



NATA CONFERENCE MANUAL

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Conference Manual Outline

I Opening

The annual NATA conference reflects NATA's two key values of providing education to our members and offering chances for networking. For each conference, a conference committee is established.

NATA CONFERENCE COMMITTEE CHARTER (Robin and Nancy)

Mission:

Conference Committee is NATA's vehicle for creating its annual conference.

Vision:

To facilitate the coordination of the programmatic and member related activities of the conference.

To create specific programming, educational and networking opportunities for conference attendees.

To work with the Association Manager on logistics, including facilities, budget, contracts, etc.

Committee Goals and/or Desired Results:

Involve as many NATA members as possible in the implementation of the conference

Create quality programming that meets member needs

Develop and work within an approved budget

Secure an appropriate location and facilities

Provide opportunities for formal and informal networking between and among new and long time members

Integrate members into the association

Provide members with the information needed to develop a greater appreciation of NATA

Provide members with opportunities to return to their congregations with information/skills/materials beneficial to their congregations

Tools to Measure Success:

Evaluation forms

Training sessions offered

Participation of members in sessions

Number of NATA members involved in conference planning and execution

Work within budget

II The Conference Committee -- Selection and Roles (Robin and Nancy)

***Education Officer and Education Chairs – How are they selected?**

******Education Officer: Needs to be filled in from Education Task Force Report**

Provide support for Education Chairs

Work with Conference Officer to communicate with Board

Work with Association Manager for speaker contracts and other logistics

***Local Arrangements Chair – How are they selected?**

Education: speakers at meals, workshops, symposiums

***President in conjunction with Officers select Conference Chair/Co-chairs and Conference Officer, Educational Officer and Educational Co-chairs**

- Visit conference site and recommend hotel to the Board, in conjunction with Conference Officer and Association Manager
- Recommend the Educational Chairs (with approval of President)
- In conjunction with Conference and Educational Officers and Education Chair(s), define the educational theme/content of the conference
- Create budget with Association Manger and work within the budget: keep officers apprised of all budgetary issues, concerns and status on a timely basis
- Conference updates on board conference calls and board meetings
- Work with Association Manager based on roles described below
- Arrange hotel logistics including, food, rooms, AV, and hotel, etc. in conjunction with Conference Manager and Association Manager
- Create a conference time-line
- Create a conference schedule
- Designate Conference Committee members and responsibilities as detailed below
- Coordination with Local Arrangements Chair for off-site activities
- Conference give-aways/materials in conjunction with Local Arrangements Chair and Association Manager

Conference Committees and their Responsibilities:

- Responsible for the specific tasks as described below
- Responsible for working within the budget if one exists
- Recruit additional assistance to involve as many NATA members as possible
- Communicate regularly with Conference Chairs
- Be available to Chairs as needed throughout the conference

Local Arrangements Committee: Off-site details: admissions, transportation, meals, etc.

– arrange details once off-site premise and activity is selected

Local Activity staffing: purchasing of hospitality bag items and stuffing,

Social Activities: Night on Your Own group sign-ups, restaurants, directions (walking, taxi or subway)

Biennial year: transportation coordination to biennial hotels

Transportation: arrival and departure groupings

If closing banquet is off-site responsible for food, decoration, transportation, etc.

Communication/Publicity: Via email, website, snail mail, Facebook, nata-net - hard copies, etc, responsible for regular correspondence to membership including email updates of registration and travel information, hotel reservations, city highlights, packing suggestions

At Conference:

Announcements/Greetings: greeting at meals with necessary announcements, may be rotated by conference volunteers

Worship: Havdalah, Kabbalat Shabbat, Shacharit, Motzi, Birkat Hamazon.

Recruits worship leaders for every morning service and Havdalah creating a fair rotation of volunteers

Include “Willing to lead Motzi, Birkat or Worship” on registration form?

