

**CONFERENCE GUIDANCE
(July 2024)**

TEDA Conference Chair Time Line

Year-round responsibilities:

- Monitor and respond to conference email daily, more when closer to the conference
- Send all flyers, announcements, schedule etc. to the past president for editing and approval prior to use and distribution
- Prepare conference reports for board meetings

At conference the year prior and for upcoming (if known):

- Prepare and distribute a save the date announcing conference location and date

10-12 months prior to conference:

- Based on previous year's budget, prepare a proposed budget for board approval and send appropriate officer (treasurer?)
- Confirm conference center and hotel contracts with each
- Determine theme and use for flyer graphics
- Prepare and send to post initial flyer on line and send for distribution through email and *DiaLog*
- Prepare registration form
- Have conference tab from previous year cleared
- Have committee decide how it will do the reception, if they will do a reception and what the needs for that are
 - When and where
 - Food or no food
 - Activity or not (Back to basics: Diag 101, poster session, round table...), are presenters needed, who and what will that look like

6-8 months prior to conference:

- Send registration form for distribution and for posting
- Book all speakers
- Once speakers are confirmed, prepare new flyer with all speakers on it
- At about 6 months prior depending on when the conference is and when *DiaLog* will be published, send new flyer and registration form for distribution

3-6 months prior to conference:

- Complete all speaker contracts (best done as soon as speakers confirm)
- Generate a list of speaker needs based on contract information
 - Hotel rooms
 - AV
 - Food
 - Handouts
 - Anything else they mention
- Prepare hotel rooming list of board members and speakers, send to hotel when complete (about 3 months out)
- Research books/gifts for attendees
- Check with TEDA Chapters to see if interested

- Prepare matrix (written schedule) and send to website for posting
- Determine what the menu will be for the luncheon and what the conference will do for lunch the second day (if needed)
- Begin monitoring hotel occupancy and determine if overflow room are needed, continue to monitor
- Confirm that a new W-9 has been completed by treasurer and is available through the TEDA administrative assistant for districts who request it

3-4 weeks prior to conference:

- Collect handouts from speakers who said they would send electronically and send for posting under password protected tab
- Finalize menu with conference center
- Send AV needs to conference center, list by room not speaker, include a matrix for conference center use
- Confirm vendor set up with vendor chair
- Confirm what chapters will donate to be included with gift bags
- Confirm whether or not door prizes will be used and how
- Continue to monitor registration numbers and hotel occupancy for any needs
- Update budget with expenses to date and income

1-2weeks prior to conference:

- Confirm the number of registered attendees
- Confirm number of TEDA members registered
- Generate general assembly/luncheon numbers and use for conference center meal confirmation
 - All registered TEDA members
 - Board
 - Speakers who chose to have lunch on their contracts
- Follow-up with TEDA Registration coordinator regarding registration numbers and other needed info.
- Prepare conference materials
 - Schedule meeting for Board members to assist with set-up and discuss registration plan.

Day prior to conference:

- You and the committee should be on site the day prior to the conference pretty early in the morning to prepare (if travel is involved you may want to arrive the night prior)
 - Check to be sure the materials you need to distribute at registration are ready
 - Prepare list of who will do what at registration, usually done at board meeting
 - Prepare the registration and TEDA tables for the registration/check-in
 - Sign in sheets
 - Place for administrative assistant to set up her laptop and work on site registration
 - TEDA table: TEDA tablecloth, Membership forms, TEDA brochure, *DiaLogs*, candy and/or decorations, save the date flyer or postcard for next year

CONFERENCE GUIDANCE (July 2024)

- 1. Organizational Considerations**
- 2. Events/Meetings to be Included in Conference**
- 3. Hotel/Conference Center Considerations**

TEDA Conference

1. Organizational Considerations

Committee Members:

Treasurer: TEDA Treasurer

Sub-Committees:

Hotel/Conference Center: Conference Chair

- Works closely with the convention center and/or hotel and signs the contract
- Maintains communication with convention center
- Maintains communication with hotel
- During the conference, will be the person to communicate needs with the hotel/conference center as they arise

Speakers: Chair or Appointed by Chair

- Distribute/collect “Call for Proposal” documentation to speakers
- Obtains commitments in writing from speakers
- Gathers speaker biographies, topics and other information for print/posting
- Communicates with speakers in reference to their needs (hotel, food, travel, audiovisual for conference, etc.) (See speaker agreement.)
- Obtain handouts from speakers

Registration: Administrative Assistant

- Secures list of registered attendees with TEDA Members indicated
- Sets up the registration table with conference chair and has all materials needed for the registration table ready
- Secures assistant to support coordination and organization of registration information

Technology: Appointed by Chair

- Maintains contact with technology vendor (i.e., Whova)
- Updates platform with changes and notifications as needed.

