

**CONVENTION CHAIR HANDBOOK**

**&**

**CONVENTION CHAIR TIMELINE**

**August 2023**

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    1.2.6. If there has been an FDCC Convention at this location previously, collect all the information you can about that previous meeting..... 1

        1.2.6.1. Find the old Brochures and promotional materials. See website at [https://www.thefederation.org/Online/Events/Past\\_Events/Online/Events/Past\\_Events.aspx?hkey=c1e7ae95-14c6-4394-aa4d-bef354a7f9d](https://www.thefederation.org/Online/Events/Past_Events/Online/Events/Past_Events.aspx?hkey=c1e7ae95-14c6-4394-aa4d-bef354a7f9d) ..... 1

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1.4. Make a list of the things you really liked or disliked about prior Conventions or meetings you have attended, what you considered to be big hits, really popular, duds, etc. .... 1

1.5. Interview your President about the same. .... 1

    1.5.1. Find out early what expectations your President has with respect to managing the budget, i.e., make money versus giving full value to attendees..... 2

    1.5.2. With the input of the Chief Financial Officer, the Meeting Planner, the Program Chair, and the President create a preliminary Budget. .... 2

2. Before Your First Site Visit (Timing is Variable) ..... 2

The first site visit is the time when you get to know your site firsthand. Begin to map out the general location of your major events, meet with your President and discuss the convention face-to-face. Think about using this visit to sketch out your meeting in broad strokes. Start identifying restaurants for events such as Officer’s Dinner and Special Friends. Collect menus and take notes on all restaurants you visit, focusing on cuisine, distance from hotel and any novel aspects of menu and ambience..... 2

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<a href="https://www.thefederation.org/Online/Membership/Directory/2023_Roster/Online/Membership/Roster.aspx?hkey=0e1eddc9-2d1b-45b3-80c8-f264028839c1">https://www.thefederation.org/Online/Membership/Directory/2023_Roster/Online/Membership/Roster.aspx?hkey=0e1eddc9-2d1b-45b3-80c8-f264028839c1</a> .....	3
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4.8.	Keep your Program Chair updated in the broad strokes of your planning. This is a team effort...	5
5.	Three Conventions Before Yours (Roughly 18 months out)	5
5.1.	Set up and tend your display table (if President agrees)	5
5.2.	Meet substantively with your President and Program Chair	5
5.2.1.	Review your present schedule and questions per above	5
5.2.2.	Review proposed activities, design ideas, entertainment ideas, etc.	5
5.2.3.	By the time you leave, you should have agreement on broad ideas and schedule so you can begin to execute	5
5.3.	Check with the Program Chair – is the Keynote nailed down? (Depending upon the cost of the Keynote Speaker and your budget, do you need any financial assistance from the Foundation? If so, your Program Chair will need to write a proposal and present it to the Foundation). You will need to start writing down promotional introduction, and you will want to sell the program along with the meeting	5
5.4.	Post-visit follow-up	5
5.4.1.	Update your Master Schedule based upon input from your meetings	5
6.	Unofficial Site Visit (Time variable, preferably one year out)	5
	Who goes on and who pays for an unofficial site visit is a matter of discussion and personal choice. If you choose to take one, your site visit will probably focus on filling out the activities and events beyond the Big Three. Plan visits to daytime activity vendors, meeting and working with local vendors to flesh out ideas, as well as getting deeper into planning the Big Three. Visit more restaurants and continue to take notes on each which will be needed for your brochure and answer questions and requests for recommendations.	5
6.1.	Pre-Visit Planning	5
6.1.1.	Identify activity vendors and schedule meetings	5
6.2.	The visit itself	5
6.2.1.	Choose your time - preferably 1 year out, at the same time of year as your Convention	5
6.2.2.	Meet with activity vendors; collect brochures, pricing and contact information for the vendor point person	5
6.2.3.	Re-visit your schedule and locations for more ideas, details	5
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6.2.5.	Start thinking about Convention gifts earlier rather than later	6
6.3.	Post-visit follow-up	6
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6.3.2.	Begin working on vendor contracts for activities .....	6
6.3.3.	Update your Master Schedule and share changes with the President, your Program Chair, and the Meeting Planner. Keep the Chief Financial Officer in the loop as to all matters affecting the Convention Budget .....	6
7.	Before You Arrive at The Convention Two Before Yours (14 months out) .....	6
	By the time you get to this point in your planning, your Convention is one year out. You should have the basic outline of your Convention and many of its details planned. Your schedule of events should be fairly locked down. You should know what events are happening on which days, what special events you are planning, whether you are doing anything different from the usual schedule of events, etc. Scheduling optional activities often lags, but you should have a pretty good sense of the number and type of activities you want to offer. Hint: don't plan so many activities that attendees have little chance for free time. Attendees will want to have time to plan their own activities. ....	
7.1.	One Year out, prepare a short Federation Flyer Article. 500 words. See website at <a href="https://www.thefederation.org/Online/Digital_Newsroom/FDCC_Flyer/Online/Digital_Newsroom/FDCC_Flyer.aspx?hkey=75603456-24d1-44a0-8224-ebe837ab6071">https://www.thefederation.org/Online/Digital_Newsroom/FDCC_Flyer/Online/Digital_Newsroom/FDCC_Flyer.aspx?hkey=75603456-24d1-44a0-8224-ebe837ab6071</a> .....	6
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7.3.	Prepare Board/P&O Presentations promoting your meeting .....	6
7.4.	Prepare your proposed budget for F&B review. ....	6
7.5.	Work with the Program Chair on a letter to the Foundation President regarding request for financial assistance for Convention Speakers to the extent that such assistance is reasonably needed....	6
7.6.	As before, come to the meeting with a list of issues and decisions that you want to discuss with your President and Program Chair [Charm?]. ....	6
7.7.	Invitations – discuss stationery with President and its Spouse and the Executive Director .....	6
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8.2.	Conduct presentation to the P&O Committee.....	7
8.3.	Be prepared for a possible presentation to F&B .....	7
8.4.	Bring the materials for your Convention Display table and set it up (candy dish will lure in visitors) .....	7
8.5.	Meet with your Convention Team to review your list of outstanding items, questions, decisions as set forth below.....	7
8.6.	Decide on any entertainment, especially the band for the dinner/dance.....	7
8.7.	Prepare for possible Foundation Board appearance with the Program Chair .....	7
8.8.	Post-visit follow-up.....	7
8.8.1.	Update your Master Schedule based upon your meetings and discussions. ....	7
8.8.2.	Begin drafting your Brochure with the Program Chair.....	7

8.8.2.1.	Review past Brochures for ideas and approaches. See website at <a href="https://www.thefederation.org/Online/Events/Past_Events/Online/Events/Past_Events.aspx?hkey=c1e7ae95-14c6-4394-aa4d-be1f354a7f9d">https://www.thefederation.org/Online/Events/Past_Events/Online/Events/Past_Events.aspx?hkey=c1e7ae95-14c6-4394-aa4d-be1f354a7f9d</a> .....	7
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	You will need to have completed your small, informational Brochure before this meeting. Your Convention (with the exception of event details like menu, decoration, flowers, etc.) should be essentially planned because as soon as you leave this meeting, you will need to start writing your main Brochure. (Think about all the details contained in these Brochures and you will have an idea of what will have to be nailed down very soon after you leave this Convention.) While at this meeting, you will be giving more fulsome reports to the Board and P&O, as well as to the entire Convention on the last day of the Plenary. ....	8
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9.2.	With your Program Chair, prepare your presentation to the entire Convention .....	8
9.3.	Get the small Brochure to the printer five weeks before this Convention .....	8
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10.8.1.	Consider use of promo hats, t-shirts, etc. Discuss this with your President.....	8
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10.9.1.3.	List what needs to be finalized to complete your Brochure.....	9
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13.2.	Wine, alcohol finalized .....	10
13.3.	Decorations finalized.....	10

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**H. Resources available to you as Program and Convention Chairs**

[https://www.thefederation.org/Online/Resources/Resources\\_for\\_Convention\\_\\_Program\\_Chairs.aspx](https://www.thefederation.org/Online/Resources/Resources_for_Convention__Program_Chairs.aspx)

## A. Timeline

### 1. Upon Appointment

- 1.1. Get and review your hotel contract. Calendar all critical dates, especially room block deadlines. Calendar your dates to take cuts on the room block.
- 1.2. Collect and review resources about your Convention location, including:
  - 1.2.1. The hotel website
  - 1.2.2. Travel books and travel guides
  - 1.2.3. The local Chamber of Commerce
  - 1.2.4. History of the local area
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- 1.5. Interview your President about the same.

- 1.5.1. Find out early what expectations your President has with respect to managing the budget, i.e., make money versus giving full value to attendees.
- 1.5.2. With the input of the Chief Financial Officer, the Meeting Planner, the Program Chair, and the President create a preliminary Budget.