Closing Banquet for non-installation years: hotel or off-site, program, entertainment, including appropriate speeches, awards and certifications

Installation year (every third year). Coordinate with president speakers, awards and certifications

Vendors: solicit vendors, contracts, arrange hotel space

Is this needed here?? Covered in separate section:

Program Book:

1. editorial: work in conjunction with conference chairs to create layout including conference co-chair welcome letter, president’s message, conference schedule, birkat, hotel map, workshop presenters bios and photos, thank yous, prior award recipients, past presidents, member info. (senior, FTA’s)
2. colleague ads: solicit ads with letters, emails or phone calls to rabbis presidents and NATA members with ad reservation form
3. vendor ads: solicit vendors who are attending, vendors unable to attend and vendors who never attend but are willing to support NATA for program ads and sponsorships; donations from local groups

Additional Sub-Chairs with or without committee members

- Evaluations: prepares form for online evaluation immediately following conference, evaluate and tabulate results for executive committee, current conference chairs and upcoming conference chairs

- Information Bazaar: thumb drive prepared in advance of conference (sponsorship opportunity), and one hard copy on display at conference for visual learners including all samples on NATA website
- First Timers:
 1. Pre-conference: buddy sign-ups on registration form, if not enough volunteers, calls need to be made for additional volunteers, buddies should contact their first timer in advance, buddies sit with their first timer for a few meals and check-in regularly, buddies need to stay in contact for the entire year or more.
 2. Reception: timing on schedule and refreshments determined by conference chairs and Association Manager. Reception invitation created by Membership Chair. Short welcome speech by president.
 3. Formal Introductions schedule determined by conference chairs. Introductions needs to be embellished, but not inappropriate. Executive Committee to put more thought into this.
 4. On-site Registration: Volunteers organized by Membership Committee

Board Responsibilities:

Approval of budget
 Approval of city
 Approval of hotel

Association Manager:

Manage and maintain the budget in conjunction with conference chairs
 Responsible for pre-registration and registration
 Negotiate all contracts including hotel, off-site venues and speakers
 Coordinate and attend site visits
 Maintain data base
 Serve as key conference contact among Chairs, hotel and vendors/venues
 Work closely with all Officers and Chairs of the conference

Conference Officer:

Work with President and Conference Chairs to create time-line for Officers, Board and Plenary meetings
 Conference updates on officer calls and meetings

Liaison between Conference and Education Chairs and Officers/Board
 Provide support and oversight for Conference Chairs
 Determine if and when something needs to be brought to the Board and/or Officers and follow through
 Establishes regular pattern of communicating among the conference chairs, education officer and education chairs
 Support the work of the Convention Chairs and Association Manager

Additional responsibilities of the Committee Chairs

Write intro for Program book; proof all of program book

Oversee all committee chairs, participate in various committee conference calls

With input from Education, determine set up and AV for each speaker session.

(Balance ideal set up for each session (as close to speaker as possible, for ex) with need to minimize set up changes in room. Review set up needs with Kathy before submitting to hotel.)

Program opening and closing banquets

Prepare and make opening remarks

Prepare and make closing remarks

Announcements at each meal

Thank you gifts to key chairs

Thank you's following conference

III Hotel (Kathy)

A Selecting the hotel

The board selects the cities NATA is considering for a conference. Kathy prepares an RFP (Request for Proposal) and selects hotels that meet the size and standard required by the group. Suggestions of hotels may be provided by the board or local hosts. Examples are 300-800 room hotels with 2 large banquet rooms (can accommodate 150-180 banquet and general session, and 5-6 breakout rooms that can hold 30-40 people. We also look for hotels that are within 20-25 minutes of a major airport.

B Room counts/minimums

We traditionally contract for 100-150 rooms per night or a total of 400-600 room nights. We request 10 upgraded rooms and one presidential-style suite for the NATA president. All rooms are at the same group rate. Build in a 20-30% attrition clause to protect NATA.

C Food/people counts per meal

Meal planning is always a challenge. If we have 125 people in attendance, we normally plan for 110 at breakfast, 120 for lunch and dinner. Normally the hotel will prepare enough for approximately 5% over, so the amount of food will be covered.

We create menus that reflect Kosher-style meals. No mixing of meat and cheese, no pork products or shellfish. Careful considerations needs to be made to accommodate vegetarian needs as these attendees are usually keeping Kosher.

D Getting the hotel the info they need

Each hotel provides a conference service manager. They are in charge of gathering the information for our event. This includes setting up the room schedule, AV needs, Room set-up, meals, etc. It is important to communicate clearly with this manager and to cross-check the schedule closely. This person will also be your point person during your event, as well as other important hotel staff (Banquet manager, Banquet Captain, AV manager, etc.)

