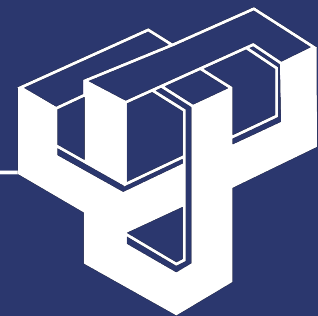


2016 ANNUAL CONFERENCE

SO YOU THINK
YOU CAN HOST?:
HOW TO BID FOR A
CONFERENCE



Presented By:
Christina Aichele, NACURH Conference Resource Consultant
Angela Powell, On Campus Marketing
Jacob Crosetto, NACURH Associate for Finance

BEFORE YOU BEGIN THE BIDDING PROCESS

- **Things To Do**

- Speak to your advisor and/or any other administrators about the possibility of gaining school support.
- Read the NACURH Policy Book (Conference Section).
- Read your region's governing documents/policy book.
- Tour your campus to make sure you have the facilities needed to host.
- Attain past conference bids and wrap up reports; utilize them as resources.
- Contact your Regional Director for specific information about bidding on the regional level and bidding resources.
- Contact the NACURH Conference Resource Consultant for the Host School Acknowledgement Form and additional bidding resources.



THINGS TO CONSIDER FOR YOUR BUDGET

- What are the NACURH or regional breakdowns of the budget?
- How detailed does the budget need to be?
- Staff/RBD/Executive/SEC/NACURH Boards costs
- Conference insurance – do you need to purchase additional?
- Contracts – when do you sign? Who signs?
- Banking costs or administrative fees
- How do you plan to keep people accountable to the budget?
- What is the break even point? (See NACURH or regional policy or your finance officer for this)



BUDGET PLANNING AND DEVELOPMENT

- Contact your regional finance officer or the NACURH Conference Resource Consultant for a conference budget template.
- All regional conference budgets are different – consult your regional policy book/governing documents.
- Consult the NACURH Policy Book for NACURH Policies governing regional conferences.



THINGS TO CONSIDER FOR YOUR BID

- **Insurance**

- Will the host school be able to obtain liability insurance to cover the conference?
- What will the cost of the insurance be?
- NACURH policy requires the host school to submit a certificate of insurance or a letter from the institution indicating the insurance coverage to the NACURH Conference Resource Consultant prior to the conference. For the Annual Conference, the insurance certificate is due to the CRC by April 15th, prior to submitting a bid. For regional conferences, a copy of the insurance policy or a notarized letter stating the institution's liability must be received by the CRC no later than thirty (30) days after winning the bid for the conference.



THINGS TO CONSIDER FOR YOUR BID

- **Facilities**

- What are the requirements/needs?
- Signing of contracts-be sure all facility arrangements are in writing.
- Contingency plans if the facilities become unavailable
- Are facilities large enough for mass gatherings/large events?
- Are there regulations about food? Serving costs?
- Accessibility for those with disabilities or special needs?
- What does your office of disability services consider reasonable accommodations?
- Plan for “signers” at large gatherings for attendees with hearing impairments.
- Hidden costs: tech support, set-up charges, charges for tables, chairs, security, etc.



THINGS TO CONSIDER FOR YOUR BID

- **Working With Hotels**

- Parking and fees-think about vans and buses. Costs?
- Keys: How many per room? Who will distribute? Lost key cost?
- How will you handle or coordinate check-in and check-out?
- Reserving blocks of rooms - be sure all rooms have 2 double/queen beds or can hold 4 delegates or 2 advisors, etc.
- Will delegates make reservations directly with the hotel? How will the hotel do billings?
- Are any deposits required up-front?
- Who signs contracts?
- Hotel policies-do they understand your conference? Door decs?
- Security - Will it be provided?
- Cutting off or blocking phones, movie channels, room service, etc.
- Hospitality rooms, meeting rooms, complimentary rooms for each specified room that you book-make sure these are appropriately noted in your budget.
- Can food be brought in or do you need to work with hotel catering?



