Event Management Planning
Hotel Contract Review Process:

**Region Conference**
- Region votes for conference location
- Top 3 date choices are sent to Director’s Advisor
- Director’s Advisor sends selected conference dates to Region Director (Director)
- Director with input from Host Committee (Host) decides to either find the hotel themselves or use 3rd party

**Hotel Contract**
- Top choice is notified to start the contract process
- RFP’s reviewed by Director with input from Host Committee
- RFP sent to hotels in conference location listing requirements needed

**Flowchart**
- Director/Host receives contract
- Director/Host completes checklist
- Contract and completed checklist sent to National for review
- National reviews contract: Requested modifications are e-mailed to Director
- Phone call (if needed) can be scheduled to discuss requested modifications

**Current NAWIC National President Initials each page, signs contract and addendum (if applicable)**
- copy of fully executed contract/addendum (if applicable) sent to National for file
Hotel Contract Review Process:

Region votes for conference location

Top 3 date choices are sent to Director’s Advisor

Director’s Advisor sends selected conference dates to Region Director (Director)
Hotel Contract Review Process:

1. Top choice is notified to start the contract process.
2. RFP's reviewed by Director with input from Host Committee.
3. RFP sent to hotels in conference location listing requirements needed.
4. Director with input from Host Committee (Host) decides to either find the hotel themselves or use 3rd party.
Hotel Contract Review Process:

1. **Director/Host receives contract**
2. **Director/Host completes checklist**
3. **Contract and completed checklist sent to National for review**
4. **National reviews contract: Requested modifications are e-mailed to Director**
5. **Phone call (if needed) can be scheduled to discuss requested modifications**
6. **Revised contract is reviewed and approved by National**
7. **If an addendum will be used, hotel executes it first**
8. **Copy of fully executed contract/addendum (if applicable) sent to National for file**
9. **NAWIC side executed contract/addendum (if applicable) sent to hotel to be fully executed and return for Region’s file**
10. **Current NAWIC National President initials each page, signs contract and addendum (if applicable)**
Hotel Contract Review Process:

If you have any questions, contact Crissy Ingram NAWIC Executive Administrator at crissyi@nawic.org or 817-877-5551.
Roles/Responsibilities: Region Director

• Plans and prepares the agenda and business
• Appoints
  o Conference coordinator(s)
  o Conference Secretary
  o Parliamentarian
• Approves plans
• Presides over the conference
• Circulate action minutes
• Prepare conference message
Roles/Responsibilities: Coordinator(s)

- Appoint committee chairs and members including steering committee.
- Liaison(s) between Region Director, committee chairs and chapter members
- Hotel liaison
- Written Communication to Region Director
- Preside over committee meetings
- Budget updates
- Prepare conference message
Roles / Responsibilities:
Roles/Responsibilities: Steering Committee

• Coordinator, Secretary, Treasurer, Chapter President
• Lay groundwork and outline duties of committees
• Outline the duties and timeline of each committee for each phase of the conference activities.
Checklists/Timeline:

• Taking the mystery out of who does what when
• A checklist has been added as a tab on the Budget template
• It can be filtered by:
  o Whether your region does the actions
  o Who is responsible for the action
  o Deadline dates
  o Whether it is a budgeted item
• Deadline dates are auto-filled based on your event date
• Tied to the budget line items
<table>
<thead>
<tr>
<th>Y/N</th>
<th>Action</th>
<th>Person Responsible</th>
<th>Deadline</th>
<th>Date Complete</th>
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<th>Budget $</th>
<th>Months Prior</th>
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<td>Y</td>
<td>Secure Hotel</td>
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<td>8/5/2019</td>
<td></td>
<td>N</td>
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<tr>
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<td>Send contract to President, EVP, Treasurer, VP</td>
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<td>8/5/2019</td>
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<tr>
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<td></td>
<td>11/3/2019</td>
<td></td>
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<td>Send budget to NAWIC Treasurer</td>
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<td>11/3/2019</td>
<td></td>
<td>N</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>Receive/confirm names of Forum helpers from Director</td>
<td></td>
<td>11/3/2019</td>
<td></td>
<td>N</td>
<td>6</td>
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<td>6</td>
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<td>Y</td>
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<td>1/2/2020</td>
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<td>Y</td>
<td>Create Sponsor/Ads Form</td>
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<td>1/2/2020</td>
<td></td>
<td>N</td>
<td>4</td>
<td></td>
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<td>Work with Director/Regional Technology Chair on web site</td>
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<td>1/2/2020</td>
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<td>Solicit Ads from Chapters</td>
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<td>Send Final Budget to NAWIC Treasurer</td>
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<td>3/2/2020</td>
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<td>Prepare Forum Supplement</td>
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<td>3/2/2020</td>
<td></td>
<td>N</td>
<td>2</td>
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<tr>
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<td>Secure Dignitary for Opening Session</td>
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<td>3/2/2020</td>
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<td>N</td>
<td>2</td>
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<tr>
<td>Y</td>
<td>Send Flyer or Reminders</td>
<td></td>
<td>3/2/2020</td>
<td></td>
<td>N</td>
<td>2</td>
<td></td>
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</tbody>
</table>
Budget:

- Doesn't have to be confusing
- Used as a valuable tool for planning
- You should limit who modifies file
- Make sure you are using hotel contract and F&B for pricing
- Check for separate AV and entertainment pricing
- Remember, F&B over $15,000 must be signed off by NAWIC President
- Use the checksheet to help you remember extra items
- Don't forget to include your speakers in meals, if they are there
- If you don't use a line item, hide the line...don't delete
## Budget Tab:

<table>
<thead>
<tr>
<th>Attendees</th>
<th>Quantity</th>
<th>Unit Rate</th>
<th>Total</th>
<th>Subtotal</th>
<th>Total</th>
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<td>Registrations:</td>
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<td>$0.90</td>
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<td>Non-Member</td>
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<td></td>
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<tr>
<td>miles</td>
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<tr>
<td>Previous Director's Site Visit Travel Mileage - RT:</td>
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<tr>
<td>Director's Pre-Forum Conf Planning Airplane Travel:</td>
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<tr>
<td>Director's Forum Conf Airplane Travel:</td>
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<tr>
<td>Director's Hotel Room:</td>
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<td></td>
</tr>
<tr>
<td>night</td>
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<td></td>
</tr>
<tr>
<td>Director's Hotel Room Applicable Taxes (%Night):</td>
<td>EA</td>
<td></td>
<td></td>
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<tr>
<td>night</td>
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<td></td>
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<tr>
<td>Director's Meals Not Included With The Conference:</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>day</td>
<td></td>
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</tr>
<tr>
<td>Director Airport and/or Hotel Parking:</td>
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| **TOTAL INCOME:** | | | | | $0.90 

**Expenses:**

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<th>Attendees</th>
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<th>Unit Rate</th>
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<th>Subtotal</th>
<th>Total</th>
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<td>Directors Travel Mileage - RT:</td>
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<tr>
<td>Previous Director's Site Visit Travel Mileage - RT:</td>
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<td></td>
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<tr>
<td>miles</td>
<td>$0.535</td>
<td>$0.535</td>
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<tr>
<td>Director's Pre-Forum Conf Planning Airplane Travel:</td>
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<td>Director's Forum Conf Airplane Travel:</td>
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<td></td>
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<td>Director's Hotel Room:</td>
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<tr>
<td>night</td>
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<td></td>
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<tr>
<td>Director's Hotel Room Applicable Taxes (%Night):</td>
<td>EA</td>
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<tr>
<td>night</td>
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<tr>
<td>Director's Meals Not Included With The Conference:</td>
<td>EA</td>
<td></td>
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<tr>
<td>day</td>
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<td></td>
<td></td>
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<tr>
<td>Director Airport and/or Hotel Parking:</td>
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<td></td>
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</table>
| **TOTAL EXPENSE:** | | | | | $0.90 

**Calculated Difference:**

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<th>Attendees</th>
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<th>Unit Rate</th>
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<th>Subtotal</th>
<th>Total</th>
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<td>Actual:</td>
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<td><strong>COMMENTS:</strong></td>
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### Registration Tab:

- Prices auto-fill from budget
- Can be as detailed as you need
- Can be used with registration committee or not
- Auto-fills total numbers (not dollars) back to budget
### Sponsors/Ads Tab:

<table>
<thead>
<tr>
<th>Company</th>
<th>Contact Person</th>
<th>Phone Number</th>
<th>E-Mail Address</th>
<th>$100.00</th>
<th>$250.00</th>
<th>$500.00</th>
<th>$1,000.00</th>
<th>$1,500.00</th>
<th>Pay/Art/Credit Card</th>
<th>Paid (Y/N)</th>
<th>Ad Size (Y/N)</th>
<th>Comments</th>
</tr>
</thead>
</table>

- Prices auto-fill from budget
- Can be as detailed as you need
- Can be used with sponsorship committee or not
- Auto-fills total numbers (not dollars) back to budget
What to look for on a Contract:

- Many coffee/tea breaks are per gallon, not per activity
- Watch for minimums on host/cash bar
- Service charge and tax are calculated on F&B only

*We are currently reserving the following guestroom accommodations for your group: all guest rooms are subject to 15% sales tax.*

<table>
<thead>
<tr>
<th>Rooms</th>
<th>Rate</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>$169.00</td>
</tr>
</tbody>
</table>

**SELF PARKING $24 • VALET $29 (per right)**
50% Discount for group ($12 self-parking & $14.50 valet)

Tax and Service Charge: Taxable 23% service charge will be added to all food and beverage costs. 6% sales tax will also apply. The service charge amount will not be increased.

Host is charged per drink for the open bar period. Choose from our Gold, Silver or Bronze selections. A 21% service charge and 6% sales tax are automatically added to the banquet check.
<table>
<thead>
<tr>
<th>Conference Expenses:</th>
<th>$</th>
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<tbody>
<tr>
<td>Director’s Travel/ Mileage ($0.50/mile)</td>
<td>$</td>
</tr>
<tr>
<td>Director’s Hotel Room</td>
<td>$</td>
</tr>
<tr>
<td>Director’s Parking</td>
<td>$</td>
</tr>
<tr>
<td>National Representative Hotel Room</td>
<td>$</td>
</tr>
<tr>
<td>National Representative Airport Shuttle</td>
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</tr>
<tr>
<td>Keynote Speaker Fee</td>
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</tr>
<tr>
<td>Workshop Speaker Fee</td>
<td>$</td>
</tr>
<tr>
<td>Gifts (Workshops/Director/National Representative/Committee)</td>
<td>$</td>
</tr>
<tr>
<td>First Timer Award</td>
<td>$</td>
</tr>
<tr>
<td>Goodies</td>
<td>$</td>
</tr>
<tr>
<td>Centerpieces/Favors</td>
<td>$</td>
</tr>
<tr>
<td>Printing</td>
<td>$</td>
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<tr>
<td>Registration Materials (ribbons/name tags)</td>
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<tr>
<td>Entertainment</td>
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<td>Misc. (Description: __________________________________________________________________________________)</td>
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<tr>
<td>Total Expenses Paid</td>
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To be completed by the Conference Treasurer:
Approved by: ___________________________ Date: ____________
Paid to: ___________________________ Check #: ____________
Roles/Responsibilities: Registration Committee
Roles/Responsibilities:
Marketing Committee

- National Forum Supplement
- Publicity
- Social Media
Roles / Responsibilities:

Sponsorships Committee
Roles / Responsibilities:

Sponsorships Committee
Roles/Responsibilities:
Logistics/Protocol Committee

• Provide the following:
  o Invocation or inspiration
  o National Anthem
  o Pledge of Allegiance
  o Welcome to the City

• Obtain Speakers (when requested)
• Non-Member speakers
• Entertainment (if applicable and requested)
Roles/Responsibilities:

Committee
Roles/Responsibilities:
Conference Program Committee
EVENT MANAGEMENT

Region Conference Planning
Notes:

Slide 2: Because Regional events (such as Forums, Fall Conferences, Leadership Training, etc.) are held for the benefit of the Region, they are considered a National activity. Therefore, National is responsible for the hotel contract with the current NAWIC National President executing all reviewed hotel contracts, addendums, Banquet Event Orders over $15,000, entertainment contracts and misc. contracts for the event.

Slide 3: Region votes for conference location.
Some Region have chapter bids to host a future conference. Others has a site selection committee that propose locations.
Voting takes place at Region conferences where a quorum has been established.
Top 3 date choices are sent to Director’s Advisor
Discuss with host
Check to make sure there aren’t other big events going on
Not Easter or Mother’s Day weekend
Director’s Advisor sends selected conference dates to Region Director.

