



4.03 -- Annual Meeting and Conference Planning

Responsible Officer or Committee: Conference Planning Chair/Committee

Purpose: The following details the process and tasks to plan the WMAO Annual Conference and/or WMAO Division Specialty Conference/Workshop/Meeting. This process has been documented to provide guidance and ensure consistency in the coordination of the event for WMAO Executive Board Members, Event Partner(s) and Event Planning Committee members. The process includes tasks charted month-by-month to be completed by the conference coordinator, administrative agent for WMAO, and designated parties of the conference planning committee.

The following is a listing of the WMAO Event Planning process tasks:

- Task 1: Event Planning
- Task 2: Facility/Hotel
- Task 3: Event Promotion
- Task 4: Awards
- Task 5: Registration
- Task 6: Sponsors
- Task 7: Exhibitors
- Task 8: Event Set-Up (Day Prior)
- Task 9: Event
- Task 10: Post Event Activities

Process Timeline:

Planning a Water Management Association of Ohio (WMAO) event is a nine-month process with the tenth month allocated to conclude any remaining tasks. This procedure has been charted by months numbered “One” through “Nine”. (This is intended to enable the nine-month planning process to begin/end according to the projected conference date and provide ample time for event preparation.) Month “One” initiates the conference planning process nine months prior to the event. For example, if the event will be held in November, the planning process should commence in March.

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| Month 1 – March | Month 6 – August |
| Month 2 – April | Month 7 – September |
| Month 3 – May | Month 8 – October |
| Month 4 – June | Month 9 – November |
| Month 5 – July | Month 10 –December |

When reviewing the charted process, some “assignments” have been repeated over a course of months. This repetition indicates that the assignment is ongoing and will span across several months.



Process Improvement:

Any participant in the event planning process can identify opportunities for process improvement. Process improvement suggestions are to be provided to the planning committee chair and reviewed for possible process changes on a yearly basis by the WMAO Executive Board.

Training:

Any party charged with coordinating the WMAO Event will file this guidance document for their use. Any interested party is encouraged to become involved in coordinating a WMAO event so that innovative ideas and new perspectives can improve the event and planning process each year.

Major process tasks:

Note: Tasks are outlined so that a designated individual on the event planning committee may perform each. It is useful to review the entire document prior to beginning any planning for the event so that each activity can be considered in context of the entire process and the event.

Task 1. Event Planning

The Event Planning Committee shall consist of WMAO Executive Board members, WMAO general members, and any other interested parties willing to commit to the nine-month event planning process. The WMAO Executive Board is responsible for securing members of the Event Planning Committee. (The Agency/Group leading the Event Planning effort will rotate on an annual basis between ODNR, Ohio EPA and NRCS. The Event Coordinator will be designated by the lead agency/group depending on staff availability.)

Event Planning Committee:

- Identify individual from the Event Planning Committee to act as “Event Coordinator” if not already designated by lead Agency/Group.
- Decide whether a “Call for Abstracts” will be utilized to select any event sessions. If so,
 - Select eligible parties, criteria, submission dates, and notification date for “Call for Abstracts”.
 - Publicize “Call for Abstracts” in various newsletters and on websites.
 - Review and select abstracts, then notify selected parties.
- Select format that best achieves purpose for event. (Would concurrent sessions work well for the event participants? How many sessions will be necessary to achieve the desired outcome for the event? What type of sessions (case studies, panel discussions, workshops, etc...) would make the event most useful? Is the purpose of event educational, networking, organizational, or other? How should sessions be arranged?)
- Brainstorm ideas/speakers for possible event sessions. Reference summary of previous event surveys for additional suggestions.
- Gather additional or background information on proposed sessions/speakers for event, if necessary. (Reference past event agendas to review what topics have already been covered and what topics should be covered.)
- Contact speakers by phone to request participation, explain session topic, and provide details of event.
- Examine proposed costs for event and set registration fees accordingly. (Proposed costs can be estimated from previous event expenses. Most costs are derived from use of the facilities, equipment rental, meals/refreshments, tables for exhibitors/sponsors, supplies, and any giveaways. (Printing costs may also be



considered, if applicable.)) Registration fees should be economical for registrants, but must also be sufficient to cover event costs and administration.