THINGS TO CONSIDER FOR YOUR BID

- **Safety and Security**

- Needs-what is required by the facility, the institution or department policy?
- What is needed based on the location of the facilities?
- Will a traffic control guard be needed for walking across a busy street? If so, is there a cost?
- Costs
- Communication-radios, cell phones
- How will they be identified?
- Student vs. Professional
- Hotel and conference events
- Training



THINGS TO CONSIDER FOR YOUR BID

- **Volunteer/People Power**
 - Needs for volunteers
 - How many will you need for various areas of the conference?
 - Recruiting volunteers; training and recognition of volunteers
 - Scheduling and assignment of volunteers to meet needs of committees and tasks



THINGS TO CONSIDER FOR YOUR BID

- **Transportation**
 - What type/needs?
 - Accessibility for those delegates with special needs
 - Charge by mile, hour, day?
 - Insurance, license requirements
 - Shuttle schedules
 - Contract for vehicles and drivers
 - Who can drive?
 - If bringing delegates to off-campus events, does your campus have a policy concerning schools driving themselves?



THINGS TO CONSIDER FOR YOUR BID

- **Registration**

- Timeframe - What are your dates?
- What will be included in the registration process?
- Set-up and check-in process
- Process for confirmation/notifications to schools in a timely manner
- Invoices
- Conference cap - Will there be a conference cap? How will you handle alternates, cancelations, etc.
- Have you reviewed NACURH policy that defines conference registration and check-ins (i.e. No Pay/No Key policy)?



THINGS TO CONSIDER FOR YOUR BID

- **Programming**
 - Requirements and needs for programming rooms/facilities
 - Contracts for speakers - When do you need to sign a contract or agreement?
 - How will you recruit programs?
 - How will you select programs?
 - What will the programming “tracks” be?
 - What are the tech needs-what equipment do you have access to? What are the costs?
 - Do you need “tech support” for any programs? Is there a cost involved?



THINGS TO CONSIDER FOR YOUR BID

- **Sponsorship**
 - Conference sponsors
 - Corporate Partners/Corporate Sponsors
 - Money, items in-kind
 - Advertising/recognition
 - Deadlines
 - Contract - be sure all agreements are in writing



THINGS TO CONSIDER FOR YOUR BID

- **Summits/Site Visits/Semi-Annual (NACURH Annual)/Pre-Conference**
 - Housing-hotel or on campus-cost?
 - Food
 - Schedule
 - Availability of conference staff
 - Meeting room space
 - Tech needs



NACURH AND REGIONAL CONFERENCE POLICIES

- It is IMPERATIVE that you check your regional policy book/governing documents regarding conference bidding and hosting!
- It is IMPERATIVE that you check the NACURH Policy Book regarding conference bidding and hosting!
- PLEASE BE SURE TO READ BOTH DOCUMENTS!



CORPORATE PARTNERSHIP: ON CAMPUS MARKETING

- **What They Do**

- Provide a gift for the First Year Experience award winner
- Present the award at the banquet
- Advertisement - copy-ready and Guidebook
- Representative(s) at each regional conference
- Program presentation at conference (at least one)
- Pens (1 per delegate - Fall Regional Conference)
- Pens/Pads for NCCs - Fall & No Frills/Minis Conferences
- Souvenir Cup (100 per conference – No Frills/Minis)
- \$150 for the Advisor social (Fall Regional Conference)
- \$100 for the Advisor social (No Frills/Minis)
- \$600 for the Advisor social (Annual Conference)
- Goodie Bags (1 per delegate) provided for Annual Conference



CORPORATE PARTNERSHIP: ON CAMPUS MARKETING

- **What They Need From Conference Hosts**
 - Conference staff provides the First Year Experience Award (per regional policy)
 - Time at the banquet to present the award
 - Printing of advertisement, no cost to OCM
 - Registration fees waived for 2 OCM staff; single rooms provided
 - No vendors in similar business may display, advertise or otherwise have presence at the conference
 - Conference delegate or school list as approved by RBD/Executive Board/SEC



CORPORATE PARTNERSHIP: ON CAMPUS MARKETING

- Please note that the previously mentioned corporate sponsorship information is provided regardless of the host school
- Take this information into consideration when bidding so you are not budgeting for pens and so that you build in costs for your OCM representative's attendance, etc.
- Have Questions? Call or e-mail Angela Powell, Public Relations Manager, 1-800-220-4237 or apowell@ocm.com.



WRAP-UP REPORTS

- Every school hosting a regional and Annual conference MUST submit a wrap-up report by the specified date. It may be helpful to put a timeline for completion in your bid; please note there are set due dates for wrap-up reports.