Slide 4: Start the hotel selection process.
You may make plans with hotels yourself or use services such as Conference Direct or Helms Briscoe. It’s very important that if you are going to use CD or HB, that you do not do any upfront work. Conference Planners can only be involved if they are the hotels first point of contact.
There is no cost to the Region when utilizing Conference Direct or Helms Briscoe. The commission is paid by the hotels usually a percentage of the room night sold for the event.

Slide 5: Complete at minimum page 1, 2 and 3 need to be completed, reviewed and sent along with the hotel contract to be reviewed by National.
Timeframe for the review process is 5-7 business days for hotel contracts, 2 business days for Addendums. Business days for the National Office is Monday through Thursday. Please plan accordingly.
In the packet there are a list of legal items that National reviews in addition to those items listed on the 1st 3 pages. It is your option whether to complete this checklist or not. Italicized bullets are sample provisions that can be requested on the contract or in the form of an addendum.
Both Conference Direct and Helms Briscoe are aware of the provisions we are looking for and work on having those included in the contract.
NOTE: Things are always changing so there may be additional items than what’s on this list that National looks for
Notes:

Slide 6: Complete at minimum page 1, 2 and 3 need to be completed, reviewed and sent along with the hotel contract to be reviewed by National. Timeframe for the review process is 5-7 business days for hotel contracts, 2 business days for Addendums. Business days for the National Office is Monday through Thursday. Please plan accordingly.

Slide 7: Planning a Region conference is a collaboration of the Region Director and host committee. A positive and cooperative planning approach by all will help to insure a productive, professional and enjoyable conference.
Region Director: Plans and prepare the written agenda and business for the entire conference. The Region Director has final approval of all speakers and final decision of all other matters.
Appoints conference coordinator(s), conference secretary,
All plans for the conference are subject to the approval of the Region Director and should be discussed with her first.
Presides over the conference
National Forum supplement seminars/workshop, special speakers and 35-word description encouraging attendance. Send to National by January 3rd along with information provided by coordinator.
Circulate action minutes within thirty (30) days of Region conference.
Prepare a conference message and provide a photograph for the program.

Slide 8: The Forum coordinator(s) shall appoint committee chairs and members including the steering committee, as necessary to complete tasks identified. Outline the duties of each committee and provide deadlines for each phase of the conference activities.
Keep the Region Director, committee members and/or chapter members informed of plans, activities of all committees and any problem areas. Communication is key!
Send written communication to Region Director in order to expedite and confirm decisions.
Preside over committee meetings. Keep minutes of all committee meeting using steering committee Secretary. Send minutes after each meeting out to Region Director, committee chairs and anyone else that should receive a copy. The Region Director should be invited to attend each meeting via conference call.
Provide Region Director and Region Fund Guardian (if applicable) with periodic updates of the actual vs. budget. If any expenses exceed a budgeted line item, approval of the Region Director is required prior to moving forward with that expenditure.
Prepare a conference message and provide a photograph for the program.
Slide 10: Steering committee is comprised of at least the Forum Coordinator, Steering Committee Secretary, Conference Treasurer and Chapter President (if applicable). This committee works in close junction with the Region Director making all plans for the conference.

Duties include:
Lay the groundwork for the conference by establishing committees.
Outline the duties and timeline of each committee for each phase of the conference activities.

Slide 11: This checklist is a useful tool that can really cut down on confusion and can help communication. No matter how many emails go back and forth, or how many phone calls between the Director and the event coordinator, something will get overlooked. With this check sheet, it takes the guesswork out of the equation.

You simply put a Y or N next to each line item, indicating if your region does this task. Historical information is always helpful.

The steering committee will assign the person/people for each action. The deadline is based on the amount of time prior to the event the action should be accomplished. This is calculated based on the date of the event.

Then there is a column to note if the item relates back to the budget. A No answer is pretty self explanatory. A Y answer bill pull the budget from the actual line item on the budget.

Slide 12: So you can see here each column. These can be filtered to remove the action items your region does not do.

You can filter by the person responsible and print a copy of this list for that person/committee.

You can filter by the deadline dates and whether there are actions not yet completed.

Slide 13: Doing the budget doesn't have to be confusing and is one of the most valuable tools for the success of any event.

