

Hosting an ITEA Event

The Benefits of Hosting an ITEA Sponsored Event.

Chapters are encouraged to sponsor educational and networking activities throughout the year for their membership. If a Chapter is considering hosting an ITEA sponsored event the following benefits would apply.

In detail, ITEA Executive Director:

- Will support by producing a production schedule for the event with milestones for the Call for Papers (CFP), brochure, journal ads and marketing materials.
- Will provide a draft estimated budget based on historical data.
- Will provide guidance on committee structure and responsibilities in writing.
- Will provide hotel contract negotiation and will sign all contracts to avoid Chapter liability.
- Will be available to conduct site visit with Event Chair, if necessary.
- In coordination with Event Chair and committee, will design, print and mail CFP and brochure to over 4000 members/mail list persons.
- Will assist in developing a marketing plan, recruit exhibits for the event, create the floor plan, and negotiate contracts with decorators.
- Will assist in developing a marketing plan, recruit sponsors for the event.
- Will provide contracts/pledge forms for Exhibits and Sponsorships and will be responsible for collecting all income and will report out to the Event Chair on status.
- Will produce a webpage about event on the ITEA website and will update information as necessary.
- Will establish registration procedures and forms that will utilize credit cards and on-line registration.
- Will send acknowledgement receipts to all registrants
- Will maintain a database of all registrants and provide status to Event Chair as requested.
- Will oversee and manage the on-site registration desk.
- Will provide all registration materials, including badges, pens, evaluations, marketing materials, etc.
- Will produce a program show guide for the event to include exhibitor profiles, agenda, bios, sponsorships, etc
- Will provide Event Chair feedback from evaluations.
- In coordination with logistics chair, will provide final head count to the facility for banquet.
- Will provide experienced knowledge on all aspects of planning and executing an event.
- Will provide marketing efforts to over 10,000 T&E professionals including email campaigns, hard copy mailings, marketing at ITEA and other T&E events, as well as Advertising in the ITEA Journal.

Event Chair

The Event Chair is the person who accepts the overall responsibility for the event. Initial responsibilities include establishing the event objectives, determining a theme (with the Technical Program Chair) and the recruitment of a chair for each sub-committee. It is important that the target audience and the theme are congruent. The initial planning for most events begins with a small nucleus of people. It is important, however to quickly expand the committee to include representative whose expertise and knowledge will enhance and diversify the development of the program. No single company or organization should dominate the design of the event. Please note: The Annual Symposium and the Technology Review concept and host responsibility is to be decided by the ITEA Board of Directors, with candidates nominated by Chapters and/or ITEA Executive Committee through the Events Committee. The Event Chair will provide status updates to the BOD as requested.

Committee chairs should be selected based on their dependability, accessibility, and everyone's knowledge of the subject matter. Once this has been accomplished and the committees are in place the Chair's primary duties will be to orchestrate the efforts of the various sub-committees, focus attention on responsibilities that cross committee lines and ensure that major decisions are well coordinated with the local chapter and the Board of Directors. The Chairman should maintain a close working relationship with ITEA Headquarters.

- ❑ As appropriate, gains the support of senior management of local organizations, agencies, and companies for the event.
- ❑ In conjunction with senior management and members of the planning committee, determines the objective of the event and establishes an event theme.
- ❑ Establishes committees as required.
- ❑ Recruits chairs for all sub-committees and coordinates their activities.
- ❑ Develops a baseline schedule and maintains a master schedule via inputs from committee chairs.
- ❑ In concert with the Technical Program Chair, monitors the design and development of the program to ensure that it meets the stated objectives of the event.
- ❑ Drafts an agenda for all planning meetings; ensures that deadlines are met.
- ❑ Monitors event expenditures and reallocates budgeted funds as required with ITEA Executive Director.
- ❑ Issues letters of invitation/acceptance to all speakers and panel chairs under ITEA letterhead.
- ❑ Provides periodic status reports to the Events Chair – If the Symposium or Technology Review – must provide input through the Events Chair in a read-ahead package for the Board of Directors
- ❑ Recognizes volunteer efforts.
- ❑ Originates thank you letters as appropriate to speakers, session chairs, and committee volunteers.
- ❑ Conduct regular meeting to coordinate all the above.
- ❑ Has a person dedicated to administrative details, agendas, minutes, etc.
- ❑ Prepare lessons learned for Executive Director