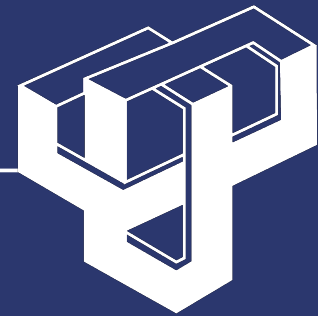
QUESTIONS AND RESOURCES

- Contact the NACURH CRC with questions and for resources:
crc@nacurh.org
- Contact your Regional Director with questions and for resources:
 - CAACURH: ca_director@nacurh.org
 - GLACURH: gl_director@nacurh.org
 - IACURH: ia_director@nacurh.org
 - MACURH: ma_director@nacurh.org
 - NEACURH: ne_director@nacurh.org
 - PACURH: pa_director@nacurh.org
 - SAACURH: sa_director@nacurh.org
 - SWACURH: sw_director@nacurh.org



2016 ANNUAL CONFERENCE

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HOW TO HOST A CONFERENCE



NOW THAT YOU HAVE WON THE CONFERENCE...

- **Things To Do**

- Develop your team!
- Read the NACURH Policy Book (Conference Section).
- Read your region's policy book/governing documents.
- Attain past conference wrap-up reports to utilize as resources.
- Make sure the NACURH Conference Resource Consultant has ALL your required paperwork and information.



ADDITIONAL BUDGET ITEMS TO CONSIDER

- Using the budget template
- Monthly updates
- Changes to budget/approval by RBD/Executive Board/SEC/NBD



ADDITIONAL FACILITIES ITEMS TO CONSIDER

- When will your vendors need final numbers?



ADDITIONAL HOTEL ITEMS TO CONSIDER

- When will your vendors need final numbers?



ADDITIONAL VOLUNTEER ITEMS TO CONSIDER

- Develop an hourly volunteer schedule based on needs.



ADDITIONAL TRANSPORTATION ITEMS TO CONSIDER

- Who can drive? Develop a driving schedule.



ADDITIONAL REGISTRATION ITEMS TO CONSIDER

- Do your dates give you enough time to complete what you need before your conference?
- Conference cap – Have you determined a cap per school?



ADDITIONAL PROGRAMMING ITEMS TO CONSIDER

- Be sure all speakers have a signed contract or agreement.



ADDITIONAL SPONSORSHIP ITEMS TO CONSIDER

- Corporate Partners/Corporate Sponsors: review the OCM agreement/work with Angela Powell; review the Guidebook agreement/work with the NACURH Chairperson and/or NACURH Conference Resource Consultant.



GUIDEBOOK

- Please ask the student on your conference staff who is/will be responsible for creating their conference's guide to contact the NACURH CRC directly at crc@nacurh.org with their email address *prior to beginning the process of building...*it's that simple! They will be provided with instructions from that point about how to build their guide on NACURH's "team."



GUIDEBOOK CONTINUED

- Weekly Webinar Sign-Up and Info:

<http://pages.guidebook.com/CS-Weekly-Webinar.html>

- Detailed Support Site to Freely Search Instructional Materials:

<https://support.guidebook.com/hc/en-us>

- Intro to Guidebook GEARS:

<https://support.guidebook.com/hc/en-us/articles/203743214-Solutions-Consultant-Webinar-Intro-to-Guidebook-Gears>

- Video Overview for Numerous GEARS Modules and Funtionalities:

<https://support.guidebook.com/hc/en-us/search?utf8=%E2%9C%93&query=Video>

- Overview of How to Use the Guidebook App:

<https://support.guidebook.com/hc/en-us/articles/202891364-Using-the-Guidebook-App-for-end-users->



ADDITIONAL WRAP-UP REPORT ITEMS TO CONSIDER

- Your region or the NACURH Conference Resource Consultant can provide you with a wrap-up report checklist to aid in writing your wrap-up report.
- You may contact the NACURH Conference Resource Consultant or the NACURH Information Center (NIC) to past hosts' wrap-up reports.



TIPS FROM OUR 2014-2015 CONFERENCE HOSTS

- Build a strong team. As soon as you trust the team you have and you work together, things will get done more efficiently.
---Shelby Anderson, SAACURH No Frills 2015 Chair
- Plan, plan, plan ahead. But, also be comfortable with last minute changes. Strike a balance between intense planning, and going with the flow!
---Emily Braught, MACURH No Frills 2015 Chair
- Make sure your conference evaluation is prepared and ready to send after your conference.
---Andrew Raj, IACURH No Frills 2015 Chair
- The conference isn't over until the wrap-up report is submitted!
---Tyler Nees, PACURH No Frills 2015 Co-Chair



QUESTIONS?