## 2. Before Your First Site Visit (Timing is Variable)

The first site visit is the time when you get to know your site firsthand. Begin to map out the general location of your major events, meet with your President and discuss the convention face-to-face. Think about using this visit to sketch out your meeting in broad strokes. Start identifying restaurants for events such as Officer's Dinner and Special Friends. Collect menus and take notes on all restaurants you visit, focusing on cuisine, distance from hotel and any novel aspects of menu and ambience.

- 2.1. Prepare and agree on schedule for visit
- 2.2. Research sites and activities you may want to visit
- 2.3. Learn about the hotel, its history, available spaces, view their photo gallery, on-site amenities and activities, etc.
- 2.4. Before you get there, have a skeletal schedule of the main events in mind, generally tracking the "usual" schedule of events. (The easiest way to do this is to use the last couple of Annual or Winter meetings as a guide.)
- 2.5. Think about how you might want to change that basic schedule or need to change it for a longer or shorter meeting.
- 2.6. Think of themes and visuals you may want to use to promote your convention. Uniqueness of venue should be considered for all promotional activities. You will need a great deal of material for Friday Five postings, the Brochure, monthly newsletters, and a *Flyer* article prior to and following the Conference.

## 3. First Site Visit (Timing is variable, usually 18 to 24 mos. before Convention)

- 3.1. Visit and make preliminary decisions on locations and dates for the major events
  - 3.1.1. Theme Party, Presidents Reception, Dinner Dance (the "Big Three"), Dessert Party
  - 3.1.2. Visit potential off-site locations for major events
  - 3.1.3. Florist and decorator (lighting, staging, table linens, etc.)
- 3.2. Make preliminary decisions on sites for special events (as requested by President) -- Officers' Dinner, Past Presidents' Dinner, Special Friends Dinner, etc.

- 3.3. Nail down golf tournament date and location. Meet with the Golf Pro
- 3.4. Nail down cocktail party locations
- 3.5. Nail down war room location. Close proximity to registration should be a priority if possible.
- 3.6. Nail down registration location. Priority should be given to location, but the ability to lock the room at night without breaking down the room should also be a priority. Consider the proximity of the registration location to the sponsor location.
- 3.7. Nail Down New Member Reception location.
- 3.8. Brainstorm themes with others on the trip. Check the list of themes from past Conventions. Themes can be developed based on novelty of the venue or cultural trends.
- 3.9. Think of and collect visuals and graphics you may want to use in all your promotional materials. Err on the side of having too much.
  - 3.9.1. Take pictures of everything: inside/outside hotel, hotel rooms and meeting space. Pictures can help planning back home, provide variety for your brochure, and should be used for promotion on the website, the app, the Friday Fives, the two Flyer articles, and perhaps a video if you choose to create one
- 3.10. Brainstorm about possible charms. Identify a symbol of the venue if possible. Check the charm list at page 322 of the Roster. See website at [https://www.thefederation.org/Online/Membership/Directory/2023\\_Roster/Online/Membership/Roster.aspx?hkey=0e1eddc9-2d1b-45b3-80c8-f264028839c1](https://www.thefederation.org/Online/Membership/Directory/2023_Roster/Online/Membership/Roster.aspx?hkey=0e1eddc9-2d1b-45b3-80c8-f264028839c1)
- 3.11. Collect even more information on local activities, dining, side trips, etc.
- 3.12. Consider local gifts for convention gift ideas
- 3.13. Identify problems/concerns with venue, such as proximity to airports, exchange rates, customs issues, traffic, taxi and ride share availability, etc. Such issues will help estimates of attendance and with advice for your Convention related communications.
- 3.14. Post-visit follow-up
  - 3.14.1. Populate skeleton schedule of main events, main activities, locations
- 3.15. Invest in informational books (*Fodor*, *Frommer's*) and hotel history

#### 4. Before You Arrive at The Convention Three Conventions Before Yours (Roughly 18 months out)

Three Conventions out from your own meeting, you will need to be prepared to start (lightly) promoting your event and provide the leadership with a glimpse of your plans, even if only preliminary. Talk to your President about what he or she expects to be promoted and discussed at this meeting

- 4.1. Your theme should be decided before you get to this Convention
- 4.2. Design and obtain promotional stickers
- 4.3. Design and obtain the necessary materials for your Convention Display Table such as books, photos, video, stuffed animals, flags, candy, PowerPoint, poster board
- 4.4. You should have a preliminary budget by now that you developed with the Chief Financial Officer, the Meeting Planner, and the President (to the extent that he/she wants to be involved)
  - 4.4.1. Discuss attendance estimates
  - 4.4.2. Discuss/confirm registration fees
  - 4.4.3. Discuss pricing options for children and activities for children
- 4.5. Check with the various committees about whether you are expected to report to them (the Board, P&O, Foundation, F&B). Probably not, but don't get surprised. Have a PowerPoint ready, albeit brief, just in case.
- 4.6. Prepare to outline where you are in your planning for your President, including questions and needed decisions
  - 4.6.1. Proposed schedule of main events. Do you want to change anything from the norm? Decide this early.
  - 4.6.2. Outline questions, ideas for major events, especially the Big Three
  - 4.6.3. Black Tie or No Black Tie – decide early
  - 4.6.4. Recommendations for types of entertainment for major events
  - 4.6.5. Prepare a list of possible daytime activities you might want to offer. Remember to think about activities for children.
- 4.7. Prepare recommendation as to whether you will be holding any special or different events, such as Fellowship Dinners, International Dinners, Early Welcoming Event, etc.?

- 4.8. Keep your Program Chair updated in the broad strokes of your planning. This is a team effort.

## 5. Three Conventions Before Yours (Roughly 18 months out)

- 5.1. Set up and tend your display table (if President agrees)
- 5.2. Meet substantively with your President and Program Chair.
  - 5.2.1. Review your present schedule and questions per above
  - 5.2.2. Review proposed activities, design ideas, entertainment ideas, etc.
  - 5.2.3. By the time you leave, you should have agreement on broad ideas and schedule so you can begin to execute
- 5.3. Check with the Program Chair – is the Keynote nailed down? (Depending upon the cost of the Keynote Speaker and your budget, do you need any financial assistance from the Foundation? If so, your Program Chair will need to write a proposal and present it to the Foundation). You will need to start writing down promotional introduction, and you will want to sell the program along with the meeting.
- 5.4. Post-visit follow-up
  - 5.4.1. Update your Master Schedule based upon input from your meetings

## 6. Unofficial Site Visit (Time variable, preferably one year out)

Who goes on and who pays for an unofficial site visit is a matter of discussion and personal choice. If you choose to take one, your site visit will probably focus on filling out the activities and events beyond the Big Three. Plan visits to daytime activity vendors, meeting and working with local vendors to flesh out ideas, as well as getting deeper into planning the Big Three. Visit more restaurants and continue to take notes on each which will be needed for your brochure and answer questions and requests for recommendations.

- 6.1. Pre-Visit Planning
  - 6.1.1. Identify activity vendors and schedule meetings
- 6.2. The visit itself
  - 6.2.1. Choose your time - preferably 1 year out, at the same time of year as your Convention
  - 6.2.2. Meet with activity vendors; collect brochures, pricing and contact information for the vendor point person.
  - 6.2.3. Re-visit your schedule and locations for more ideas, details

- 6.2.4. Take notes on activities even if you do not plan to include them on the schedule. Attendees may want to deviate from scheduled activities.
- 6.2.5. Start thinking about Convention gifts earlier rather than later.
- 6.3. Post-visit follow-up
  - 6.3.1. Follow up with meeting planner regarding all communications with vendors
  - 6.3.2. Begin working on vendor contracts for activities
  - 6.3.3. Update your Master Schedule and share changes with the President, your Program Chair, and the Meeting Planner. Keep the Chief Financial Officer in the loop as to all matters affecting the Convention Budget

## 7. Before You Arrive at The Convention Two Before Yours (14 months out)

By the time you get to this point in your planning, your Convention is one year out. You should have the basic outline of your Convention and many of its details planned. Your schedule of events should be fairly locked down. You should know what events are happening on which days, what special events you are planning, whether you are doing anything different from the usual schedule of events, etc. Scheduling optional activities often lags, but you should have a pretty good sense of the number and type of activities you want to offer. Hint: don't plan so many activities that attendees have little chance for free time. Attendees will want to have time to plan their own activities.