Technical Program Chair

The Technical Program Chair and sub-committee play a major role in establishing the theme for an event and ensuring that the theme is reflected throughout the program. The sub-committee also develops a program format that will support the overall event objectives. The Technical Program Sub-Committee is responsible for all activities associated with developing the technical program, including tutorials and poster papers. However, a chair for each main event should be identified and work in cooperation with the technical chair. It is important when designing the program not to rely solely upon the Call for Papers. A strong program is achieved by selecting session chairs who can leverage their influence to recruit participants and invite papers from selected individuals. The papers received in response to the Call for Papers may be used to augment a session that has been orchestrated by the session chair. Papers that are not presented in plenary session should be presented as Poster Papers. Presentation of a poster paper frequently justifies funding a person to attend the event. The ITEA Education Committee can assist in providing suggested topics for tutorials for the event.

Specific responsibilities include:

Call for Papers

- ❑ Review production schedule provided by Executive Director
- ❑ Establish a sub-committee that will serve as possible the Track/Session Chairs of the program
- ❑ Establish (if any) Best Paper/Presentation Awards
 - Have a point of contact for all actions required (Compilation, evaluations, contacting the recipients, award amounts, etc.)
- ❑ Establish requirements, procedures, and deadlines for technical paper submission.
 - Recommend abstracts of 250–500 words be submitted six months prior to the event.
 - Include requirements for full names, organizations and emails accompany the abstract
 - Deadlines should be in line with production schedule
 - A Call for Papers may not be appropriate for a short-timed workshop; instead, the committee may want to solicit papers from recognized experts in specific subject areas.
 - Provide Topics of Interest/Relevance
- ❑ Ensure that papers are relevant to session theme.
- ❑ Develop Tracking mechanism for all Papers
 - Collect author information (address, telephone, fax, e-mail) and contact authors regarding the disposition of their submissions
 - Maintain up-to-date record of all audio-visual needs for each session. Having an AV chair is critical at this point and forward.
 - Collection of biographies with pictures
- ❑ Inform authors of Paper Presentation Guidelines
- ❑ Inform authors of Authorization Submission Information
- ❑ Inform Poster Paper authors of Guidelines (have chair responsible for this action and follow-on)

Developing the Program

- ❑ As the Call for Papers is distributed, begin developing the program – Please ask if the people are not committed but are considering the invitation, may we have ‘invited’ by their name until a final decision is made?
- ❑ Use the Senior Advisory Board of ITEA and the Board of Directors for any thoughts on potential speakers or back up speakers if necessary.
 - Invite guest speakers
 - Luncheon speakers*
 - Panel Chairs

* Luncheon speakers should be avoided at the Annual Symposium.

