening (OhioIAWPBanner, Memorial candle, Includes Veterans Chair for honor guard and flags); Coordinate IAWP International Speaker/Include Retiree Chair for Retiree Program, include Disabilities Chair for Registration forms (Conference and Hotel) /include Agency Director or Assistant Director for Agency message; works with a central office associate to develop the program; and sets up Master of Ceremony. Ensures "First Time Attendees" are acknowledged - we need to grow! Ensures State Chapter Activity (Board Meeting/Membership Meeting/Silent Auction/50/50 Raffle/Past Presidents Club are planned for in the program). The program chair also works with the Ohio IAWP Cardinal to take photos and an articles on the conference to both IAWP Cardinal and ODJFS NEWS TODAY as soon as the conference ends.

Prepare a budget for review/approval by the LAC

The program chair is the contact person for the entire Program.

## 3) Door Prizes

The Door prize chair is responsible to solicit up to 20 QUALITY Door Prizes to be drawn at any time during the conference. The door prize chair is devise a means to draw names, to secure a location to display the door prizes at the conference and select an appropriate person (Officer or Board Member) to draw the names.

## 4) Fund Raising (IE - Program Book Ads) Chair:

This chair is suggested as a source of raising funds for your sub - chapter. Any income derived from this effort belongs to the sub - chapter. Therefore we leave you to your own devices.

## 5) Luncheon and/or Breakfast Chair:

This chair is responsible for planning, arranging and conducting the Conference luncheon and/or Breakfast.

The committee will work closely with the hotel and/or catering service to select menus. The LAC will approve the cost of meals. After approval, the chair will plan the event (decorations and event flow)

This committee will work closely with the Program Chairperson to determine any seating, special arrangements and/or equipment that may be needed. The committee will have to coordinate its activities with the Registration committee to determine the number to be served. This committee should determine the procedures for collecting tickets, verifying the number served and the method of payment including gratuities to the hotel.

Prepare a budget for review/approval by the LAC.

## 6) Marketing and Publicity

This committee should provide articles, etc., about the Conference to the "Cardinal " editor. Information on the program, registration and hotel (including directions and contact information).

Hotel publicity and reservation forms should be sent out as soon as available. The Ohio Chapter Executive board should be kept well informed. Forward this information to all Board members as soon as possible.

Marketing and Publicity Chair - Always try to use e-mail to Market this event; create all flyers and letters to: ODJFS staff, the Ohio County Department of Human Services Director's Association (contact - John Weber), Ohio

One-Stop Offices staff (contact - Jerry Raffenaud), the Governor's Workforce Policy Board (contact - Sue McKittrick), the ODJFS Apprenticeship Council (contact Jean Sickles), Refugee Council (contact - Mike Hock), UC Advisory (contact - Denise Carque), County ODHS Offices (contact - Robin Rice), County Commissioners (contact - your County Commissioner's Office), select State Agencies (contact - Dwight), all DOL Program Exempts in CO (contact - Dwight), AFL-CIO AFSCME and 1199 Unions [contact Sharon Ralph] and Mahoney County Union - contact Mary Kay Krisman, and Field Office Management (contact - Jerry Raffenaud); Marketing via ODJFS Website at [www.odjfs.state.oh.us](http://www.odjfs.state.oh.us), ODJFS News of the Day [Calendar of Events - reminder box] and IAWP Conference Information site; IAWP Website; OhioWorkforce Connection at [www.ohioworkforce.org](http://www.ohioworkforce.org).

Prepare a budget for mailing charges for review/approval by the LAC

#### 7) Program Book Chair:

The Program Book Chair, set time line for ads, design, layout and printing the program book.

A general outline of the program book would include:

- \*Greetings/Photo from the ODJFS Director/Ohio Chapter IAWP President and Host Committee
- \*List 10 Year Ohio IAWP Members
- \*In Memorial
- \*List of Ohio IAWP Officers - name and title
- \*Host Sub-Chapter Officers - name and title
- \*OHIO IAWP Code of Ethics
- \*Floor plan of host Hotel
- \*Ads
- \*Photo/Bio of Featured Presenters
- \*Agenda
- \*List all Sponsors and /or Thank you page
- \*Other items you feel would enhance our program book

Prepare a budget for review/approval by the LAC.

#### 8) Registration Chair:

This chair is responsible for registering all attendees and visitors to the Conference. This responsibility includes inspecting the hotel location, set the work flow, collection of registration fees and the selling of tickets for meals and/or special functions.

This chair will devise a registration form for distribution to all Ohio IAWP Members and the "Cardinal " newsletter in advance of the Conference. The form should include members, non-member and retiree fees for all events. Most have found no need to include a late charge fee.

The Registration chair is also responsible for name badges for all attendees (Special annotation for First time attendees).

This chair will also receive the program from the Conference Program chairperson for distribution at the time of registration. The committee will prepare the registration packet and should include items such as event tickets, program, souvenirs or gifts, and notices of specials or other information to attendees.

This chair will also: set up a message board, set up a volunteer schedule, and assign Volunteers. Equipment will be secured and the physical layout of the registration area made before the Conference opens. Arrangements should be made with the Treasurer for pick-up of money.

Advance registration will be accepted and this committee will devise a system for it. Advance information should include information on hotel reservations, special events, and registration forms. It is a good idea to have a separate line set up to handle advance registration and have the registration packets prepared in advance.

The chair will prepare a report for the LAC by 9am Thursday of the conference to be read at the Ohio IAWP Board Meeting. Prepare a final report for the LAC.