Vendors: Appointed by Chair

- Solicits vendors for conference
- Obtains signed agreements from vendors
- Collects fees from vendors
- Provides vendor information to conference chair
- Checks first day of conference to be sure tables are set up as desired

Décor / Door Prizes: Appointed by Chair

- Creates “logo” based on conference theme
- Responsible for the décor and general attractiveness of the conference
- Is responsible for or works with a fellow sub-committee member to obtain door prizes, if used

TEDA Conference

2. Events / Meetings to Be Included in Conference

Events/Meetings planned and paid for by the Committee

The conference itself:

- Rooms for keynote and breakout sessions
- Reception organization (i.e., light finger foods, entertainment, etc.)
- For the annual General Session business meeting held at the conference, the conference chair is responsible for arranging for the room and meal.

Events/Meetings to be coordinated with TEDA board who is financially responsible

Day before the conference:

- TEDA executive board meeting (the conference chair is responsible for arranging for the room and accommodations requested by the president in a convenient location)

TEDA Conference

3. Hotel/Conference Center Considerations

Negotiating the hotel/conference center is one of the more difficult aspects of the conference and is where the most problems will occur if not handled correctly.

Conference Date:

The first decision is where and when and should be decided together (committee and/or board) as the preferred “when” may not be available at the preferred “where” and vice versa. Multiple calls to venues to find options should begin years in advance of the conference. This will take time and patience, expect to spend some time negotiating. You will need to be aware of what else is occurring at that same time of year, with particular attention to STAAR/ current state testing dates, religious holidays, school calendars/breaks (including school districts and universities), PEIMS reporting dates and the start and end of the year. When determining the location, consider factors such as easy access to airports/transportation, centrality to large pockets of TEDA members, and/or a destination that is desirable to diagnosticians (South Padre, Galveston, San Antonio have been successful). You should have a board approved four to eight-week block of time to work with.

Hotel/Conference Center Needs for Presentations/Sessions

- The committee needs to first determine the number of attendees you realistically expect
- Determine the schedule you would like to follow so you know the number of rooms you will need
 - Keynote? If so when in the schedule
 - Breakout sessions? Is so how many and when? Will they repeat?
 - Other events/meetings
 - Will there be a reception /poster session/round table the first night and where will it be held?
- Look at room capacity for each of the sessions you will hold
 - Breakouts of 150 or 250 each? Room capacity smaller than 150 is not recommended
 - Keynote of 500 -700
 - We usually use classroom style seating (rows of chairs and tables) for the sessions/presentations
- Plan meals for the full number of those attending the meal (general luncheon/meeting is members only). Check with registration for number registered to attend the luncheon.
 - Consider Food & Beverage cost requirements. Most conference centers have a required amount that must be spent to waive room rental fees. Be cautious and make sure you have the most current pricing for food items.
 - Check the most recent conference numbers available to determine food amounts
 - Remember to keep the meal something neutral so most people will eat it.
 - Buffets have been very well received recently because it is easier to offer

more options and meet more dietary preferences. Consider buffet menu items that include some options for vegetarians and individuals with nut allergies

Hotel Considerations for Rooms (rooms for those spending the night)

- Hotel rooms that are convenient to location of sessions (either the same location, walking distance, or shuttle is provided if first two are not possible)
- Offers state rate – or rate very close
- Has enough rooms available that will be blocked for conference attendees
 - DO NO OVERCOMMIT** to rooms blocked for conference if you will be responsible for them (pay whether or not the rooms are booked/filled)
 - Discuss adding later if necessary
 - Negotiate attrition rate (how many rooms you committed to, but if unbooked, you do not have to pay full price for them) 10% - 20% is usually reasonable.
- Negotiate the cutoff date for people to book with TEDA at TEDA rates
- Be sure that TEDA is not responsible for attendees who book and do not pay.
Registration for attendees should be “self-pay” terms and not part of the “master” room account.

Insurance

- TEDA carries liability insurance for all events including the conference – you may obtain a copy from the president or other board members
 - Insurance beyond what we have should not be needed. Check these requirements before signing the contract (s). Your committee may be financially responsible for additional insurance if it is required.
 - Insurance should not be needed for hotels that are sleeping rooms only.

Parking

- Parking is a must for both conference centers and the hotels
 - Preference is always free parking for attendees, but may not be available. Be sure to note how parking will be handled in the registration form or flyers.

Shuttles

- Shuttles to and from convention centers that are not located within the hotel or within walking distance will be needed for attendees who do not have cars.
 - Be sure you agree with what the hotel considers walking distance, keeping in mind your attendees
 - Consider options if shuttles are not available – some form of transportation must be available.
- Shuttles to and from hotels are not as common as in the past, especially in areas such as Galveston and San Antonio. In recent years, transportation to and from airports has been left up to the attendees.

Contracts

- Get copies of your contracts before signing them to allow for more than one committee chair or member to read and review before you sign it along with the TEDA president. (If there is a personal emergency, there is a huge amount of financial liability if all of the information and contracts are in the name and/or possession of a single individual who may be unavailable due to unforeseeable circumstances beyond her control.)
- KEEP A COPY OF YOUR CONTRACT** once it has been signed by all parties. You may need it if the hotel or conference center tries to change the terms, dates, or rates.
- Give the TEDA president a copy of the fully executed contract.

Tax Exempt Status

- TEDA is not tax exempt at this time.