- 7.1. One Year out, prepare a short Federation Flyer Article. 500 words. See website at [https://www.thefederation.org/Online/Digital\\_Newsroom/FDCC\\_Flyer/Online/Digital\\_Newsroom/FDCC\\_Flyer.aspx?hkey=75603456-24d1-44a0-8224-ebe837ab6071](https://www.thefederation.org/Online/Digital_Newsroom/FDCC_Flyer/Online/Digital_Newsroom/FDCC_Flyer.aspx?hkey=75603456-24d1-44a0-8224-ebe837ab6071)
- 7.2. Update and block out your Master Convention Schedule in as much detail as possible
- 7.3. Prepare Board/P&O Presentations promoting your meeting
- 7.4. Prepare your proposed budget for F&B review.
- 7.5. Work with the Program Chair on a letter to the Foundation President regarding request for financial assistance for Convention Speakers to the extent that such assistance is reasonably needed
- 7.6. As before, come to the meeting with a list of issues and decisions that you want to discuss with your President and Program Chair [Charm?]
- 7.7. Invitations – discuss stationery with President and its Spouse and the Executive Director

8. Two Conventions before your Convention (One year out)
  - 8.1. Conduct presentation to Board with the Program Chair
  - 8.2. Conduct presentation to the P&O Committee
  - 8.3. Be prepared for a possible presentation to F&B
  - 8.4. Bring the materials for your Convention Display table and set it up (candy dish will lure in visitors)
  - 8.5. Meet with your Convention Team to review your list of outstanding items, questions, decisions as set forth below
  - 8.6. Decide on any entertainment, especially the band for the dinner/dance
  - 8.7. Prepare for possible Foundation Board appearance with the Program Chair
  - 8.8. Post-visit follow-up
    - 8.8.1. Update your Master Schedule based upon your meetings and discussions.
    - 8.8.2. Begin drafting your Brochure with the Program Chair.
      - 8.8.2.1. Review past Brochures for ideas and approaches. See website at [https://www.thefederation.org/Online/Events/Past\\_Events/Online/Events/Past\\_Events.aspx?hkey=c1e7ae95-14c6-4394-aa4d-be1f354a7f9d](https://www.thefederation.org/Online/Events/Past_Events/Online/Events/Past_Events.aspx?hkey=c1e7ae95-14c6-4394-aa4d-be1f354a7f9d)
      - 8.8.2.2. Review outline of elements generally found in Brochures and decide on your own outline
      - 8.8.2.3. Start with the “static” parts of your Brochure, if you have not written them already. (The pace of events will pick up steadily from here on out.)
        - 8.8.2.3.1. Restaurants
        - 8.8.2.3.2. Travel Information
        - 8.8.2.3.3. Things to do in the area
        - 8.8.2.3.4. What to wear
      - 8.8.2.4. This may sound early but drafting your Brochure will guide what details you need to nail down in the next several months (host identities, activity details and prices, travel details, etc.)

## 9. Before You Arrive At The Convention One Before Yours (5 or 7 months out)

You will need to have completed your small, informational Brochure before this meeting. Your Convention (with the exception of event details like menu, decoration, flowers, etc.) should be essentially planned because as soon as you leave this meeting, you will need to start writing your main Brochure. (Think about all the details contained in these Brochures and you will have an idea of what will have to be nailed down very soon after you leave this Convention.) While at this meeting, you will be giving more fulsome reports to the Board and P&O, as well as to the entire Convention on the last day of the Plenary.

- 9.1. Prepare and finalize your small Brochure
- 9.2. With your Program Chair, prepare your presentation to the entire Convention
- 9.3. Get the small Brochure to the printer five weeks before this Convention
- 9.4. Contact and recruit hosts. Consider having a Hosts Leader to assist with asks, instruction, and coordination.
- 9.5. Compile a list of open issues, decisions, questions to review with Convention Team.
- 9.6. Schedule working meeting with Convention Team at the upcoming Convention.
- 9.7. Select a book for Book Club with your President and Book Club host if you have not already done so.

## 10. One Convention before your Convention

- 10.1. All activity contracts finalized?
- 10.2. Foundation Appearance with the Program Chair
- 10.3. Board Presentation with the Program Chair
- 10.4. P&O Presentation with the Program Chair
- 10.5. F&B Presentation with the Program Chair
- 10.6. Presentation to Convention with the Program Chair
- 10.7. Working meeting with President and Convention Team to review any open issues, decisions, questions as above
- 10.8. Consider whether to hold a meeting of your hosts to discuss expectations and recruit ambassadors to promote your meetings
  - 10.8.1. Consider use of promo hats, t-shirts, etc. Discuss this with your President.

## 10.9. Post-visit follow-up

10.9.1.1. Write your Brochure with the Program Chair– including graphics and design. The Executive Director has a graphic designer who can assist with the design

10.9.1.2. Review list of Brochure components and decide what to include

10.9.1.3. List what needs to be finalized to complete your Brochure

10.9.1.4. Committee Meeting Schedule

10.9.2. Nail down all the little details that you need to nail down to write your Brochure

## 11. Six Months Out

By this point, most of what you will be doing will be driven by the details of your particular Convention, following up with particular vendors, planning the details of your particular events and activities. A generalized checklist will not be all that helpful, as you will have very specific items to deal with related to your specific events. That said, what follows from this point on is a list of recurring items that will need attention.

11.1. Drop dead date for deciding on the charm for your Convention, if you have not already done so. You will need lead time to get them ordered

11.2. Confirm directly with your hosts what they will be doing and that they are or will be registered for their event

11.3. Develop and implement an email and social media plan for promoting your meeting

11.3.1. Recruit some social media savvy types to help

11.3.2. Identify aspects of your Convention worthy of special mention (special children's events; special travel requirements; amazing keynote speaker, etc.)

11.4. Write a Federation Flyer article. Work with the Program Chair on this article.

11.5. Review Budget Status (ongoing) with the Chief Financial Officer and the Meeting Planner

## 12. Four Months Prior to Meeting

12.1. Finalize and Publish Brochure

- 12.2. Once the Brochure is finalized, announce that Registration is Open!
- 12.3. Reserve spaces for your hosts in their assigned activities, if necessary. Remind them *again* to sign up for their events.

### 13. Final Site Visit (3-4 months out)

The final site visit is for fine tuning your events, including décor, menus, table layouts, plenary layouts, section and meeting room set up requirements, etc. By the time you leave, you should have a good understanding of what your Convention attendees will experience.

- 13.1. Menus finalized
- 13.2. Wine, alcohol finalized
- 13.3. Decorations finalized
- 13.4. Florist Finalized
- 13.5. Meet with hotel team regarding details of events, room spaces, set-ups, times. Arrive at this meeting well-dressed and on-time and prepared to discuss details and concerns
- 13.6. Visit activity vendors as needed
- 13.7. Program Chairs
  - 13.7.1. Consider/decide upon gifts for Program Speakers, Registration Volunteers, and others who are deserving

### 14. Two Months Out

- 14.1. Keep the online Brochure and the app updated at all times with important developments and information about the Convention.
- 14.2. Make a list of all the items that will need to be delivered to your Convention. All such items will need to be collected and shipped to their destination. This is especially critical for foreign destinations where customs forms will need to be filled out.
- 14.3. Send out some social media posts and promotional emails (ongoing)
- 14.4. Confirm that all necessary signs, decorations, extras, ribbons, lanyards, etc. have been ordered for meeting
- 14.5. Mail invitations as necessary (New Members Reception, Special Friends, President's Functions, etc.) work with President/Spouse on invitations

- 14.6. Design and finalize themed attendee badges
- 14.7. Is there anything else you need printed (signs, hand-outs for events, menus, etc.)?
- 14.8. Write thank you notes ***NOW***
15. One Month Out
  - 15.1. Contact hosts to confirm assignments and registration
  - 15.2. Purchase gifts for Convention Team if you have not done so already.
  - 15.3. Through the Meeting Planner, obtain and analyze the hotel's event book with the Meeting Planner, Chief Financial Officer, and Program Chair in conjunction with your budget and brochure to ensure common ground and understanding.
16. ONGOING -- Right Up To The Convention
  - 16.1. Write and send promotional emails and social media posts
  - 16.2. Check on registration numbers
  - 16.3. Check on room block
  - 16.4. Follow-up as needed regarding rooms, registration, and any conflicts
  - 16.5. Constant review of Budget status
  - 16.6. Check on activity sign-ups, capacities
  - 16.7. Write Thank You Notes before you get to the Convention
  - 16.8. Draft Daily Emails **before** you get to the Convention
  - 16.9. Draft Social Media Posts for during the Convention **before** you get to the Convention
17. The Big Show

By now you will be in full execution mode on all fronts. Some things you may not have thought about follow.

