



Region Leadership Conference Toolkit



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Purpose of the Toolkit

This toolkit includes a collection of materials, instructions, guidelines and other resources designed to serve as a framework for planning and managing a successful Region Leadership Conference.

Each of ACTE’s five regions has its own process for selecting the state, city and facility for its conferences. For example, Region V sends out a request for proposal (RFP) and chooses the state/city/facility that best fits their needs, and Region II determines their state/city/facility based on an alphabetical state rotation. Regardless of how the region determines the venue, there are standard processes that should take place to ensure that the proper state, city and facility are confirmed.

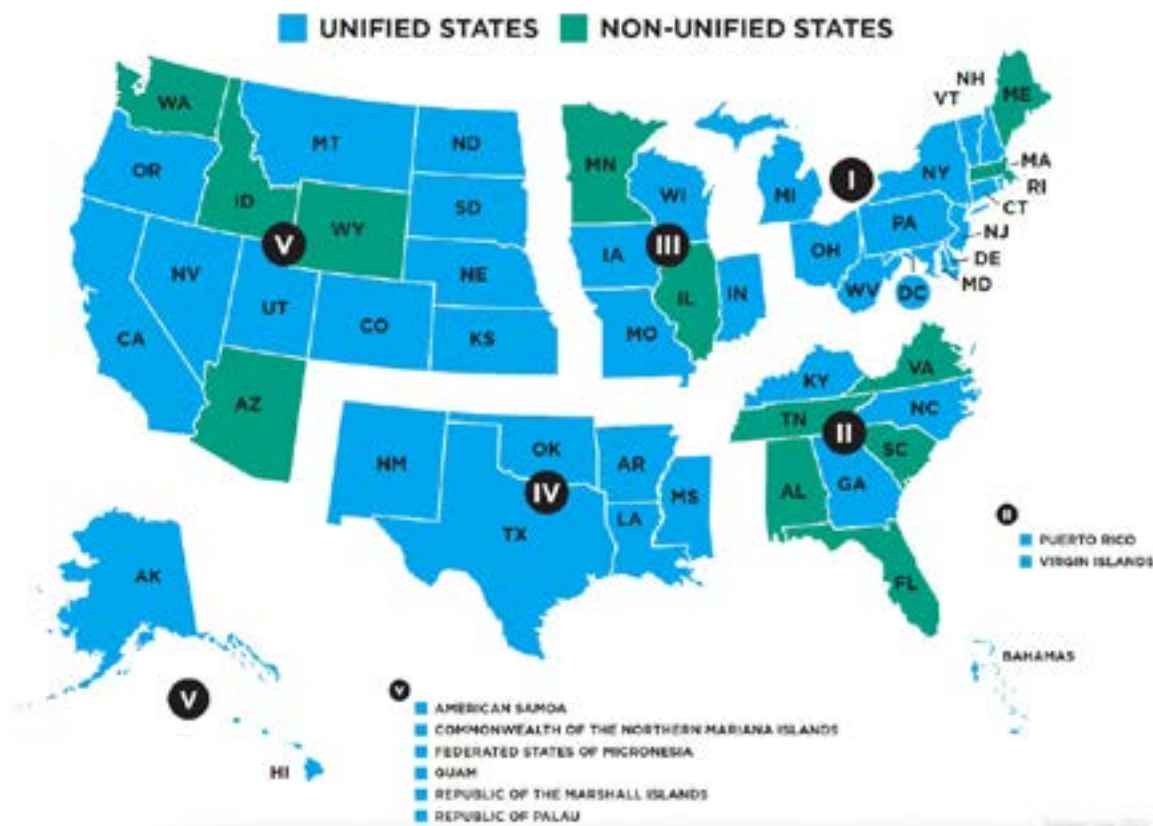
- Region I: Hosts every third year in New York City; otherwise, alphabetical state rotation
- Region II: Alphabetical state rotation
- Region III: Alphabetical state rotation
- Region IV: Alphabetical state rotation
- Region V: Sends RFPs to states in their region

**NOTE: ACTE is working with regional representatives on additional ideas for strengthening the programming at region conferences and will be updating this guide as those ideas are developed and finalized!*