E “Tricks” in working with the hotel (what can we bring in ourselves to avoid hotel charges)

The important piece of working with a hotel is setting up a good, clean contract. Do not over-book sleeping rooms or have too high of a food and beverage guarantee. Build in a 20-30% attrition clause to protect NATA, and this clause should be reflective on sleeping rooms and food and beverage. Communications is key. Keep in mind that the hotel wants your event to be successful, and they will work with you as best they can. A good/solid relationship is very important, and to treat the hotel staff with respect and proper recognition. Being honest and asking for their help in sorting through possible issues is essential.

F What we need at the hotel to have a functional office during the conference

As part of the contract, set aside a small meeting space that can be used as an office/storage room. Ideally it should have Internet access, and, if possible, a printer for the board or speaker to use, if needed.

IV Membership Communication (ELLEN)

- A How will our members learn about the conference? Keeping the membership aware of upcoming conferences is key, and with the conferences booked as far in advance they are, this shouldn't be too difficult. But it requires clever, repeated, and varied reach outs to the membership. Recent efforts to do so in the most cost effective ways possible has lead to email and web communication only, and this appears to be adequate. Repetition is key, particularly in light of digital communication only, and clever, “cutting through the noise” messages are particularly important.
- B The web site. The updated NATA website is ideal for promoting and communicating the conferences.

V The Program Book (Kathy)

A Printer selection

We have been working with one graphic artist and printer for the past four + years. Her name is Lori Obermeyer. Her contact information is as follows:

Lori Obermeyer
Obermeyer & Associates in Design, Inc.

6466 Wiehe Road
 Cincinnati, OH 45237 lebel@cinci.rr.com
 513-531-5141
 513-351-6028 Fax

Lori came to us via Betti Greenstein and is a delight to work with.

B Art work selection

The layout of the book is fairly standard. The art work/conference logo is usually designed by Lori with direction and input from the conference chairs and the association manager. It is reflective of the conference theme and location of the conference.

C Content decisions and submissions

The content of the program book is fairly standard. The conference and education chairs are involved with gathering the details of the schedule, course descriptions, instructor bios and photos. The association manager is responsible for the overall production and collecting/managing the member and vendor ads, and specific pages within the book. See the program book outline for details.

<u>Page No.</u>	<u>Page Name</u>	<u>Responsible for material/Type of content</u>
Covers	Cover/Back Page	Association Manager is responsible for logo and design of these 2 pages. Back page is ad for the following year's conference Ad.
Inside Covers	Inside front/back covers	Saved for 2 vendor who are major sponsors
1	Table of Content	Graphic Artist manages
2	Message from the President	NATA Pres.
3	Message from Conf Chairs	Conf Co-Chairs
4	Education	Education Committee: Goals & Committee recognition
5	NATA Board	Assoc. Mgr: Board Page w/ photos?
6-7	Daily Schedule	Education Chairs: Schedule by Graphic Artist Two-page spread
8-10	Workshop/Classes	Education Chairs: Descriptions of courses/workshops
11-15		Education Chairs: Presenter Bios & Photos
16-65	Ads: Member and Vendor	Assoc. Manager collects; Number of pages may vary
66-67	Sponsor & Vendor Pgs	Vendor Chair & Assoc. Manager
68-69	NATA Awards	Assoc. Mgr.
70	Board Page or other?	Assoc. Mgr
71	FTA & Sr. List	Assoc. Mgr

72-73	Birkat	Worship Comm. Chair – 2 page spread
74-75	Thank you pages	Conf. Co-Chairs
76	Hotel Floor Plan	Assoc. Mgr.

D Timelines and deadlines

The timeline is set up based on the conference dates, and working backwards. Work with Lori as the timeline is set-up. The book should be shipped to arrive at the hotel on the Wednesday prior to the conference. Notify the hotel's conference manager of this shipment so they can watch out for the delivery.

Using November 12-16, 2011 as the conference dates, the basic time line is as follows:

May 30-June 1	Ad Letter/form to Rabbi/Presidents and Regular/Senior Members of NATA
June 20-July 15	Follow up calls, emails or letters to solicit ads from Rabbis/Presidents targeting past ad participants and current conference volunteers (done by volunteer)
July 1-August 8	Collect Ads, course descriptions, photos, etc.
August 12-15	All materials submitted to Graphic Artist
September 8-13	First Proof
September 14-15	All corrections to Graphic Artist (build in extra time due to HH/YK dates)
October 11-12	Final Proofing
October 13	Final Proof completed/Corrections to Graphic Artist
October 20	To printer
Nov 1	Ship completed program book via Fed Ex Ground to arrive by Nov. 9

E Tribute Ads

Ad letter is sent out on June 1 with timeline for ad submissions. Letter or email goes to each congregation's Rabbi and President. Each ED should receive a copy of the ad form, too.