  - 17.1. Try to get any craft projects done before the Convention officially starts
  - 17.2. The Executive Director, the Meeting Planner, the President and Spouse, the Convention and the Program Chairs (with Spouse/Significant Other) should meet with the Hotel Team to discuss the hotel's event book. Consider having the Chief Financial Officer attend as well. All details related to the hotel's plans, specifications, and costs will be discussed at that meeting, and all such details

should comport with your budget and the Brochure. Arrive on-time, well dressed, and prepared

- 17.3. Daily Budget Status Meeting every morning with the Chief Financial Officer and the Meeting Planner
  - 17.4. Check room set ups for all events and meetings
  - 17.5. Set up signs for events
  - 17.6. Check on the quality of any special FDCC breakfasts
  - 17.7. Consult with President about gratuities for hotel and FDCC staff
  - 17.8. If you have ordered tablecloths, work with the hotel or the decorator to ensure that they are on-site and ironed
  - 17.9. Divide and Conquer. Assign activities to yourself and spouse so that you are “seen” at as many activities as possible. Get face time with the members to make sure they have what they need
  - 17.10. Limit alcohol intake. It is a long week with 16 plus hour days. Take care of yourself. This is a marathon, not a sprint
  - 17.11. Organize the clothes in your closet when you arrive. It will make things more efficient later in the week. Do your ironing when you arrive. There may not be time later
18. The Wrap Up (Post Convention)
- 18.1. Submit Convention Evaluation (one month after Convention)
  - 18.2. Final Budget Review with F&B Committee (at the meeting after your Convention)

**B. Budget (See Timeline at paragraphs A.1.2.6.2; 1.5.2; 4.4; 7.4; 8.3; 11.5; and 16.5)**

Here is a sample program budget from the meeting in Banff in 2015 that you should consider for the following points. As stated in the timeline, ask the Executive Director to provide a hyperlink to past budgets for you to consider and work with the Chief Financial Officer and the Meeting Planner to create and update your budget.

PROGRAM COSTS				Budget:	Modified:	Forecasting:	Actual:
Speaker Fees/Travel/Expenses							
	Fees	MacEwan		\$25,000.00	10,000.00	10,000.00	\$10,000.00
	Hotel / Travel			\$3,500.00	1,859.04	1,859.04	\$1,859.04
	Intro Speaker			\$0.00	0.00	0.00	\$0.00
	Other Speakers			\$11,500.00	11,605.48	11,605.48	\$11,605.48
	Speaker Gifts			\$600.00	600.00	0.00	\$0.00
	CLE Materials and Mailing			\$2,000.00	2,000.00	1,584.99	\$1,584.99
	Internet			\$0.00	0.00	603.31	\$603.31
	Audio-Visual			\$55,000.00	55,000.00	61,621.51	\$61,621.51
	Coffee Breaks			\$4,000.00	4,000.00	5,674.93	\$5,674.93
	<b>SUBTOTAL:</b>			<b>101,600.00</b>	<b>85,064.52</b>	<b>92,949.26</b>	<b>92,949.26</b>

“Wow! I get to spend \$92,000!!” Look closer, my friends. Of the \$92,000, much of that is directed to fixed costs – Internet, AV, coffee breaks, etc. Your actual budget for speakers and the like is closer to \$30,000, with two very important augmentations – Foundation grants and comped rooms. The Convention Chair, Program Chair, and Meeting Planner should work together to allocate comped rooms, as there are other demands for them.

One critical thing to watch is speaker travel expenses. Make sure everyone knows and understands that they cannot agree to pay for speaker travel or rooms without the express permission of the Convention and Program Chair. There is not much room in the budget for speaker travel and accommodations. The Convention Chair, Program Chair, and the Meeting Planner should work together as a team when dealing with these issues. Consult the President on the issue of speaker costs and speaker selection.

As for Foundation funding, you and the Program Chair will need to go before the Foundation to request funds to help with the program. Check with prior Program Chairs for sample letters. Go with very specific requests for specific speakers. Be sure to phrase your request with an eye towards the purpose of the Foundation, which is set forth on their web page:

*The Foundation's purpose is to promote civil justice by sponsoring educational programs, the publication and distribution of learned articles and treatises on matters dealing with civil litigation, and other endeavors that enhance the quality of legal practice and service.*

Different requests and different circumstances garner different responses. For planning purposes, a realistic expectation for your program might be in the range of \$15,000 – 20,000. You can always ask for more if reasonably warranted, but nothing is guaranteed.

### 1. Convention Budgets

Convention Chairs are responsible for the overall budget for the Convention, and the goal is to break even. Consult the Chief Financial Officer at the outset and then often. This is not an easy task when the total budgets for the Convention can be as much as \$700,000-\$800,000. If you are

faced with a particularly expensive venue, you might be able to get some support from the F&B Committee Convention. Your President will know about this.

You will need to get your budget approved by the Finance & Budget Committee at the Convention before your Convention. Schedule time to speak with our Chief Financial Officer, Marty Bair, to prepare the budget. Remember to engage the Chief Financial Officer for all changes to the budget after initial preparation, and work with the Meeting Planner to ensure coordination and understanding. Attend F&B meetings to witness the presentations of other Chairs. Also, talk to someone who has appeared before F&B to present a Convention budget in order to know what to expect. If there are things that you have questions about in terms of how your budget is built, raise those issues with Finance & Budget Committee members. Put everything on the table. There is a lot of experience on that Committee, and the Committee is there to help you. The goal is to avoid surprises, so disclosure of uncertainty is always a good idea.

The first hurdle you must face in creating your budget is estimating the number *and type* of attendees you will use in the budget. These estimates will largely drive your projected revenue, which will largely drive your projected expenses. The best way to proceed is to look at actual and projected numbers for each of the last several meetings as well as meetings that are most like yours. Experiential history is good, but you must be mindful of the possibility of fluctuations in attendance based on venue for the meeting.

Winter Conventions should look to similar winter Conventions. Talk with your President, the Chief Financial Officer, and the Meeting Planner and look at the most recent “analogous” meetings and be prepared to explain your analysis and estimates to F&B.

The *type* of registrants matter. Generally, you make money off of defense counsel and lose money on children and less so on spouses. (The amount you can charge for kids generally does not cover the expenses they generate.) Some Convention Chairs have realized an increase in revenue where fewer young children attended, but a greater number of older (full freight) children registered. So, while it is difficult to estimate the precise mix of registration categories, your best guide may be past meetings.

Finally, you will need to review registration fees. You will need to decide what you want to charge members, spouses, and children of different ages. These decisions get reviewed and approved by the Board and Finance & Budget as part of the budget review process. It is best to build out your budget with all anticipated expenses, and back-fill with the registration fee needed to host a quality event for attendees.

## 2. Foreign Meetings

Foreign Conventions warrant careful attention and early management. They raise a number of issues – exchange rate uncertainty and unique issues with regard to customs, travel and logistics.

*Exchange rates.* We are not arbitrage experts, but exchange rates can impact budgets significantly. Exchange rates should be monitored throughout the planning process because fluctuations in the rate can make a dramatic in the cost of the meeting. Build your budget using a conservative estimate for the exchange rate and include a cushion to account for an unfavorable fluctuation. In

addition, if an exchange rate is highly favorable during the planning process, you should consider pre-paying fixed costs of the Convention. Discuss this with your President and consult with F&B about a plan of action if the exchange rate can yield a more favorable outcome on your ending budget. Pre-paying large amounts requires F&B and Board approval, but both bodies understand this issue. The more you prepay, the more certainty you bring to your budget estimates.

*Custom issues.* Research the custom requirements for the country in which your meeting will be held. Aside from the fact that an advisory note will be necessary for the brochure, you will need to provide the foreign country's custom agents with a list of all the material that you are bringing into the country – including registration materials, gifts, AV equipment, staging, etc. For example, the last time we had a meeting in Canada, they required a comprehensive list of all such items three weeks before the Convention started, and material shipped from the US had to be shipped in time to clear customs. Consider avoiding customs issues with regard to Convention gifts by purchasing a gift from a vendor in the host country. You can avoid custom requirements and, depending on the exchange rate, you may be able to purchase gifts at a discount.

*Travel issues.* Each destination has their own border requirements – passport expiration dates, what counts as criminal charges that might prevent entry and documentation needed for traveling with minor children and vaccination issues. This information is available on the internet. You will need to include all this information in your brochures. Since the goal is to avoid surprise, we also recommend separate email notices highlighting these requirements as a helpful reminder. Please note that regardless of the number or quality of admonitions, there will be instances in which a member did not heed your advice. Your objective is to minimize those occasions.

### 3. The Contracts Committee

You need approval from the Contracts Committee for payment of any expenses in excess of \$5000. The Contracts Committee will have already reviewed and approved the overall hotel contract by the time you are appointed. Once the hotel contract is approved, it is not necessary to return to the Contracts Committee for approval of increased hotel expenses, such as meal add-ons, etc. as that is a budget item, not a contract item.

However, the Contracts Committee should review contracts with outside vendors, off-site events agreements, AV, keynote speakers and musical entertainment if in excess of \$5000. The Committee does not make substantive decisions on the item under contract, but rather on provisions such as the force majeure clause(s), insurance requirements, indemnity obligations, cancellation penalties, substitutions, etc.