- ❑ **Note:** For the Annual Symposium the schedule must allow for the following:
 - ❖ Annual Chapter Leadership Breakfast (Executive Director responsible)
 - ❖ Annual Board of Directors Breakfast – Election of Officers (Executive Director responsible)
 - ❖ Annual International Roundtable discussions (Executive Director responsible)
 - ❖ Luncheon (1 ½) for ITEA Awards Ceremony (Executive Director responsible)
 - ❖ Side bar meetings (Executive Director responsible)
 - ❖ Closing day, a 30 minute “State of Association” address by President (Executive Director and President responsible)
- ❑ For all Workshops, it is customary for the President of ITEA to open the event with a few words.
- ❑ Send letters of invitation to speakers, etc.
- ❑ Confirm speakers, panel chairs, members, etc.
 - Panel Chairs are normally responsible for contacting and developing their panel.
 - Inform them of the time, duration and location
 - Who will be joining them on the panel
 - Asking them to register at the reduced rate
 - Requesting any special audio-visual requirements
 - Track Chairs are normally responsible for reviewing the papers and contacting their authors
 - Inform them of the time, duration and location
 - Who will be joining them on the panel
 - Asking them to register at the reduced rate - please note if more than one author only the principal author will receive the discounted rate
 - Requesting any special audio-visual requirements
 - Tech Chairs are normally responsible for contacting those authors who have been selected to present a poster paper.
 - Inform them that their paper was not selected for the presentation, however that the paper would be an added benefit for the program as a poster paper
 - Put them in touch with the Poster Paper chair at this time (vice versa)
 - Typically, a confirmation should be followed up with a letter of acceptance to key participants including keynote/featured and luncheon speakers. It should include the date and time they are speaking, hotel information, and any other information you feel necessary, (i.e. Speakers breakfast, etc.) The letter should also request a bio, audio-visual requirements, and include a copy of the brochure if available. Also, important: request them to register for administrative purposes only, as their registration fee has been waived.
- ❑ Decide if you want to have a speaker’s breakfast (Annual Symposium always has one) – contact the speakers and inform them of the purpose for the breakfast (final audio-visual issues, meeting other speakers, panel members meeting panel chairs (although they should have already had guidance and communication prior to the event).
- ❑ Have a room set aside for ‘Speaker Ready Room’ for audio visual and speakers to gather.

- ❑ Tutorials
 - Have a chair dedicated to work tutorials
 - ITEA will pay for some course material production – see budget
 - ITEA will not pay the instructors
 - ITEA will not pay travel or related expenses
 - Decide on the number of classes based upon an allotted 4 to 8 hours depending on meeting space availability.
 - Select topics of interest that coincide with your theme or have a Call for Tutorials in the CFPs to obtain new and exciting courses.
 - Decide if you plan on having an award for Best Tutorial – see budget
 - If yes, you will need more volunteers to assess the courses and have new evaluation forms developed to assist in the decision.
 - Work with Education committee in case they have idea of potential classes/instructors
 - Have a short write up on each course (why attend the course, short bio on instructors, and synopsis of course)
 - Once the tutorials have been decided we are one step closer to having on-line registration available
 - Responsibilities on-site
 - Executive Director will provide evaluation forms
 - Audio Visual requirements have been met
 - Meet with instructors – provide guidance sheet on how to take roll call, etc.
 - Give a gift to thank the instructors
- ❑ Poster Papers
 - Have a chair person dedicated to work the poster papers
 - Determine Poster Paper ‘Best paper’ award – and the criteria for judging
 - Provide congratulations letter to authors in timely fashion
 - Provide guidance on posting papers
 - Work with logistics to determine where they will be displayed and how – Easels in hallway, in exhibit area, etc.
 - Schedule times for poster papers to be displayed
 - Set time for authors to meet you prior to setting up
 - Request authors to register at discounted rate

Notes from previous Lessons Learned on Technical Committee

- ❖ Technical Program Chair should take advantage of the ITEA Senior Advisory Board for key speakers or a ‘fall-back’ plan for canceled speakers and panel members.
- ❖ It is essential that Track Chairs be tapped down early in the process.
- ❖ The technical committee should solicit papers in advance; recruited papers.
- ❖ The Tech Chair should keep in touch with members often – having meetings of just technical committee was very helpful
- ❖ Technical Committee needs administrative support.
- ❖ Keep in mind, it was more difficult getting senior and featured speakers than anticipated
- ❖ Introduce speakers in less formal manner than reading Bios.
- ❖ Might consider having each panel with a template for the first page to include names of speakers, titles, with pictures if possible and in the order that they will be speaking.
- ❖ Q&A on designated blackberry might be an option

Notes from previous Lessons Learned on Program options

- ❖ Have a Range Commanders Perspective Panel
- ❖ Have panel on ACQ
- ❖ Expand non-DOD/Aerospace.
- ❖ International integrated into the mix, not a panel of foreigners
- ❖ Engineering level – Lessons Learned from the field.
- ❖ Panel of Technology Speakers
- ❖ We have been focused on the big T and having little e, perhaps we can increase the evaluator's perspective.
- ❖ Need big draw, unusual – doesn't have to be T&E but something new – iRobot, NASCAR, etc.
- ❖ Perhaps begin next year's program with a wrap up from previous year.