The budget worksheet should not be accessible to too many people. Otherwise mistakes can be made, line items can get deleted, and any number of things.

You will want to make sure you are using actual pricing from your hotel contract, banquet menu, and AV contract for your pricing. Not all hotels include AV, so you will want to make sure you have separate pricing for such.

Use the check sheet to crosscheck the budget. If you purchase first timer gifts, but don't have a budget item for that, you will need to add it. You will want to make sure to include any speaker meals if they are in attendance during meal times.

Do yourself a favor and don't delete line items that you don't use. It can mess up calculations and then your numbers won't make any sense. Instead, just hide the lines. That way the calcs aren't affected.
Notes:

Slide 14: The budget tab is broken up into Income and Expenses. You will want to include:
* Registration pricing (you can include an early bird price by adding an additional line between Registrations and Late Registrations)
* Any additional meals that guests would pay for. Some members bring co-workers or spouses that might want to be included in the meals.
* Any sponsorships your region is raising. You will want to list the different levels so you can track them separately.
* Any advertising, such as program or on site.
Seed money is generally no longer used, since most regions now have event funds to take care of this.
Expenses are broken down by sections for:
* The Director and National Rep expenses.
* Meeting Rooms  * Workshops (note to include the quantity of the speaker meals. These will be included in the F&B section)
* Gifts (Don't include any that are donated. Only actual purchases)
* Food Functions (make sure to include the minimum per the contract). Be sure to include the taxes and service charge as outlined in the contract
* Entertainment (are you going to have a DJ for the welcome party? Line dancing? Etc.) If you have a bar, this is not included in the F & B minimum
* A/V Equipment (make sure to check for any hidden fees, include service fees and taxes)

Slide 15: The registration tab should be filled in as payments and/or registrations are received. Notes can be made regarding whether the payment has been sent or not. The $ amounts will auto fill from the budget. You will want to put a number, not a dollar amount, in the registration columns. This will feed back to the budget and be multiplied against the registration fees you set. Your registration coordinator does not have to use this schedule, but you should be communication with each other to make sure your information matches.

Slide 16: The sponsors/Ads tab is much like the registration tab. The dollar amounts feed from the budget and you enter a number for each sponsor/ad received. Again, your sponsorship coordinator does not need to use this tab, but you should be communicating with each other to make sure you match. She should not be including ads or sponsor information in your program if you are not showing you have received payment.
Notes:

Slide 17: You should be looking at your hotel contract for actual pricing. Make sure your room pricing for your Director and National rep are not more than agreed upon in the contract. If you enter the tax and service charge % in the budget lines, the spreadsheet will do the calculations for you. Add in any parking fees for your Director and Rep, if needed.

Food and Beverage, A/V, Bartender, etc may have different service charges, so you will want to verify those on the contract. When budgeting for your breaks, make sure the beverages are being entered in the proper quantities. i.e. gallons, and not each.

Watch and make sure you are meeting any minimum requirements. Budgeting for a cash bar of $500 when the minimum is $1,000 can get you in trouble real quick.

Service charges and tax are calculated separately. In other words, a $10,000 F&B with a 23% SC and 6% tax. The 23% is calculated on the $10,000 and the 6% is calculated on $10,000. Some people make the mistake of multiplying $10,000 by 23% SC and then that total times the 6% tax.

Slide 18: Just like expense reimbursements on the chapter and National level, a form and detailed receipts must be submitted for region conference reimbursement. Remember, a credit card statement is not considered a detailed receipt.

Slide 19: Registration:

Create registration form to be approved by Region Director.

Once approved e-mail out to Region members and the National Board members.

Registration tracking. Can utilize the registration tab on the Region Event Budget template spreadsheet. Pull up form.

At conference have sign-in sheet available. Can provide 2 lists or separate out alphabetically so more than one person can be signing at once.

Registration chair provides registration report at conference. Pull up form.

Compiles registration packets (goody bags) and program book.
Notes:

Slide 20: National Forum supplement provide registration rate, hotel location, room rates, closest airport, tourist attractions, who to contact for more information, seminars/workshop, special speakers and 35-word description encouraging attendance to Region Director and Coordinator by Dec. 15th for review. Final draft sent to National by 1st Monday in January.
Keep your chamber of commerce advised of your plans, they may offer additional services and will certainly be of great assistance in promotional activities.
Convention centers (if there is one in your locale can also offer assistance. That is their business.
Social Media especially LinkedIn can be a great platform to publicize your conference.