### 4. On-going Budget Review

You will need to monitor your budget through the planning process with regard to headcounts and room block attrition issues. Understand that the budget is the budget, but you need to monitor projections for positive or negative variances in the line items in order to achieve the most favorable outcome post-meeting.

Room block issues are critical and can be difficult to follow and understand. You must know the deadlines set forth in the hotel contract for giving notice of adjustments to the room block. If

registration is trending behind expectation, you will need to adjust your room block accordingly and notice must be given to the hotel. Collaborate with your President, Meeting Planner, and Chief Financial Officer during the planning phase.

We used to have a significant room block issue caused by the divergence between meeting registrations and room reservations. Some members reserved rooms but did not register for the meeting. Conversely, some people registered for the meeting but did not make room reservations. The Board addressed these issues by requiring members to register for the meeting before they were permitted to register for a room, thereby creating an “all-in” effect to avoid the deviation in registrations.

A day or two before the start of the convention, the Executive Director, the Meeting Planner, the President and Spouse, the Convention and the Program Chairs (with spouse/significant other) should meet with the Hotel Team to discuss the hotel’s event book. Consider having the Chief Financial Officer attend as well. All details related to the hotel’s plans, specifications, and costs will be discussed at that meeting, and all such details should comport with your budget and the Brochure. Arrive on-time, well dressed, and prepared.

Once the Convention starts, you will need to meet daily with FDCC staff to determine precisely where you stand vis-à-vis the budget. Did people drink much more than expected at the early cocktail parties? Did the President’s Reception cost more or less than anticipated? You will get real time costs from the hotel as the events take place and may need to adjust your spending up or down as the Convention progresses.

Consider starting your Convention with a list of ten things you want to add if the budget is going well, and ten things you would be willing to cut if you are over budget. Discuss this with your President.

There are ways to manage a tight budget – end cocktail parties and open bars precisely on time, cut back on passed hors d’oeuvres, manage meal choices, limit breakfasts, etc. If you are (bless your heart) faced with a Convention budget which could yield a surplus, your wish list of things to add might include better food, better booze (go with booze over food), more hors d’oeuvres, music or entertainment at receptions or events, gifts for younger registrants. If you are over budget early in the week, consider opting for a lower level of beverage service later in the week.

## 5. Daytime Activities

Daytime activities are intended to be a pass-through to the member from a budgeting perspective. Charges for each activity should be set so that the event breaks even. Be sure to consider all costs – the event itself, transportation, whether lunches would be provided, etc. Transportation can add significant cost to events. Coach busses vs. school busses → consider school busses if the trip is less than 45 minutes.

One way to approach planning daytime activities is to begin with a list of standard, non-negotiable, activities. These include such things as golf, tennis, fun run, knitting, book club, etc. Many of these take place on traditional days. You can start filling in your activity schedule by focusing on these.

Next consider which events are likely to draw more interest from attendees and spread them around so they don't compete against each other, if possible. Sometimes this is difficult, particularly where you have events that take longer than usual. In most instances, those events need to be scheduled on the day of the business meeting (the last day of the Convention), when the plenary session runs shorter. Another scheduling wrinkle to think about is the time when evening events start. Some nights begin earlier than others, such as the night of the new member reception. Others start later, such as the night of the dine with friends.

Plan for a mix of different activities to include by rating them as active or sedentary, family or adult, big draw or small draw, artsy or outdoorsy, and try to offer different types of events throughout each day. This is an imperfect science.

Scheduling events during CLE is not favored because it is unfair to the speakers who worked hard on their presentations. There may be exceptions to this rule, but it should be avoided.

Activities will vary from one meeting to the next depending on the venue and whether you have an annual or winter meeting. For annual meetings, you will need to schedule more family activities. For family activities, you will need to be mindful of the cost. Try to offer some low-cost alternatives. Check on the list of activities from prior annual meetings to gather activity ideas that can be done inexpensively. Make sure you consider transportation costs, which can be surprisingly high. If costs are relatively high for all activities, consider holding a family field day at the beginning of the Convention. These afternoon field days can be run inexpensively and allows kids to meet one another early in the week.

It may not be possible to investigate excursions on the first site visit. If that is the case, you will need to conduct such an investigation on your next site visit. You can do a great deal of research on the internet through Trip Advisor, Yelp, the local Chamber of Commerce, and the hotel website. Once you identify your initial list, you can meet with activity vendors on the next visit.

Set up interviews with activity vendors in advance of your site visit in order to determine time(s) the provider can conduct the activity; the capacity of such activity (and whether it is scalable if you need to add or subtract slots); transportation to and from the activity; and obviously the cost. We should be able to negotiate directly with many vendors to reduce their list price. High volume of participation should yield a better price point. After the initial discussions and decisions, hand over the contracting details to Accolade to close the deal, but do not abdicate your responsibilities for contracting details associated with your Convention.

One caveat. Pay attention to whether or not going through the hotel will increase costs. Hotel sponsored activities tend to be more expensive than similar activities arranged outside of the hotel. Of course, this depends on your venue and the availability of outside vendors.

## 6. Nighttime Events

### 6.1 Early Cocktail Parties

The major considerations for early cocktail parties are: (1) when to hold them; and (2) where to hold them. Question 1 turns on attendance and budget. Figure out who will be there and when. Look at the committee schedule. Once the big committees start to meet, there will certainly be enough people to hold a reception. If your budget is tight, consider skipping cocktail parties the first day or two.

As for where to hold receptions, this is something you can think about on your first site visit. These receptions are invariably held on site at the hotel. Look for interesting spots that are likely too small for cocktail parties once the Convention attendance reaches capacity. Take pictures. Be mindful that it is possible for early cocktail parties to attract as many as 200-250 people, depending on the venue and the day on which the meeting is scheduled to begin. Check the attendance at cocktail parties for like meetings and venues and review your daily headcounts as the meeting approaches.

## 6.2 Pre-President Reception Evening Event

Consider an initial welcome reception, especially for a shorter, urban meeting. You may have to plan something relatively low cost (tacos and margaritas have worked) relative to other events.

## 6.3 President's Reception

This is a marquee event for your week. Choices of the site for the Reception are generally limited and decided upon on the first visit. That does not mean that you cannot get creative and find some off-site location, but be aware of the impact on your budget of moving hundreds of people.

It goes without saying that this is the party in honor of your President (and Spouse). Start the planning with them. What do they like in terms of colors, themes, food, flowers, entertainment, etc. They may have strong preferences on some of these, and no real preferences on others.

Some things you need to think about:

*Seating.* There are different size and configurations for tables. Ask your President if they want 8, 10, or 12 tops for seating. Ask if you have a mix of different size tables, a mix of tables and high tops, etc. Finally, what percentage of the expected attendees do you want to provide seating for? It is not necessarily 100%, particularly if you want to encourage people to mingle.

*Inside/Outside Venues.* There is a decided preference amongst the membership for outside venues, if possible. That said, there is also a decided minority that will complain if the event is outside and it gets chilly. Consider outside heaters if you can afford them, as well as alternative auxiliary inside space, if available. Note that for any outside event, you need to have a planned *and reserved* inside space in case of bad weather. Your hotel representative should raise the issue with you. At some point during the day, you will also need to make the call on whether to continue with the plan to hold the event outside.

*Extras.* While much of this event plans itself, you will need to focus on the little things that make it special – incorporating your theme into the event, choosing decorations, flowers, etc.,

adding artists or musicians as can be afforded, etc. Think back to the receptions you have been to in the past and the things that you remember fondly. Then, consult with your President.

*Children's Activities, etc.* Convention Chairs also need to arrange organized children's activities for the night of the President's Reception and the dinner dance. This can prove tricky, as the age of the children attendees varies widely, and what entertains them therefore varies widely. Consider polling members who bring their children to find out what kind of activities they prefer. We have been told that older children don't want any planned activities. They want a place to hang out. Younger children are easier. Most often, these evening children's activities are run through the hotel. They have standard packages, but you can add onto these packages with entertainment or special visitors. Most hotels have a children's activities director that can customize your children's program.

#### 6.4 Dine With Friends/Dessert Party

By definition, dine with friends is largely up to the membership. You can consider adding "sponsored" fellowship dinners around themes like new or single members, section committees, international members, industry groups, etc. These have been very successful, particularly during winter meetings. We have had success at recent meetings for scheduled dine with friends with signup sheets which are arranged by the Convention team.

The Dessert Party is pretty low key. You will need to spend some time planning the location, decorations, theme, etc., but pretty much it is about the bar and the dessert. Ask your President what kind of dessert they like, think about some new dessert idea – build your own sundae, crazy donuts, etc. If you can afford it, think about entertainment (again, probably low budget), like a piano or guitar player.