Developing the Brochure

- Review production schedule provided by Executive Director
- Use Word format in developing the shell of the program (Provided by Executive Director)
- Final confirmation of speakers
 - Titles and names spelled correctly
 - Confirm time and duration of speech
 - Confirm audio visual requirements
 - Have a point of contact (w/cell phone) for them to call upon arrival in case of challenges.
 - Ask for bio and/or picture to use in program guide (if desired)
 - Invite to speakers' breakfast – with explanation of purpose
- Work with session/track and panel chairpersons to finalize individual sessions
 - Names, titles, organizations spelled correctly

Prior to and During the Event – in Coordination with Event Chair

- Executive Director to assist in drafting a script for the program – who – when – where – etc.
- Coordinate meeting on the Sunday prior to the event and perhaps after stuffing materials to go over any last-minute details.
- Always have someone available to greet guest speakers and answer any questions
- Speakers Breakfast
 - Provide a hearty breakfast.
 - Have audio visual technician available
 - Provide introductory comments to welcome and thank the speakers
 - Have reserved tables for seating to allow for Track chairs/Panel chairs to have all their presenters at one table for discussions.
- Tracks
 - Make sure you have volunteers ready to support each track with audio visual needs, gift giving, track lead introductions.
 - Make sure each track lead has podium with microphone

After the Event

- Write thank you letters to speakers in coordination with the Event Chair.
- Provide Executive Director with the proceedings in accordance with guidelines.
- Send out notification of proceedings to attendees (Executive Director)

Finance Chair

Every year, ITEA develops an annual operating budget to run the association. Over forty percent of the budgeted income comes from various ITEA events. For all events scheduled during a fiscal year the Events Committee in cooperation with the Event Chairs project a net income for each event. The projected workshop/conference income is based upon historical data from past performance and a comparison with similar size/type events for first time programs. ITEA will provide you an estimated, *draft* budget with the projected income as your goal. It important to remember that the draft budget is only an estimate of projected revenue and expenditures and will need to be adjusted to reflect the specific circumstances of your event. It is your responsibility to base your financial figures on known entities in some cases, and where necessary, your best estimates. Once you have completed your budget you must provide a copy to ITEA headquarters.

One of the most important functions of the chairperson of the Finance Committee is to monitor and compare income and expense with the approved budget. Expenditures should be tracked as they are incurred, and the Event Chair and other committee chairpersons should be kept well informed regarding the financial status of the event. Good budgeting and good financial management establish the operating framework for the event. The first step to successful budgeting is to determine the financial philosophy for the meeting. Should the meeting produce a net income, or should the event simply try and break even because the subject is of key importance to the T&E community. Since event income supports ITEA's scholarship programs, defrays the cost of publishing *The ITEA Journal and* provides the operating funds to administer the Association, most events should be organized to produce a net income. One of the most important functions of the Finance Chair is to monitor and compare the income and expenditures with the approved budget. To maintain an accurate financial picture, it is important to track expenditures as they are incurred and to keep the Committee chairs and the Event Chair informed of the finances. The Finance Committee Chair will work closely with ITEA Headquarters. ITEA Headquarters will be responsible for tracking actual expenses and income, based on income received and expenses paid at ITEA Headquarters. Registration and exhibit income will be deposited by ITEA Headquarters. All major expenses will be paid by ITEA Headquarters. The Finance Chair is responsible for forwarding all income and invoices to ITEA Headquarters for processing. Seed money in increments of \$1,000 will be provided to the Finance Chair for incidental expenses. *The Internal Revenue has determined that ITEA, as a not-for-profit organization, qualifies under Code of Virginia 58.1-609.11 to purchase tangible personal property without paying Virginia Sales Tax. The exemption is not applicable to the purchase of taxable services, such as food or lodging.*

Specific responsibilities include:

- In preparing the budget follow the line items as closely as possible. This will allow ITEA Headquarters to accurately compare the budget with the budgets of other events and to provide an historical record to assist future planners.
- Submit an event budget to ITEA Headquarters through the Events Committee for the Ways and Means Committee review.
- Establishes and maintains a local checking account for payment of small items and incidentals related to the workshop.
- Establishes and maintains all local financial records and accounts.
- Forwards any funds received to ITEA Headquarters for deposit.
- Monitors the expenditures and financial obligations incurred by each committee to ensure compliance with the approved budget.
- Presents an event financial report at each planning meeting.
- Keeps the Committee Chairs and the Workshop Chair abreast of each committee's actual expenditures and obligations.
- Notifies the Workshop Chair when the event expenditures are 10 percent in excess of the approved budget.
- Advises the Workshop Chair regarding the reallocation of budgeted funds.
- Ensures that all invoices are verified before forwarding them to ITEA Headquarters for payment.

- ❑ Sends final event financial statement to ITEA Headquarters for inclusion in the ITEA Federal tax return required for not-for-profit organizations.
- ❑ Closes out accounts. Sends proceeds to ITEA Headquarters.
- ❑ Sends all financial documentation (receipts, bank statements, cancelled checks, invoices, etc.) to ITEA Headquarters for permanent filing. This is required documentation for ITEA tax returns.

Note: Contact all vendors to get price quotes as soon as dates and location have been identified to start the budget process.

Registration

Stuffing of the Registration Material: ITEA to produce. If your local chapter has a flyer or upcoming event they would like to market, have the material available. Also, you may provide information of local interest that may be included in the registration packet including maps, restaurants, and recreational events. These items are usually available through the Chamber of Commerce.

***Badge and Registration Preparation:** Also required on the same day is a minimum of four volunteers who will be available to work at the registration desk Monday and Tuesday to handle on-site registrations. The ITEA office will provide a laptop computer and portable printer dedicated for the use of the registration volunteers. It is important that the volunteers be available at a minimum during the first two full days that the registration desk is open. Contact at ITEA with names.

- ITEA Will
 - Establish registration procedures and forms that will utilize credit cards and on-line registration
 - Receive and send acknowledgement letters to all workshop registrants
 - Maintain a database of all registrants
 - Oversee and manage the workshop on site registration desk
 - Provide registration personnel for 'on-site' registrants
 - Provide folder and all stuffing materials
 - Provide nametags and holders for all registrants
 - Provide a program show guide that will include:
 - List of all attendees
 - Agenda
 - Sponsor information
 - Bios (if necessary)
 - Exhibitor Floor plan
 - Exhibitor company descriptions
 - Provide ITEA pens for use in the registration package
 - Provide an evaluation form electronically
 - The Evaluations will be analyzed, and data will be forward to the Event Chair, Technical Program Chair, and the Events Committee Chair

Exhibits

- ❑ Select a volunteer from your committee to work with Executive Director
- ❑ The site survey to be completed by Executive Director with committee volunteer
- ❑ The floor plan to be developed by Executive Director
- ❑ The decorator to be chosen by Executive Director
- ❑ Decide on internet connection availability (work with Event Chair and Finance Chair)
- ❑ Executive Director and committee volunteer to develop marketing strategy
- ❑ ITEA Corporate Members receive a discount on exhibit fees
 - Applications will be developed by Executive Director and available on the web
 - No table tops will be available at the Annual Symposium
 - Host activity receives one complimentary exhibit space (this does not include registration fee)
 - Check Executive Director for pricing
 - A 10x Booth space receives 2 complimentary registrations
 - A table top space receives 1 complimentary registration
 - Exhibit price includes:
 - Lunch
 - Standard electrical outlet
 - 8' skirted table
 - 2 chairs
 - 1 trash can

Notes from previous Lessons Learned:

- ❖ Have some other reason for people to go to the exhibit hall
- ❖ Have security in the exhibit hall during lunch breaks and for someone to check badges as they enter the hall.
- ❖ Perhaps the Event Chair can say a few words to the Exhibitors in the Hall at the beginning of the program. Thanking them, telling them about the VIPs that will be waiting through the hall that week.
- ❖ Have a place where exhibitors can meet with clients.
- ❖ Have a place where exhibitors can have their own refreshments
- ❖ Have internet available – either free or include a price list