About the Regions

ACTE regions were established in 1975 as a framework for supporting the state associations and providing opportunities for members to get involved at the state and national levels. Region vice presidents assume the responsibility for coordination, leadership and communication with the states. Each year, the regions host their own conferences to provide members with professional development, leadership development and networking opportunities closer to home. The ACTE board of directors has established policy regarding regional conferences:

- That every region shall have a regional conference
- That regional conferences shall be designed to promote leadership development, serve the broad membership of ACTE within the region and support the ACTE Strategic Plan
- That there be a program planning book developed for each region and passed along from host committee to host committee
- That ACTE, through its leadership and staff, shall provide support in the design and delivery of sessions on leadership development, legislation and grassroots advocacy
- That there be a mentorship program established for new region vice presidents



As of June 2023, the board policy is as follows:

VIII.22. Region Conference Policy Clarification (11/16), (7/21)

1. Each individual ACTE region will provide \$1,000 in seed money to the host state for a region conference in that region to help offset expenses required before any revenue has been collected. This seed money will be returned to the ACTE region after the conclusion of the conference as the intent is for the seed money to be a loan and not a gift.
2. States within the region are not required to donate to the region conference host state.
3. The ACTE region and the host state will evenly split net revenue, with or without an MOU signed by the host state and in no regard to the unification status of the host state, after expenses have been reconciled and paid. The \$1,000 seed money will be returned to the ACTE region from gross revenue and not included in the calculation of net. If a third-party organization is involved in a host function, net revenue may be split among the three parties.
4. A complete financial accounting must be provided, with payment to the ACTE region within 60 days of the conclusion of the conference.
5. Host states have the option of signing an MOU with ACTE to assist with the region conference preparations. In the event that the host state waives this option, the host state recognizes that they take on complete and total liability for any contracts, agreements or losses they may incur as a result of the region conference. The host state is responsible for repayment of the seed money, regardless of profitability.
6. No liabilities arising from Region Conferences will be paid from Region/ ACTE accounts unless the liabilities were incurred by ACTE under the terms of the MOU or signed contract.

Roles & Responsibilities

Responsibilities of the Region Vice President

- Execute the memorandum of understanding (MOU).
- Oversee and/or perform all tasks of the planning committee based on an agreed-upon conference planning timeline. [Sample Conference Planning Timeline](#)
- Communicate with the ACTE headquarters office regarding the date and location of the regional conference as early as possible.
- Develop an agenda (see Agenda section) that includes ACTE board policies, the purpose of the conference, guidelines on planning, and information on available resources.
- Schedule sessions on leadership, legislative updates and grassroots advocacy.
 - » Please [click here](#) to see the complete list of program session options.
- Schedule an ACTE update to the program.
- Provide ACTE with conference program and registration details for posting on the ACTE Regional Conference website. Dates for the next conference should be posted immediately after the conclusion of the previous conference. Updates should be provided early and often.
- Ensure that all promotional materials, conference web pages and electronic program guides are accurate and up to date.
- Issue an invitation to the ACTE president and executive director to attend the conference; provide for complimentary registration fees and, if available, lodging.

Responsibilities of the Planning Committee

- Help organize a Host State Committee. [Sample Invitation](#)
- Assign subcommittee responsibilities. [Sample list](#)
- Prepare a conference agenda. [Sample Agenda](#)
- Responsibilities of the Host State
- Help create and support the planning committee.
- Secure honor guard and pledge of allegiance presenters for the opening of the conference. Participate in conference planning calls.
- Assist in locating and arranging local tours.
- Assist in marketing the conference to their network.
- Depending on the MOU, the host state may be responsible for contracting and fulfilling terms of agreements with conference facilities. State hosts who execute agreements without ACTE review and approval hold full responsibility for fulfillment of financial terms with vendors.

Responsibilities of ACTE

- Include the region conference dates on ACTE's Regional Conference website, in Techniques magazine and in the CareerTech Update SmartBrief.
- Depending on the MOU, provide registration services and access to reports.
- Depending on the MOU, assist with identification of conference facility and vendors and/or executing agreements.
- Serve as session presenters and facilitators as requested.
- Update the ACTE Regional Conference website upon receipt of conference information from the vice president.
- Provide ACTE membership materials for distribution at the conference.
- Provide financial reimbursement for travel and hotel costs (if needed) for the president and executive director.
- Provide program guide and/or electronic app development as requested.