#### 6.5 Theme Party

Focus on this event at the very beginning of your planning. The sky is the limit in terms of options and ideas for theme parties. There have been some great theme parties through the years at any number of different venues and at on-site facilities as well. I would make the selection of the site (or possible sites) for this event a major focus of your first site visit. Do some research about special places around your venue (think Midway, Olympic Training Facility, local museums, etc.) Contacts at your hotel might also have some ideas on where prior Conventions have held off-site affairs. Consider finding other big Conventions that have been held in your location and investigate where they went. There have also been some very popular on-site theme parties.

The reason we suggest focusing on this event as a priority is precisely because there are so many options. If you want to reach for something special, this is a likely area for doing just that. Reaches, of course, cost money. If you are going to the BMW facility or putting on a concert, it will impact the budget for your other events. (It is not a given, of course, that your "reach" necessarily is the theme party. Your reach could be for your President's Reception or Dinner/Dance. Figure out whatever your reach event is early as it will likely drive other decisions you will make.)

When deciding on theme parties, especially for annual meetings, remember that kids are invited to those parties. You will need to plan activities geared to them as well as adults. (Sled Dog Puppies!!!) Also, consider what people will need to pack for your events. If you are having a theme party that requires a costume and holding a black tie. etc., peoples' suitcases might burst.

## 6.6 Dinner/Dance

The event where you can finally relax, have a few cocktails and dance the night away. Enjoy it while it is happening. Before then, here are some decision tree items to consider.

Black tie or no black tie? Recent surveys indicate that the membership is strongly trending away from black tie events. It is also a strategic plan issue to some extent, as our membership is getting younger and more diverse. This is largely the decision of your President, with your input of course.

Plated service or buffet? This affects the budget as buffets frequently cost more than plated dinners.

Table sign-ups or open seating? This may be a particular consideration to grapple with for shorter, urban meetings where there may be a higher percentage of single members or members traveling without spouses or family.

Entertainment beyond dancing? For similar reasons, consider whether you want to offer distractions beyond dancing for single members, members attending without spouses, etc.

## C. **Site Visits**

Two site visits are reimbursed under our governance rules, but this may not be enough. Consider taking a third visit on your own if you can.

Banquet managers with whom we have worked in the past have made special accommodations for us if we let them know we are taking an extra trip on our own. The banquet manager may arrange a special room at special rates. Your willingness to do this will obviously be driven by the location of the meeting, but these extra trips have proven to be most beneficial to your predecessors. Although there is no guarantee, a request for reimbursement for the extra trip might be in order if the final budget figures allow for such a reimbursement. The objective of course is to do what is necessary to host a spectacular meeting for our members.

The Program Chair and spouse typically attend only one site visit. The Convention team should discuss in advance which site visit the Program Chair and spouse should attend. Limiting the Program Chair's attendance to one site visit was driven by the fact that all such costs are paid from the meeting budget. In the past, the Program Chairs and spouse attended the second site visit; however, some have found participating in the first site visit is best in order to identify rooms for presentations earlier in the timeline in order to facilitate preparation of the Brochure.

1. Site Visit Prep: You need plan all site visits by researching options for the site. Creating a daily agenda will help avoid wasting time. Research and communicate with local resources to identify possible activities, competing vendors and artists. Ask the hotel, "If your

best friend was coming to visit your hotel, what would you want them to experience?”

## 2. Site Visit 1 (See the Timeline)

The first visit, attended by Martha, the President, the President’s spouse and the Convention Chair (and perhaps the Program Chair and spouse), will likely focus on the Convention site itself and the surrounding geographic area. Assessing activities, hotel resources, guest rooms and space options for the main events, i.e., cocktail parties, President's Reception, Dessert Party, Theme party, Dinner/Dance. You may find there are limited options for some events, but seeing the space and the surrounding area will help you start planning and visualizing what, where and when you want to do something. Most of our Conventions are held in spectacular venues which offer opportunities and experiences unique to the locale. The first site visit is our opportunity to discover and explore what the venue and surrounding area have to offer. Create your list of activity options with the understanding that overpopulating the list is best at the beginning and you can whittle away at the list as you see during the planning what fits. The other critical element of the first site visit is talking with your President (and spouse) about his or her likes, dislikes, wants, needs, non-negotiable game breakers, tone and feel. It is your meeting, but you will want to make selections that fulfill any hopes/expectations of the President. And finally, be a sponge. Collect all the information you can about your venue and the surrounding area to sift through later. Leave with guidebooks, trail books, brochures for activities, knick-knacks for your Convention table. Look for possible local gifts while you are there.

Especially for the Annual Meeting, plan for children’s activities, sites, and costs for the same.

The Program Chair will need to focus on the meeting spaces, identifying which meeting room will best accommodate various presentations based on the expected size of the audience. Seating configurations should be considered. Most important, you may need to pick the location for the registration desk. Typically, the hotel will make available their department heads to make a presentation and answer all questions. Site Visit 2 might be best for this since the Program Chair will be present also unless the Program Chair attended Site Visit 1.

A fun activity on site visits is to see, explore and experience the local cuisine. You should plan to visit as many dining establishments on and off property as possible so that you can write about it later in the brochure. If you visit restaurants, mention to your server that you are planning a Convention for hundreds of people and checking out which restaurants to recommend. Ask to see their private dining rooms and check the capacity of the rooms. Some of our members may wish to know that information.

If you have time, you can start evaluating daytime activity vendors. As a matter of triage, you may want to start with the big events. The schedule on site visits is jammed. This is work that must be accomplished in a short amount of time. You may want to divide and conquer since there will be several of you on the first site visit. Split up and evaluate different activities, assuming others in your group are amenable to this approach.

### 3. Site Visit 2 (See the Timeline)

Site visit 2 will be made by Martha, the President, President's spouse, Convention Chair and spouse, and if not in attendance at the first site visit the Program Chair and the Program Chair's spouse. See the timeline for your schedule. This is the time to finalize menus, event details (like choosing flowers and table clothes), meet with the hotel personnel to finalize all the details with them, finalize hotel sites for everything, including program meeting rooms, keep looking for gifts if there are some you don't yet have, etc.

### 4. The Optional Visit (See the Timeline)

This may only be for the Convention Chair. Focus on things that you lacked time to properly evaluate on the Site Visit 1 and 2. Excursions may be a big focus of this visit for the Convention Chair's use. Be wary of selecting an excursion unless you have experienced it yourself.

This visit includes wine and food tasting. You can pick up valuable tips during the tasting, such as the fact that it may not cost more to have different wines offered for different events during the week. This may not always be the case, but the tasting is a learning opportunity.

As for food tastings, keep in mind whether you are interested in sit down dinners or buffet style service. It is possible that certain "sit-down" food may not be available for buffets. This could be an important time to discuss the details of breakfasts, an often overlooked but important part of menu planning. Ensure there is some variety in breakfast offerings if you intend to provide a separate FDCC breakfast location.

**VERY IMPORTANT:** Impress upon the hotel that our members do not like to stand in line for anything → breakfast buffets to bars. Also, ask about coffee stations.

## **D. Registration**

**Registration file:///C:/Users/Marc/Downloads/Registration\_Overview\_and\_Gu.pdf**

Registration is the first contact members have with the Convention so you want it to be a pleasant and speedy experience for them. Traditionally, the spouse of the Program Chair handled the registration desk. Spouses created a Registration Committee to recruit volunteers and coordinate activity for the registration desk, but the Convention team can opt out of having the Registration Committee run the registration desk if they wish to do it themselves. The Registration Committee should coordinate with the Head Quarters Management Team.

### 1. Recruiting volunteers – The Program Chair should delegate this duty.

First email: Plan to send out the first email to those who signed up to volunteer for registration at the previous Convention approximately 3 months before your Convention. The email should include the registration schedule and ask those who signed up to indicate which shifts they wanted to work. Consider reaching out to the spouses of members admitted in the last year and explain that working registration is a great way to meet other members and their families. Follow up with subsequent emails as needed until all time slots are filled.

There are several volunteers who are more than willing to work multiple time slots if you are having trouble recruiting volunteers. Do not hesitate to ask. The best way to find them, if you don't already know who they are, is to ask recent registration chairs (all of whom are generally on that list anyway).

Consider scheduling 3 people per shift for most shifts, but especially early in the week when the volume is higher. Try to schedule experienced with inexperienced people. There are so many experienced people that enjoy working registration, the desk will be handled well once you have recruited/coordinated the time slots for volunteers.

DO NOT FORGET to give volunteers a registration ribbon for their name tags.

## 2. Schedule

Registration is generally open during the morning and afternoon. Put a printed schedule posted on the registration desk and make sure the dates/times for registration are included in the brochure. Registration should open at 7:00, especially early in the week, so that members can pick up packets before CLE starts. Plan on having 3 – 4 volunteers working the desk on the early shift in the first day or two of the meeting.