Sponsorship

- ❑ Select a volunteer from your committee to work with Executive Director
- ❑ Develop marketing strategy to obtain sponsors
- ❑ Develop additional benefits if necessary
- ❑ Levels of Sponsorship and Benefits
- ❑ Sponsorship pledge form available on website
 - Direct potential sponsors to site or to Executive Director
- ❑ Once sponsorship has been determined collect company logo and forward to Executive Director ECDM
- ❑ Executive Director to obtain price quotes from sign companies
- ❑ Sponsorship for workshops and conferences are available (Platinum \$2500, Gold \$1000, Silver \$500, Bronze \$250)
- ❑ Sponsorship for Annual Symposium (Platinum 10,000, Gold \$5000, Silver \$2500, Bronze \$1000)

Logistics

This committee will be challenged to do much of the preparation in working with Executive Director on details while supporting the event on site with several volunteers with specific duties. The volunteers associated with Logistics should have their own meetings and as the date approaches a dry run of the 'script' to make sure the program runs smoothly – who is doing what.

- Audio Visual
 - Select vendor, pricing and requirements
 - Provide a team to support technical committee
 - Gather materials, download presentations, available on-site for changes/additions, and prepare proceedings according to guidelines
 - Be available on site for assistance
- Signage
 - Working with Exhibits/Sponsorship committee
 - Directional signage for hotel/convention center
- Tour
 - Site selection – professional events only
 - Description write up
 - Costs associated with tour – lunches, transportation, etc.
 - Security issues
 - Volunteer on-site for all coordination efforts
- Hotel
 - Executive Director responsibilities
 - Volunteer to provide local information on hotel name/location, point of contact, phone, .email for consideration
 - ITEA would rather be the 'big fish' and not lost at sea in a large facility
 - If necessary, Executive Director will send out an RFP to determine options for space
 - Executive Director will conduct site visit, and the Event Chair, Event Committee, and others are welcome to participate
 - Executive Director will negotiate and sign all contracts
 - Executive Director will provide room night updates to committee
 - Executive Director will provide names of VIPs (with input from Event Chair) and Complimentary rooms to hotel
 - Volunteer responsibilities (Executive Director available for any consultation)
 - Decide on meeting space configuration
 - Available during the entire event for any hotel issues
 - Work with catering on food and beverage (Final Guaranteed #s provided by Executive Director)
 - Have walky-talkies available in the command center
 - Have internet connectivity in the command center
 - A way to communicate when the program progresses into the sessions (bull horn, microphone, chimes, lights, etc.) and have someone dedicated to making sure it is done

- Gifts
 - Committee to decide on costs and gift
 - Purchase gifts (submit invoice to Executive Director or have Executive Director purchase w/AMEX)
 - Script words for giving gifts
 - Traditionally, gifts are given to the following:
 - Speakers
 - Panel Chairs
 - Panel Members
 - Track/Session Chairs
 - Instructors
 - Evaluation Form Raffle (to encourage participation)
 - As a thought, many of the speakers have been ITEA speakers/participants in the past and may already have a few 'ITEA' mementos, so you may want to consider the following options (not limited to):
 - Donation to a charity on behalf of the participants
 - Themed gift – Coffee table book, landscape picture, item of interest from location.
 - Keep in mind most will travel on a flight, keep in mind when deciding
- Golf
 - Site selection – Contract signed by Executive Director
 - Time – many Exhibitors would like to participate so allow for time for them to set up their booth if possible
 - Pricing (includes green fees, cart, boxed lunch, drink ticket, etc.)
 - Solicit giveaways from companies sponsoring
 - Sponsorship of holes (\$100 each) is typical
 - Monies go directly to local chapter scholarship fund
- Advertisement
 - Develop marketing strategy with Executive Director
 - Local papers
 - ITEA Journal
 - ITEA email campaigns
 - Other options
 - Other mail lists