Slide 21: Find out from coordinator what has been budgeted for income from sponsorships and ads.
Write a clear mission of what you are doing and if possible provide the theme, workshops, keynotes etc.
Give a clear description of what NAWIC is and does.
Make sure to include geographic information where attendees are located.
It’s ok to directly ask for help to be a sponsor.
Use chapter board letterhead and make sure to include company names because without our companies we would not have had the opportunity to join NAWIC

Slide 22: Include monetary categories that fit your area and what each category includes.
Include other ways to contribute
A welcome party or breakfast sponsor
Welcome (goody) bag items
Have a spot if they are interested in sending an employee to the event as a guest.
State where sponsorship can be sent. If at all possible offer paypal or something similar for a company to be a sponsor. Company’s today can charge it to a credit card a lot easier than sending to corporate for a check to be cut.
Send notices to chapters in region as some may want to sponsor or purchase an ad in the program.
Notes:

Slide 23: Welcome to the city by the mayor or other city official
Speakers when requested by the Region Director through the Forum coordinator
For non-member speakers provide pertinent information to them which should include the length of time they are allotted and approx. time of appearance.
Ask if they have any special requirements like an overhead projector, wireless microphone etc., request bio information and picture for introduction and publicity purposes. In case of non-member speakers, make sure they have a definite understanding as to any honorarium and expenses. Also provide them with a brochure and NAWIC information if they are not familiar with the association. Speakers should be told the time, the particular area in the facility and the name of the person who will meet them. Non-member speakers could be invited to attend breakfast, luncheon and/or banquet. If reservations are required for a non-member speaker, ask the Forum coordinator to make them. Out-of-town non-member speakers should be met on arrival. Notify participants as to other speakers and their subjects. A list should be provided to the Forum coordinator of all items needed in the general session and breakout rooms. Make sure to include the American flag in the list. Arrange for local entertainment if requested, make sure you know what budget you are working with. Any contracts must be reviewed and signed by National.

Slide 24: Arrange room reservations for NAWIC Director, NAWIC representative, other special guests and hospitality suite if applicable. Be sure confirmation is communicated to them.
Try to make room arrangements for the Director and National Rep to be near each other.
Coordinate the following items with the Director/Coordinator
Menus
Timing for breaks
Activities during meals if applicable
Door prizes and/or items for goody bags
National Representative
Arrange p/u and drop-off
Advise:
Is there are any functions for which she is expected to pay like optional events or tours
Dress code for all events including functions that require special attire and/or themed
Thank-you gift for Director and National Rep.
Notes:

Slide 25: This committee works in direct contact with the Region director (copy to Forum coordinator(s)). The Region Director must approve final copy before printing.
Cover design
Set and communicate deadlines for
Director, National Rep., Coordinator welcome messages
Sponsors/Ads
Include:
Agenda
Workshop synopsis/Speaker bios
Hotel map
Conference rules
Obtaining multiple quotes for printing. Some companies will provide printing at no cost if they get an ad in the program.
The proof should be edited before the actual printing is done. The Region Director can be one but it's a good idea to get one or two more members who haven't participated in putting the program together.
The program books should be delivered to the registration committee for registration packets.

Slide 26: We are currently working on putting together a complete packet of tools, roles, responsibilities, templates etc. that will be posted on the National website in the next few months. If you are looking for something specific until then, please send me an e-mail and I will work with you to get what you need.

Meetings can be so much better with the right tools in hand. This is one amazing service with a rich set of features. All yours, for free. Some features are:
Audio Conference Calls with up to 1,000 participants. Highly secured platform
Use phone keypad commands to manage the call such as Mute, Record etc.
Video Call with up to 1,000 participants. View the active speaker in the main window and scroll to see other feeds.
Use to screen share to show your desktop and actually see who’s talking if their camera is active. Annotate using drawing tools, switch presenter and pass control at any time. Recording and playback
Meeting Wall - Create a personal meeting room with a custom URL, profile photo, logo and description. Also upload and share meeting information by uploading documents and access web controls, recordings and more.
To create an account all you need is an e-mail address.