Other considerations: You should be mindful of what else is happening during the Convention. For instance, we close registration during the opening session and during the keynote address so that volunteers can attend.

Also, close registration early enough to allow volunteers time to get ready for cocktail parties.

## 3. Set up

Ideally, registration should be in a room that can be locked so you do not have to break down the desk every night. If possible, registration should be located near the Accolade “war room” because you and members will have questions that only the Accolade team can answer. Locating registration in an area that gives easy exposure to our sponsors should also be a consideration. It's nice to have several tables or stations set up so that there's enough room to set up the different stations which can include:

- registration packets
- Convention gifts
- charms
- waivers for children's' activities
- table sign up for dinner dance (if there is one and if you choose to have reserved tables)
- registration volunteer sign up for next meeting-the registration chair for the meeting provides this
- foundation raffle

Signs in plastic frames can be used that identify each station.

Consider writing registration desk instructions for the volunteers to refer to. Work with Headquarters to ensure that the instructions are accurate and complete. It should include what every member should receive upon registration, what the different notations on the registration envelopes mean, etc.

You can also promote Convention events at registration. If there is room it's nice to have a few tables and chairs so members can sit down, fill out forms, get organized or just visit.

As discussed above, registration volunteers receive a gift and thank you note. Speakers also receive a gift and thank you note. I would suggest putting the speaker thank you notes in their registration packet. That way you don't have to find a specific gift for each speaker. You can hand out thank you notes and gifts to registration volunteers when they show up to work their shift.

#### 4. Other Registration Issues

You will get questions about where things are. Get acquainted with the layout of the hotel before registration starts.

Expect to get questions about activities, i.e., when and where they start, whether lunch is provided and what to wear. All of this is probably in the Brochure. Keep the app handy and review what is coming up each day.

Consider getting the volunteers on the last shift of the day a refreshing adult beverage. This has proved to be most popular with volunteers.

#### **E. Things you need to write/produce**

Below is a list of the various written work product generated for each meeting. Be forewarned that other things will pop up. These written materials provide a good backbone/timeline for when things need to be done.

You should review samples of each item as soon as you are appointed. Old Save the Date cards, mini-brochures, or Brochures may be your best source for your own ideas about your Convention; however, at a minimum, these documents will provide a blueprint for what must be included in each of the documents. Another obvious starting point is your own experience in attending prior Conventions. Please consider in your planning what you have enjoyed and what you thought worked well, but always “play to your strengths” in creating your conference ideas.

Other helpful process hints. As Program and Convention Chair, keep things organized in spreadsheets which can be shared with the Convention team. Google docs or a similar platform that is easily shared and amended is an excellent tool. It is important to keep everyone on the same page. In this way, you can update the team as you add/drop activities or make decisions about events. Include the name, description, detail, time, etc., for events. Your spreadsheets could be

helpful to the graphics designer that will populate your marketing materials, i.e., save-the-date and Brochures.

Selection of a theme can be fun! You should consider a main theme and perhaps sub-themes. It is quite possible for your themes to change in the early planning, especially after your first site visit which will confirm what is possible at the venue. Check the list of old Convention Themes before the first site visit. It may give you ideas or save you from duplicating an idea from a prior meeting.

### 1. Save The Date Handout

*Timing.* You will want to start publicizing well ahead of your Convention, but not so early that you infringe on the marketing of a prior Convention. Consider circulating a “Save-the Date” handout two meetings ahead, but check with your President and the Convention Chairs ahead of you to confirm this is acceptable.

*Content.* You will need identify the theme of your Convention by the time you send your “Save-the-Date” card. You can “Theme up” all the other stuff later, but try and get your big tag line nailed down early (“Picture Perfect Banff,” “Chart a New Course,” “Maison Richelieu, it's cheaper than Motel 6 and we'll leave Le Lumiere on for you.”) Highlight one or two spectacular things and, of course, the date. Samples are available to you through the FDCC headquarters, and past Convention and Program Chairs are a good resource too.

*Distribution.* You should discuss with your President how and when you want to distribute this handout as well as the mini-brochure and Brochure discussed below. Most people include these handouts in the registration packets two Conventions prior to their own. Consider whether you want to distribute to other targeted audiences (for example, new and recent members, frequent attendees, CCS and I3 participants).

### 2. Stickers

Whenever you first roll out your Convention publicity (two or three meetings before), you will want to have your “stickers” ready, assuming you want to use them. If you choose to use the stickers, you will need to recruit friends to distribute them and promote your meeting.

### 3. Convention Display Table

*Timing.* At least two Conventions ahead (see note above). Depending on what you want to do, there can be some significant lead time for assembling your presentation. You can consider using a poster board display or other visual representations of your Convention venue or theme. Consider shipping materials well in advance of the meeting for which you are planning your display. You should plan such presentation for the two meetings preceding your event and you should also consider displays at other events such as CCS and I3.

*Content.* Anything you want. Dare to be different in attracting attention to your display and your meeting. Have fun collecting things for your table. Candy dishes to draw in the crowds are always a good idea, but take responsibility for filling the dishes periodically. Do not count on the registration staff. They are usually quite busy themselves.

#### 4. Presentations to the Board and P&O

Expect to give several presentations to the Board and the P&O Committee. These presentations generally start two meetings before your Convention, but you could be asked to offer a few comments as far as three meetings out. Watch the Board and P&O agendas carefully, as that may be your first notice to have a presentation ready. The P&O meetings are far more critical for the Program Chairs because you must use this time to create energy for your event and pin down section chairs on their programs. Be prepared to establish deadlines for the section chairs.

#### 5. Small Brochure

*Timing.* Should be ready to go at the meeting which precedes your meeting. Remember to provide lead time for printing and to get it into Registration Packets. Plan to send your material to the printer at least four weeks before the Convention at which you intend to circulate them. Check the calendar of events to check for other FDCC meetings at which you can circulate the small brochure.

*Content.* By now, you should have much of your event planned. For Convention Chairs, you should know what events you will be holding on which days, special events you want to highlight, etc. You can be creative here. There have been different styles for these. You must highlight the basics – registration details, hotel reservations, dates of Convention, dates of major events (including committee meetings, which drive many members' travel decisions), keynote speakers and other program highlights, and travel requirements and tips. Focus on things that will excite people about your Convention and information they will need to plan their trip. Samples are available to you through the FDCC headquarters, and past Convention and Program Chairs are a good resource too.

#### 6. The Main Brochure

*Timing.* You must have the Brochure in final form by the time of Registration online for your meeting. The Brochure is needed to allow attendees to register for events, so push to get it done early. For winter meetings, registration usually goes live by late October or early November. For annual meetings, plan on registration opening in early April.

*Content.* Start building the Brochure from the moment you start planning. Hopefully you will have built much of the content for your Brochure already (see tips re spreadsheet above). If you have added descriptions of programs and events as you put the pieces together, you will be ahead of the game. You can give your spreadsheet entries a final review to add stylistic touches and thematic consistency once you have everything pulled together. The Brochure should now be ready for the graphics person.

Also, many parts of the Brochure can be completed ahead of time. For example, all Brochures have sections dealing with travel and accommodations, what to wear, expected weather, dining choices (in and outside of the hotel), things to do in the surrounding area (not sponsored by the FDCC), etc. Write those portions of the Brochure (months) in advance.

Helpful Hint: Sit down with a pile of old Brochures early in the process. Identify elements common to all Brochures. See Outline of Common Brochure Elements. Once you have the list of common elements, you can decide what you will pattern your Brochure after and decide the order of presentation. There is a pattern to the Brochures and, although you can add your own personal touches, the past Brochures will provide a good blueprint for your planning as you mold the content (90% of which is well-defined) to your own Convention. The goal is to make your Brochure unique, fun, and interesting.

### *Specific Elements.*

Charm. You now need to have your charm chosen by the time the brochure is published as you need to provide a description in the brochure to generate orders. Work with the President (and spouse) on this early. According to tradition, the President and his/her spouse selects the charm. See the list of charms already chosen in the “Past Meeting” section of the Blue Book.

Foreign Conventions. You need to include warnings about passports, as well as disclose any odd border issues (i.e., proof of ownership of children, what blemishes from members past might cause problems, vaccination issues, etc.).

*Distribution.* Some Presidents prefer printed Brochures; some prefer digital Brochures. Some prefer physical Brochures be mailed home, others do not. Be sure to discuss this with your President. Consider the estimated costs for printed Brochures (\$25,000-\$30,00 for printing and mailing) vs. the potential benefits of increased visibility gained by sending Brochures home so that spouses can see them.

*Other Communication.* Remember to effectively use the Friday Fives and your own personal e-mails to address significant developments.