VI Vendors MICHAEL AND KATHY

- A Setting prices
- B Mailing lists
- C Cover letter and form
- D Vendor area layout

Association Manager works with hotel to create a vendor floor plan and forwards the plan to the Vendor Chair.

E Finding additional opportunities for vendor sponsorships

F Ads

Association Manager collects vendor ads and payments for program book.

Reports progress to Vendor Chair.

G Communication

Step	Responsible	Timing
Pre Conference		
Review & update Vendor Packet (Introductory Letter, Attention Vendors Sheet, Exhibitor Agreement, Sponsorship Opportunities, 1st Timers Reception Sponsorship Letter, Vendor Sponsor & Ad Form, Vendor Comp Breakfast Form) <ul style="list-style-type: none"> - Dates - event dates, deadline dates - Location - Vendor Fees (determined in consultation with conference chairs, vendor chair, NATA Administrator, NATA President) - Sponsorship Offerings and Pricing - Conference logo 	Vendor Chair	6 months out
Review & update vendor contact list	Vendor Chair	6 months out
Email Vendor Packet to perspective vendors	Vendor Chair	5 months out
Respond to questions and requests from vendors	Vendor Chair, NATA Administrator	ongoing
Inform NATA Administrator of sponsorship and/or program book advertising requests	Vendor Chair	ongoing
Process vendor registrations	NATA Administrator	ongoing
Follow up with vendors who send in exhibitor agreements without payment	NATA Administrator	ongoing
Email conference reminder along with vendor packet to vendor list	Vendor Chair	4 months out
Email reminder to make hotel reservations to vendors who have registered	Vendor Chair	3 months out
Obtain exhibitor space floor plan from hotel	NATA Administrator	3 months out
Assign booths to vendors	Vendor Chair	2 months out
Finalize program book ads	NATA Administrator	2 months out
Finalize sponsorships	NATA Administrator	2 months out
Create vendor signage	NATA Administrator	2 months out
Finalize exhibitor booth assignments	Vendor Chair	1 month out
Create vendor signs to place at each booth	Vendor Chair	1 month out

<u>At Conference</u>		
Set up vendor registration table	Vendor Chair	morning of check-in
Place vendor signs at each booth	Vendor Chair	morning of check-in
Check in vendors	Vendor Chair	morning of check-in
Walk around from time to time to see how conference is going	Vendor Chair	throughout conference
Hold meeting with all vendors to solicit feedback	Vendor Chair, Conference Chair	before vendors go home
<u>Post Conference</u>		
Send thank you email to all vendors who exhibited	Vendor Chair	1 week after end of conference

VII Conference Schedule ELLEN

- A Since the conference is expected to meet many goals, it's important to consider all of them, when putting together the conference schedule. If "Education" were the only goal, then we could offer classes and sessions all day long. But since "Networking" is also a primary goal, the time spent learning needs to be balanced by the time we offer our colleagues the chance to schmooze, network, learn from and connect with one another. Every conference is different, so there are no simple solutions to this question, but it needs to be considered carefully.

Some will argue that they're not getting time away from their office to simply hang around with colleagues; they will want many and intense learning opportunities. Others will say that being with colleagues is learning, and will want mostly "hallway" time.

Since every conference is different, there is no one formula that will work for all, but it's important to consider what the proper balance is.

- B Every conference includes most, if not all, of a number of elements. It's helpful to first map out where these elements go, in large chunks, so you have a working sense of how the days will flow, and then fill in details.

Depending upon which time zone the conference is taking place in, and how many attendees are likely to be facing "jet lag," you'll want to consider when to "pack" the learning in, and when to open up the conference for a less intense

program.

Our experience has been that afternoons tend to be tricky times to program well, with fatigue and post lunch grogginess the challenges to overcome. Consider more active activities, where participants are engaged, rather than frontal presentations where participants are only expected to sit and listen.

Shoot for a combination of large group sessions along with small group opportunities, use of different rooms (if possible) and setting up the rooms in a variety of ways – all to keep the conference sessions feeling dynamic and energetic.