- Establish policies regarding reimbursements and payment of event fees:
 - Reimbursement to individuals purchasing event supplies.
 - Reimbursement of event fees for those who register but do not attend.
 - Requiring payment from those who attend conference but will not submit payment after.
- Generate proposed budget for event and submit to event planning committee for review and approval. Budget should also be submitted to WMAO Executive Board for review and approval.
- Select and order any promotion materials/giveaways.
- Approximately one week prior to the event assemble event registration folders for registrants.
- Set up on day prior to event.

Event Coordinator:

The Event Coordinator's duties must ensure that all event tasks are completed according to the schedule.

- Organization/assignment of the event planning tasks.
- Assign or perform any miscellaneous event coordination duties.
- Schedule committee meetings as needed.
- Prepare agendas for meetings and progress reports to WMAO Executive Board and Event Planning Committee.
- Record minutes of all meetings and distribute to committee members via email or at next scheduled meeting.
- Send meeting reminders during the week of next meeting to event planning committee. (Email is preferred method.)
- Identify and assign event tasks to committee members. (If possible, let committee members choose tasks they would like to perform before making assignments.)
- Draft proposed event agenda – utilizing proposed sessions/speakers and arrange in order that follows selected conference format. (Keep listing of suggestions for event sessions or speakers not utilized for another year's conference.)
- Contact speakers by phone to request participation, explain session topic, and provide details of event.
- Send letters confirming session content and time, general event information, as well as speaker needs forms to speakers.
- Provide tools, materials, or information for committee members to perform event coordination tasks.
- Reserve any necessary equipment (laptop computers, printer, PowerPoint projectors, slide/overhead projectors, flip charts/easels, video cameras, extension cords, etc...) with the appropriate parties.
- Purchase/order folders, nametags, and miscellaneous conference supplies. (Keep receipts to verify purchases when requesting reimbursement.)
- Generate surveys for event attendees to evaluate and comment on event. (Surveys should be as specific as possible so as to gain useful information regarding event format, speakers, content, facilities, etc.)
- Two weeks prior to due date, send email reminder to speakers regarding PowerPoint presentations, speaker needs form, presentation handouts, and personal biographies.
- Require that speakers submit (1) conference PowerPoint presentation via email, CD or floppy disk, (2) speaker needs form, (3) presentation handouts, and (4) personal biography to event coordinator no later than three weeks prior to the event.
- Call speakers who have not submitted event materials to acquire necessary information.
- Designate an individual to manage audiovisual needs and issues during the event.
- Save PowerPoint presentations to CD and make back-up copies for event.



- Organize and revise any materials to be included in the event registration folders prior to submission to printer.
- Submit all event registration folder materials (agenda, session summaries, sponsor information, “Abstracts”, presentation handouts, biographies, registrant roster, and surveys) to printer no later than three weeks prior to event. (Allocate at least 10 business days for printing. More time may be necessary if a private vendor will be conducting printing for the event.)
- Meet with facility/hotel with NGWA liaison to finalize event preparations and needs (set-up and tear-down times, menu, room setup, microphones, screens, approximate number of registrants, table requirements, etc...) approximately two weeks prior to event.
- Generate event schedule including speaker background information to provide to Moderator. This should also be accompanied by instructions to moderate sessions.
- Acquire Moderators for each event to announce sessions, introduce speakers, tell speaker’s background, assist with audio-visual difficulties, and keep schedule on time.
- Retrieve and test all equipment borrowed for the event.
- Count then submit number of each day’s registrants to facility (hotel) for food preparation at end of week prior to event.
- Print any necessary signs (sponsor “Thank you” sign, Exhibits room sponsor/exhibitor location signs, registration table signs).
- Save event presentations on CDs to use in sessions.
- Provide speaking points to speakers and devise list of any appropriate announcements.

Task 2. Facility/Hotel (NGWA Liaison & Event Coordinator)

Event Coordinator should work with NGWA Liaison to arrange facilities for event. The Event Coordinator and NGWA Liaison can then ensure that the appropriate services are ordered for the event while the WMAO President can provide authorization to order the necessary services. The WMAO President will sign all contracts and agreements with facility/hotel.