## 7. Presentation to the Convention

Historically, the Convention and Program Chairs do a Convention preview at the Convention which precedes their meeting. The presentation is given after the business meeting in the last plenary session. Your presentation can be as creative or straightforward as you like, but they should be designed to generate interest in your Convention. Be creative and dare to be different. These presentations are typically 15 minutes in length. Speak with the Program Chair about the amount of time allocated for your presentation. Expenses related to your presentation can be paid from the Convention budget.

## 8. The FDCC App

The FDCC app should be effectively used by you to promote your Convention, to coordinate activities, to announce matters of significance, to foster attendee interaction, post photographs, etc.

9. Social Media Posts

As part of the promotion of the Convention and also during the Convention, consider using pre-programmed social media postings which are queued up and ready to go. Coordinate this with Headquarters in the planning process and/or recruit someone to be your social media promoter.

10. Daily Emails

You are expected to send out emails every day describing upcoming events, presenting interesting facts, etc. Bernie sends them, but much of the content can be prepared prior to the meeting. Consider drafting a thought, joke or quote of the day to be included. Bernie will add in news from the day before and usually a weather report. Ask your President whether he/she wants them to go out first thing in the morning or in the afternoon the day before. Samples are available to you through the FDCC headquarters, and past Convention and Program Chairs are a good resource too.

11. Federation Flyer Articles

You will need to write at least one Federation Flyer article one year before your Convention and another longer one six months before your Convention. You will also need to write another Federation article right after the Convention. The “before articles” largely can be cribbed from the mini and main Brochures. The hard part is keeping them short. By the time you write it, you will have already generated tons of content.

The “after” article is an opportunity to thank those that made the Convention a success and to reflect on the amazing opportunity you were given to host the Convention. This is an opportunity to mention highlights from the meeting.

12. Thank you notes

You will be writing a boatload of thank you notes. Write them **before** the Convention starts. Don and Doreen Myles figured out a way to get them printed so they looked like they wrote them. Brilliant! It saved them a ton of time. For those who choose to handwrite them, you better get started early. Get the speaker and host notes done in time to have them stuffed in the registration packets. Otherwise, it is a nightmare trying to chase everyone down.

- Convention Chair Notes – everyone to whom you gave a gift plus all of your hosts
- Program Chair Notes – everyone to whom you gave a gift
- Registration Chair – the registration volunteers

13. Convention Evaluation

After your Convention, you need to write an evaluation of your Convention. The evaluation should provide an objective assessment of the challenges which arose, what worked well, what did not work well, what you would have changed, things you thought of while you were doing the planning and execution. This evaluation should serve as a useful tool to educate future meeting chairs. Do

not wait for the post meeting survey results to prepare this evaluation. This is your objective assessment through the lens of the Convention Chair. Within thirty days of the conclusion of the Convention, the Convention Chair shall provide this Evaluation to the Convention Review Committee which consists of the Secretary-Treasurer (who serves as the Committee's Chair), the immediate past four Presidents, and the Chair of the Sites Committee, and you are to meet with that Committee to discuss the Evaluation. See the Resolutions, July 2019 at Section IX, paragraph T.

## F. Gifts

The Convention Chair must select a welcome gift for all attendees. Make it something unique and memorable since it is the one thing which all attendees will take home after the meeting. Some decisions you will need to make – one gift per family v. gifts for all attendees; separate children's gifts, and if so, do you get different things for different age groups; if you pick clothing items, do you pick things that require different sizes (shirts) or not (pashminas).

As you think about buying gifts (Convention and otherwise), consider where to buy them. If your Convention is in Canada, Switzerland or Hawaii, you may want to pick gifts you can purchase at the site of your Convention to avoid shipping, customs, etc.

Here is a list of all of the other gifts you should consider getting:

### 1. Convention Chairs (Cost of these gifts **are not** in the Budget):

- Gifts for the President and President's spouse (consider teaming up with the Program Chair)
- Gifts for the Program Chair and their spouse/Registration Chair
- Gifts for FDCC staff (consider joint gifts with the Program Chair)
- Gifts/recognition for people who went above and beyond for you in some way (purely optional but there were a handful of people who worked hard at particular activities that we wanted to recognize)

### 2. Program Chairs (These costs are budgeted):

- Speaker gifts (Around \$10/speaker, depending on budget and number of speakers)
- Registration Volunteer gifts. Again, these can be nominal and wrapped into speaker gift budget. (Food is cheap, easy, and well received. It's even better if you can think of something that goes with your Convention or Program theme, something special from your home, etc.).

PS. Speaker and registration gifts can be the same thing.

### Program Chairs (These costs are not budgeted):

- Convention Chair and spouse
- Gifts for FDCC staff (consider joint gifts with the Convention Chair)

- President and Spouse (if you don't do it jointly with Convention chair)
- Special helpers. Purely optional, but again there were people who helped with the program in ways that were above and beyond that we wanted to recognize.
- Don't forget the AV guys. They work hard. (Food is definitely the way to go here.)

## **G. Miscellaneous**

### 1. Child Care

Childcare has become, and will continue to be, an increasingly important aspect of meeting planning. If possible, when planning evening programs, consider having children's activities start just before the adult activities so parents can drop their children off. Watch out for the New Members' Reception, which starts earlier than most. Make sure new members have a place to bring their children. There are not usually a lot of children with first time attendees but there are some.

Consider running a kid's camp in the morning to free up parents to attend CLE. Many of our members are married to attorneys and they both will want to attend CLE. A prior attempt at this program was well received. It ran from 9:30 a.m. -12:30 p.m. early in the week and 7:30 a.m. - 12:30 p.m. later in the week when section meetings started. Be creative in managing this event by recruiting college age volunteers and waive their registration fee. The challenge will be to recruit workers and find a "Day Camp" director that can pull together a program the kids will enjoy.

### 2. Scheduling Committee Meetings

Scheduling committee meetings has become a serious challenge and will only get more difficult as we move to shorter, more compact meetings. The order in which meetings are scheduled, as well as which meetings must be scheduled, are issues that must be decided in consultation with the President and Board Chair. The starting point for you should be the committee schedule from the last meeting. Check to see if any other meetings need to be added or removed.

### 3. Other Convention-related events for which you are not responsible

There are a number of events that can occur during a Convention for which the Convention Chair is not responsible. These can include the Past Presidents' Dinner, the Special Friends' Dinner, the Officers' Dinner, and other similar meetings, breakfasts, etc. For some reason, these show up on the Convention Budget but are paid for out of general funds. Your President will take care of these events but may request your opinion and/or assistance. Other than perhaps being asked to provide input on possible locations, coordination with other Convention activities or the like, these events will not require your attention.

### 4. Event Hosts

Consider an event host team to help you. Choose multiple hosts for each event, on the theory that this might prompt people to attend. People will generally say yes, but you will need to coordinate

assigning hosts to excursions that have already signed up for, or plan to participate in the activity. Remind your hosts to register for the activity before it is full. Sign your hosts up for the activities at the outset, or make sure a spot is reserved for them. (The timing here is tricky, as you often ask people to be hosts earlier than activity sign-ups open.) Talk to each host personally.

Consider asking newer members to host. Consider whether your hosts are active or sedentary when picking activities for them. Think about who your President might want to host the President's reception, or perhaps even ask them. Some hosting duties require actual work or particular personalities. Choose the hosts for events that require real work wisely.

#### 5. Networking Space

Consider adding some rooms or meeting areas for networking. Discuss this with your Programming Chair and President. Options are limitless, but can include a place for coffee in the morning, ice tea or soft drinks in the afternoon, or a late-night lounge.

#### 6. Photographer

Consider hiring a professional photographer for the Convention. There is increasing support among the officers for high quality photographs for future visibility efforts.

### **H. Resources available to you as Program and Convention Chairs**

**[https://www.thefederation.org/Online/Resources/Resources for Convention Program Chairs.aspx](https://www.thefederation.org/Online/Resources/Resources%20for%20Convention%20Program%20Chairs.aspx)**

Resources are available to you as Program and Convention Chairs on the FDCC website. Click on the Resources tab and then click on the Leadership Resources and then click on the Resources for Convention & Program Chairs to access the following:

- Convention Chair Handbook and Convention Timeline
- Registration Chair Timeline
- Registration Overview & Guide
- Program Chair Handbook
- Program Chair Guide
- Program Chair Timeline
- Exhibitors Handbook
- I-3 Guide

Also under the Events tab, all brochures for meetings dating back to 2017 are available with the presentation materials.

Under the Resources tab, click on the Governance Resources tab, and then click on the FDCC Resolutions, July 2019 and scroll down to Section IX for the Resolutions that apply to your duties.

Prior Convention and Program Chairs are an excellent resource for you and want you to succeed. Reach out to them.