- 1 Education and workshops. As Education is typically the “heart/soul” of the conference, this element is discussed more fully in a separate section.
- 2 Worship. As professionals managing synagogues, it seems obvious that worship be a part of our annual get togethers. This “assumption” may be worthy of discussion, as we at NATA have found decreasing attendance at services, at least at daily/morning services.
- 3 Meals, including
 - i Shabbat dinner (assuming pre conference includes Friday night)
Depending on when the conference begins, Shabbat dinner may or may not be part of the conference. For the past few years, Shabbat dinner was an extra meal, for which we charged, for anyone who chose to arrive by Friday night. It is typically a wonderful evening, in a more intimate setting, so colleagues can begin to reconnect and network.
 - ii Opening Banquet. This big evening kicks off the conference. In the past, NATA conferences have begun on Saturday evening, so the first “official” gathering of the members is for Havdalah, then the Opening Banquet.

The Opening Banquet typically includes schmooze time, a buffet or plated dinner, and program. It may be the responsibility of the conference leaders to program, or the leadership of NATA, so it’s important to coordinate and communicate. Most recently, this has fallen to the Conference Chairs.

The opening banquet kicks off the conference and set its tone, give the participants a kick start into the material they are about to encounter. Typically, the conference chairs have a big presence in the program of the opening banquet. In past years, this time has also been used to introduce first timers, announce retirements, etc – i.e., share membership news.

- iii Closing Banquet. We celebrate a great conference at the closing banquet. Whether it is at the hotel at which the conference has been

taking place, at a local synagogue, or some other off site locale, it's a celebration, a thank you, and often a leadership transition. NATA awards can be announced, NATA membership pins are given out and FTA's are awarded. During leadership transition years (currently, every 3 years, given NATA's board/leadership terms), the outgoing president says so long and the incoming president is installed, often by the clergy from their congregation.

iv Is there a night on your own ?

Often motivated by the budget, NATA has offered a "free night/dinner on your own" evening. And while it gives members the chance to explore the city in which the conference takes place, it also may create some anxiety for those who don't know colleagues, can't find a group to dine with, etc. Past efforts to mitigate this have included sign up sheets, often by cuisine, but if Portland 2010 is any indication, this didn't help too many, as the sign up sheets were mostly left blank. Perhaps the NATA leadership can take a more active role here in the future – by being "captains" of groups or otherwise helping to organize and make sure no one is left out.

Another alternative to consider is to include the cost of the dinner in the conference fee and simply remove the need for each participant to make plans.

4 Annual meeting of NATA membership.

There is probably the need for a "plenary," the annual business meeting of the organization. The NATA leadership coordinates this, calling for an opening D'var Torah, President's comments, and reports from the various committees and task forces, and any discussion and/or votes that the membership needs to decide on.

C Is Pre-Conference session necessary/desired? Lately, based on the contract with the hotel and the need to fill our room block, we have offered Pre-Conference learning opportunities for the membership, hoping that folks would arrive early and stay at the hotel for an additional night or two. Our experience is that the Pre-Conference sessions have been very successful on a number of levels – more networking opportunities, self selected learners so the education could be on a deeper level, AND increased the number of room nights we booked at the hotel.

D Elements to program at some point during the conference:

- 1 FTA classes, exams, and award of degree
- 2 Service to NATA award
- 3 First timer introductions
- 4 Membership pins

- 5 Leadership transitions
- 6 Presidents' remarks
- 7 Any member news – retirements, etc.
- 8 "Guests," including URJ, RPB, NAASE, NACBA, rep from local tzedekah project.

VIII Education (MISSY)

A THEMES

1 OVERALL CONSIDERATIONS

- i Professional growth
- ii Teaching fundamentals and the essential core competencies for EDs
- iii Deepening/Enhancing knowledge and skills
- iv Needs of Membership: The starting place for identifying themes must be the membership as a whole. Convention education must be relevant and responsive to the needs of our members.
- v Surveys: At regular intervals the membership should be surveyed to ascertain what subject matter it feels are priorities for the conventions to be addressing.
- vi Build upon past conferences or stand alone?
- vii Multi-year strategic plan
- viii New comers vs. experienced veterans
- ix "Issues" vs "How-Tos": nuts & bolts material vs. conceptually-oriented material.