- NGWA Liaison and Planning Committee should select facility (hotel). Selection may be based on various criteria such as location, cost, service, or accommodations (such as ample space for anticipated number of attendees, sponsor area, table arrangements, as well as cooperation in allocating time for set up/tear down). Acquire information regarding catering/menu options.
- Check facility (hotel) availability for proposed conference dates.
- Select conference date.
- Meet with facility (hotel) to discuss contract. Reserve facility (hotel) for selected dates.
- Review contract (propose changes, if necessary). Submit contract to appropriate parties (WMAO President and Treasurer) for authorization/signatures.
- Submit signed contract to facility (hotel) to secure agreement. (Facility dates reserved upon receipt of signed contract.)
- Select menu for event. Menu may include breakfast, morning/afternoon break refreshments, lunch, and any social engagement refreshments.
- Two weeks prior to event meet with facility to finalize arrangements. (Event Coordinator should obtain “set-up” needs from committee members conducting assigned tasks (i.e. Registration, Sponsors/Exhibitors, etc...)
Registration needs and Specify event needs, such as:
 - set-up and tear-down times
 - display/breakout room tables
 - event room set-up for general and break out sessions



- exhibit room set-up
- registration desk location and set-up (house phone, etc...)
- equipment needs (screens, microphones, podiums)
- storage space required
- menu
- approximate number of registrants

Task 3. Event Promotion

- Draft event brochure for committee review and approval. (Brochure should include agenda, summaries describing session content, WMAO membership information/application form, registration form, event information (details of event, planning committee names, reference to organizations/agencies planning the event), and accommodations information. Brochure could also include information on sponsoring (cost and benefits) or criteria for exhibiting at conference.)
- Enable planning committee to review and propose changes to brochure.
- Finalize brochure.
- Submit finalized brochure to printer.
- Obtain necessary database/mailling list of contacts to send brochure.
- Mail brochure to appropriate parties. (All Water Management Association of Ohio (WMAO) members, government agencies/nonprofit organizations/private sector representatives interested/involved in water management, and any other interested parties).
- Send notice of event to various publications. Follow up as necessary.
- Post event information on WMAO and other interested parties websites. Information should be posted in .pdf downloadable format.

Task 4. Awards (Event Coordinator will work with WMAO Awards Committee Chair)

- Publicize “WMAO Awards” via WMAO newsletter and website.
 - Require submission of award applications by specific date. (Specified deadline for submission of nominations should allow Awards Committee sufficient time to select recipients and order awards.)
 - WMAO Awards Committee (NOT EVENT PLANNING COMMITTEE) will review awards applications and select recipients.
 - Order/pick up awards.
 - Provide WMAO awards information handouts with recipients’ names at event. (Submit this information to Event Coordinator prior to event for printing.)

Note: In past years, awards luncheon has been scheduled during the WMAO business meeting held at the Annual Fall Conference. Presentation of awards should be allotted at least fifteen minutes. WMAO Awards Committee Chair should announce recipients during Awards Presentation. An individual (from Event Planning Committee or other) should be appointed to take photographs of the ceremony.

Task 5. Registration

Registration forms will be included in event brochure and should list all fee information (conference fees, checks payable to WMAO, etc...), provide space for registrant to write all required registration information, as well as address and due date for submission.



Registration Process:

- Collect registration forms and payments for individuals registering for event.
- Depending on payment type selected, email or mail confirmation notice or invoice, and enter all registrant information into database.
- Stamp/write date on registration form upon receipt.
- Photocopy and retain copy of payment received before sending funds to WMAO Treasurer for deposit.
- Log information provided on registration forms into database. *(Since information logged in database is used to generate invoices, confirmations, nametags, attendee rosters, and registration rosters, registration data must be thoroughly checked for accuracy and typographical errors. It may be helpful to have another individual who has not been involved in Registration process to check database for accuracy and typographical errors.)*
- Print nametags for event registrants as well as event roster for registration table.
- Staff event registration table to collect payments at event and update database so financial records are accurate and verifiable.

Database Procedure:

- 1.) Receipt of event registration application (usually via fax or mail).
- 2.) Enter registrant and information into database.
- 3.) Verify registration. Examine registration form to ensure registrant has completed the information appropriately and that payment corresponds to form. If not, utilize telephone number or email address on form to contact registrant to obtain all other necessary information.
 - If registration was received with payment: print confirmation.
 - If registration was received without payment: print invoice.
- 4.) Save information in database.
- 5.) Send confirmation or invoice to registrant.
- 6.) Send event registration fees to WMAO for deposit.