The registration chair must also prepare a DRAFT Budget for review/approval by the LAC.

#### 9) Social Event Chair (Early Bird):

This chair would be responsible for the Early Bird reception, planning and securing any entertainment needed. The chair would inspect the hotel site to ensure a suitable location is available for the Early Bird. The chair would

also set the theme, menu and decorations. Serve as the liaison with the hotel to handle all arrangements. Prepare one marketing announcement/flyer for this event to be coordinated with the communication chair. The chair may also provide a lists of places to shop, dine and dance.

Prepare a budget for review/approval by the LAC.

#### 10) Treasurer

The Treasurer handles all monies during the on site registration; prepare a report for the Chair(s) by 9am Thursday, to be read at the Ohio IAWP Board Meeting; Prepare a final Report for the Chair(s).

The Treasurer is responsible for banking all monies and for the payment of all Conference expenses. The bank account should have four (2) authorized signature and require two (2) signatures on any withdrawals.

This Treasurer will establish an accounting system that will account for all income and expenditures. Receipts should be required before any payments are made.

This Treasurer will develop the overall Conference budget in cooperation with the LAC and each chairperson.

The Treasurer will work with the Registration committee to develop procedures for banking all monies received for registration or the tickets to activities sponsored by the Conference.

The Treasurer will exercise strict controls over Conference expenditures and not allow non-budgeted expenditures to be made unless the LAC has approved them. The Treasurer will prepare a report for the LAC to present to the Ohio IAWP Board by 9am Thursday of the event at the Board meeting. The Treasurer will prepare a final Report for the LAC within 90 days after the end of the Conference.

#### C) The Conference Hotel

When selecting a hotel to host your Conference, an inspection of the facilities should be made. Do it unannounced and without any hotel staff. Observe some, preferably all, of the following points:

1. Efficiency of the registration procedure and courtesy of the staff.
2. Speed and number of elevators.
3. Service in the restaurant(s).
4. Sanitary conditions of facilities.
5. Cleanliness of hallways, elevators and rooms.
6. General outside surroundings of the buildings.
7. The maintenance and service staff at work.
8. Escalators or other access leading to the meeting rooms?
9. "In house" and nearby parking facilities.
10. A friendly chat with the bartender will often reveal how their staff feels toward big conferences.
11. If possible, visit the hotel while a Conference is in progress.

Notify all hotels, with the potential capacity of being considered, to submit bids for the Conference. Your local Convention Bureau can be of great assistance in the selection process. Be aware that they may not be the best judges of your needs - You Are.

Once you have decided which hotel is best suited for your Conference, negotiation is the next step. Your LAC is important in this process. The negotiation skills of the LAC must be considerable. Remember that in this area, WE are the amateurs. Hotels earn their livelihood through Conference and similar activities. They will have a tendency to protect their "turf" and you must do the same.

The business like approach to negotiations begins with the first meeting. You are the purchaser of services and they are the providers. You know your requirements; the hotel knows their capabilities.

The most difficult data to obtain is how many rooms to reserve or how to estimate your potential attendance. You can start at 2 persons per room and depending on attractions and/or location of your city, adjust up or down. Do not include members from your city, as only a few of them will want accommodations.

Obtain an up-to-date plan of the hotel and the capacity of each meeting room. Your LAC must become familiar with these plans and the location of lighting and sound equipment.

It will save much confusion if right from the beginning, you establish the practice of asking for a detailed bill for each service performed. That may be the hotel or a supplier of goods or services. This could avoid double billing by the accounting department of the party you are dealing with.

Every conceivable effort should be made to insure that the hotel has facilities and entrances for the disabled persons. The entries to the hotel, meeting rooms, banquet rooms and public rest rooms should be accessible to wheelchairs. A certain number of guestrooms should be equipped to handle wheelchairs and bathroom facilities should be equipped to handle all aspects of human needs.

#### 1. Rooms

During your negotiations, you will find that some hotels are quite willing to set a uniform room rental rate subject to minor revisions at Conference time.

#### 2. Equipment

Usually every hotel has all the sound and video equipment needed. It is usually in good working order, but occasionally a problem may arise. Assign a reliable member of committee for such emergencies.

In addition, many hotels have lighting switches, dimmers, etc. in locations remote from the actual room. Familiarize yourself.

Customary practice is that each meeting room is supplied with one microphone and podium without additional cost. We strongly advise you have itemized charges for additional equipment written into the contract.

#### 3) Meeting Rooms

Assure yourself that meeting rooms are soundproof, particularly if walls are movable. This precaution is necessary in the event that two meetings or workshops are being held simultaneously in adjoining rooms.

Should speakers require audio/visual equipment, can the rooms be darkened? Are there adequate electrical outlets? Are extension cords needed?

The following is a list of meeting rooms that are usually needed. Additional rooms may be needed by Convention time. Make sure there is some flexibility in the hotel meeting room arrangement.

- 1.General Meeting - Number of participants varies (50 -100).
- 2.Workshops (if held) - Number of participants varies.
- 3.PDP - If scheduled
- 4.Board Meeting
- 5.Pat Presidents Club

#### D) After the Conference

You are expected to provide a complete accounting of the Conference within 90 days of the close of the Conference. This should give you time to pay all accounts, obtain remittance for any hot checks, and make a complete financial report.

Surplus funds, as a result of the Conference, are to be remitted to the Chapter Financial Secretary. This amount should not include the grant amount provided by the Chapter or any funds raised by your .sub - chapter from any fund raising activities.

Take some time to "pat yourself on the back"

Last, but not least, turn over the LAC files to next year's LAC.