2 DEFINE THE AREA OF COVERAGE

- i Depth of Coverage: A single subject in-depth and provide a substantive exploration and understanding of that subject
- ii Breadth of Topics: Cover a broad range of disparate subjects and provide people with a lot of random information and material

3 THINK TANK RECOMMENDATION

- i an in-depth approach affords the maximum meaningfulness for both newcomers and veterans.
- ii Allows for concentrated learning and for a more extensive exploration of a given subject
- iii It speaks to both newcomers and veterans
- iv It provides for the opportunity for veterans to mentor newcomers as all members interact when they engage with the subject
- v It can be provocative, stimulating further professional-level discussion—witness the residual effects of the (in)famous "three-legged stool" theme that emerged at the convention several years ago

- vi It offers more that can be taken back to the congregation and applied to our work at home

B GETTING STARTED

- 1 Choose a Theme/Topics
- 2 Educating ourselves in the subject(s)
- 3 Preparing an education program vision statement
- 4 What do we want to teach?
- 5 What is the “take away” from conference?
- 6 What’s the unifying question we are trying to answer?
- 7 Structure the subject Determine how the subject can be divided into components that best present and illustrate the teaching objectives.
- 8 Determine the optimal formats for presenting each component.
 - i Establish the central question for each component
 - ii Identify the presentation format that would best address the question

C SELECTION OF MAJOR TEACHERS

- 1 Budget Considerations
 - i URJ as resource
 - ii Teaching from within
 - iii Networking in local area
- 2 Using an Outside Speaker
 - i Outside speakers need to be judiciously selected. A process should be established for selecting, vetting and orienting outside speakers.
 - ii The area of her/his expertise links directly to the subject matter the workshop is designed to focus on
 - iii Explain us to them
 - iv prepare the expert by walking them through the core questions to be addressed in the presentation and defining the correspondences between their view of the material and the needs of the ED
 - v Allow for a component of the presentation which will enable EDs to “translate” the presentation content to our circumstances, either through discussion or some interactive technique
 - vi Must BE RECENTLY VETTED
 - vii Important for speakers to communicate BEFORE the convention

D MODELS AND FORMATS

- 1 Tracks of workshops on a single theme
 - i there could be a track of 3-4 workshops that develop a particular subject from a basic to an advanced level—possible subjects, for example, budget preparation, construction management or personal management
 - ii such a track would run concurrently with other workshops
- 2 a “scholar-in-residence”/“master teacher” program of workshops on a single theme

- 3 "Educational model" of 2002/2003/2004
 - i Series of 2-3 major, plenary presentations/workshops/panels
 - ◆ Single overall theme
 - ◆ Each followed by breakout sessions
- 4 101-type workshops
- 5 Interactive Learning/Breakout Sessions
 - i Small Group discussions. Reflect on, "process," "unpack," or amplify the ideas that were introduced in the presentation.
 - ii breakout groups by congregational size or years of experience
 - iii Translate concept into practice.
 - iv Techniques for interactive learning might include:
 - ◆ case studies
 - ◆ role playing
 - ◆ threaded questions
 - ◆ bulletin boards
 - ◆ debates.

E PRE-CONVENTION PREPARATION

- 1 Giving people "homework" before the convention provides a glimpse of the convention content, while at the same time orienting participants to the ideas and language of the material which is to be covered. The latter is particularly helpful if the workshops will introduce new material.

F POST-CONVENTION PREPARATION

- 1 Depending on the nature of the theme, distributing post-convention assignments could serve to assist participants in applying the lessons learned to their own workplace needs.

G PRE & POST CONVENTION SEMINARS

IX Budget (Kathy)

A Revenue available from previous year's conference
Traditionally the vendor and Advertisements fees collected are forwarded to the next year's conference budget. The average amount forwarded is around \$20-\$25K

B Setting the conference fee
The conference fee is based on direct costs such as the program book, food, AV, rental and transportations costs.

C Availability of scholarship money?

This is determined by the Board and Scholarship Committee.

D Cost savings ideas

Explore ways to save costs by checking to see if the hotel allowing us to bring in own projectors, flip charts, etc. Determine if the Presidential suite can accommodate a reception of 50 ppl, and consider holding the first-timer and board receptions in that suite. If this is available, consider bringing in wine/drinks and snacks to save on food costs with the hotel. This normally is frowned upon by the hotel staff, but if some food/beverage items are ordered from the hotel, and NATA augments the service, it can be a win-win. Keeping these arrangements on the quite side is preferred.