Confirmations & Invoices:

Database has been arranged to correspond with confirmation and invoice forms. After entering registrant information, go to confirmation or invoice form (whichever is appropriate). Registrants will be ordered alphabetically for easy reference. Print off the individual form and send to registrant.

Miscellaneous Tasks:

- Answer inquiries from registrants regarding registration as needed.
- Obtain completed W-9 Forms from WMAO and provide to registrants as needed.

Task 6. Sponsors

Companies or organizations can provide financial support to WMAO and the event through sponsorship.

- Event Planning Committee and NGWA should brainstorm potential sponsors. Draft list of potential sponsors, obtain mailing addresses, and identify individual contacts.
- NGWA will be responsible for contacting and acquiring sponsors.



- Solicit financial support for conference from companies or organizations interested or involved in water management by sending sponsorship letter and agreement via mail. (Letter should contain information regarding display space size and various accommodations information (tables, electricity, etc...)) Follow up with phone calls, if necessary.
- Retain sponsorship agreements for company information.
- Ensure that sponsor registrant information is included in event registration database.
- Acquire logos and display page via electronic format (for inclusion in event registration folder from private sector representatives). Require submissions by date that is approximately three weeks prior to the event so as to allow time for printing.
- Draft and send “thank you” letters to sponsors for their participation in and support of the event.

Task 7. Exhibitors

It is useful for event participants to be aware of organizations and agencies involved in or related to the water management field as well as their services. Inviting organizations and agencies to exhibit at the event provides an opportunity for attendees to interact with representatives of these organizations and acquire information.

After most sponsors have been confirmed, contact organizations and agencies to exhibit at the event. (Exhibitors are invited to participate after sponsors are confirmed so the Event Planning Committee can ensure that (1) budgetary constraints are not exceeded, (2) ample space will be provided to accommodate both sponsors and exhibitors, and (3) the limited space is utilized for invitations extended to the foremost agencies/organizations affiliated with water management first and additional agencies/organizations next.)

- Event Planning Committee and NGWA should brainstorm potential exhibitors. Draft list of potential exhibitors, obtain mailing addresses, and identify individual contacts.
- NGWA will be responsible for contacting and acquiring exhibitors.
- Send event information (brochure, information on attendees, speakers, sponsors, set up/tear down times, and facilities layout) to potential exhibitors via mail/email. Follow up with phone calls, if necessary.
- Confirm exhibitor and contact information.
- Ensure that information from representatives from organizations and agencies exhibiting at the event is provided for inclusion in the registration database.
- Draft and send “thank you” letters to exhibitors for their participation in the event.

Task 8. Event Set Up – Day Prior

- Transfer event registration folders, publications, displays, and other miscellaneous materials to facility (hotel).
- Arrange tables in Exhibits room, assign spaces for confirmed sponsors/exhibitors, set up displays, arrange registration table, store supplies as needed, and ensure facility equipment is set up.
- Event Coordinator and NGWA Liaison should monitor facility (hotel) to assist sponsors/exhibitors with event set up.



Task 9. Event

- AV Coordinator must set up audio-visual equipment and provide any other necessary supplies (easels, flip chart, markers, laser pointers, and extra batteries) in event rooms.
- Coordinate with facility/hotel that all rooms are set up according to agreement (screens, microphones, podiums, food, tables. etc...)
- Ensure that speakers are checked in and prepared for event sessions.

Task 10. Post-Event Activities

After Event Has Concluded:

- Gather and return remaining equipment and materials from event to NGWA

Day After Event:

- AV Coordinator must check equipment to ensure that all components are accounted for and working. Return all equipment to the appropriate parties.
- Ship awards to any recipients not present at the event
- Store remaining event materials

Week After Event:

- Draft and send “thank you” letters to speakers and any other appropriate parties for their participation in/support of the event.
- Review and compile responses from surveys. Generate report of comments and findings for WMAO.
- Submit any receipts required to be filed or for reimbursement to appropriate parties.

Month After Event:

- Review bill from event facility and any business conducted in conjunction with event (i.e. purchases such as awards, promotional items, or miscellaneous fees). Submit bills to WMAO treasurer for payment. Retain all invoices and receipts for submission.
- Ensure that all event attendees have paid event fees.

Draft article summarizing event in *The Water Table* and other appropriate publications.

This policy is adopted in accordance with the Water Management Association of Ohio (WMAO) Code of Regulations by affirmative vote of the WMAO Board of Directors.

WMAO President

Date: _____