X. Registration

A Pre-Registration

Members register online using a specially designed form via I4A, created by Perfect Day Media. Registration normally opens by June 15th, and runs until 2 weeks prior to the conference. Only member of NATA are eligible to register, and have the option of paying a full fee (actual cost) or a subsidized fee (sponsored by NATA) with a reduced rate of \$50-\$100, depending on available funds (to be determined by the NATA Executive Committee).

B On-site registration

Name tags are created by the Association Manager, and name badge holders are usually a sponsored item from a vendor. The Registration Committee staffs the Registration table to check people in as they arrive, welcome them to the conference, and hand out materials. Except for very unusual circumstances, there is no "on site" registration/payment; all participants are expected to register and pay in advance.

C Goodies: Bags and conference giveaways are built into the budget as part of the registration fees. Traditionally a bag, notebook, pen, and other items are passed out each year. The program book is included in each bag. On occasion, the local host will gather some local fare (unique to the location) to include in the bags.

X. Signage

The association manager creates sponsor, vendor and major event signs for the conference. They are usually created at a local Fed-Ex/Kinko's in poster size (24"x36") and mounted on foam board. The hotel will supply poster easels to display the signs. Typical signs are: Vendor Thank You, Sponsor acknowledgement, Welcome/Registration signs, Special speaker signage outside an event.

X Conference evaluation (Ellen) Meaningful feedback is key, and typically we have offered post conference evaluations, asking for responses to about overall aspects of the conference as well as specific sessions and teachers. Ideally, questions should be repeated from year to year, so that comparisons are possible. But it's equally important to keep the info in perspective. Evaluations are good guides for the future and hearing about what the members want, not report cards of the current conference committee.

XI Information Sharing/Information Fair. (Ellen). Sharing info and best practices is a key value for the NATA membership. In 2010, we moved toward a digital method of delivery, which seems to be of great value – it cut down on the cost of sending samples to the hotel, organizing and staffing the “resource room” at the hotel, and weighing down members’ suitcases on the way home. The 2010 NATA Thumb Drive was organized by type of document to allow for easy searching. One goal will be to collect even more samples, so this tool is even more valuable.

XII TIMELINE

TIMELINE (from association manager perspective)

24-36 months in advance

Select Cities (normally two or three) and prepare an RFP with exact information on dates, number of sleeping rooms and schedule. Review proposals, select one city and schedule site tours with NATA president. Select hotel, enter into a contract with desired hotel.

18 – 24 months in advance

Review hotel contract and submit deposits as needed. Review banquet menus and start to work on budget with conference chairs. Begin conference calls with chairs to plan a theme; assign committee members; determine Education co-chairs.

12 – 18 months in advance

Schedule a second site tour to discuss program, room set-ups, and local tours, if any. Continue with conference calls and committee assignments.

12 months in advance

Set up theme; complete budget

9 months in advance

Establish program book time line; work with vendor and marketing committees to prepare vendor and solicitation letters for ads. Work on menus keeping within budget.

6 months in advance

5 months in advance

4 months in advance

Confirm room assignments/Schedule and AV Equipment required; Order bags and give-aways; Ribbons as needed. Marketing person to collect Local Chapter donation? Program Book!

Consider Lunch by Cong. Size; First-timer lunch w/ speaker on NATA.

Three months in advance

Secure contracts or Letters of Understanding for speakers outlining flight, hotel rooms, receipts and reimbursements. Confirm guests (NAASE, Speakers, etc) who are attending and reserve hotel rooms; Final Program Book Prep/Proofing.

Two months in advance

Prepare reports: Membership, Assoc. Manager, Tribute, and Placement; AV Equipment scheduled. Local Host & Assoc. Mgr: Schedule off-site transportation as needed; 4-5 weeks out - Program book completed and to printer.

One month in advance

Prepare FTA and Senior Certificates; create name tags for delegates and vendors; Meal counts and Veggie meals to hotel; Final Schedule to Hotel; Prepare NATA Member pins/certificates; Final AV; Assist with NATA Awards as needed.

2 weeks in advance

Start drinking heavily; schedule spa treatments; Ship all materials to hotel via ground to arrive by the Wednesday before the conference. Plan on 7 working days time line to ship.

Leading right up to the start

Here we go.....

Confirm all transportation;