FIND TOOLKIT RESOURCES AT [ACTEONLINE.ORG/REGIONS](https://acteonline.org/regions)



Your Dream Team, aka

the Planning Committee

The work of the regional conference planning committee is ultimately the responsibility of the region vice president. Planning committees are responsible for organizing and managing the regional conference. These committees typically consist of individuals from various backgrounds and organizations who work together to plan every aspect of the event, from the venue selection and logistics to the agenda, speakers, marketing and sponsorship.

The members of a conference planning committee may include members of your policy committee, volunteers, representatives from the host state, etc. The committee's primary responsibility is to ensure that the conference meets its objectives and provides a positive experience for attendees. This involves coordinating all aspects of the event, from the initial planning stages to the post-event evaluation, to ensure that everything runs smoothly and within budget. Effective communication and collaboration are key to the success of the conference planning committee, as well as careful attention to detail and the ability to adapt to unforeseen circumstances.

It is very important that you enlist several people to join the conference planning committee. Due to the many aspects of conference planning, it is recommended that the planning committee be divided into subcommittees to tackle specific conference areas. Below are some suggested subcommittees:

- Exhibitors/Sponsors Marketing
- Social Media Program Content Tours
- Awards Keynotes

[Click here to see a sample list of responsibilities of each committee](#)

The generally accepted practice is for the planning committee to convene one year before the date of the conference. It is recommended that the committee meet once a month for the first four months, then once every two weeks for the next six months. For the remaining two months, the committee should meet weekly to firm up final details and preparations. It is the responsibility of the region vice president to ensure that the planning committee is adhering to deadlines and that the process proceeds in an effective manner.

Memorandums of Understanding

A memorandum of understanding (MOU) is a document that outlines the agreement or understanding between the region and the host state and is a vital component of a successful partnership. It is a binding document that lays out the roles and responsibilities of each party. Its purpose is to establish a framework for cooperation, collaboration and coordination between the parties.

MOUs should be signed before commencement of any work pertaining to the conference. To assist in making the MOU process as easy as possible, ACTE enlisted legal counsel to create a template: **MOU Template**. It is highly recommended that all regions use this template as a starting point.



Request for Proposals /

Site Selection

The first step in site selection is developing a request for proposal (RFP). An RFP is a document that organizations use to solicit bids from vendors or suppliers that provide goods or services. Here are some key elements that should be included in an RFP:

- **Introduction:** Provide a brief introduction of your organization and the purpose of the RFP. Scope of Work: Clearly define the scope of work and the specific services or goods that are required. Include details such as quantities, specifications and any other relevant information.
- **Timeline:** Specify the timeline for the project, including any deadlines for submitting proposals, delivering goods and completing the work.
- **Evaluation Criteria:** Provide the evaluation criteria that will be used to assess the proposals, such as price, quality, experience and references.
- **Budget:** Clearly state the budget for the project and any constraints that may have an impact on the proposal. For example, some regions choose to hold their conferences at local high schools, community colleges, county facilities, etc., to keep costs down. (While these types of locations don't offer the same amenities as a hotel or convention center, they can offer a unique environment that lends itself to the career and technical aspect of the conference.)
- **Submission Requirements:** Provide instructions for submitting proposals, including the format, required documents and any other information that should be included.
- **Contact Information:** Include the contact information for the person or team responsible for the RFP, including name, email address, and phone number.

It's important to ensure that your RFP is clear, concise and includes all relevant information, so that vendors or suppliers can provide accurate and competitive proposals that meet your organization's needs.

Selection of the best conference site is an important decision that can impact the success of your event. Here are some key factors to consider when selecting a site:

- **Location:** Choose a location that is easily accessible for attendees. Look for a site that is close to major transportation hubs such as airports, train stations and bus terminals.
- **Capacity:** Make sure the site is large enough to accommodate your anticipated attendance. Consider not only the size of the event space but also of other areas such as parking lots, restrooms and catering facilities.
- **Amenities:** Look for a site that offers amenities such as Wi-Fi, audiovisual equipment and meeting rooms. These amenities can make a big difference in the success of your event.
- **Cost:** Consider whether the cost of the site fits within your budget. Be sure to factor in any additional costs such as catering, security and insurance.
- **Reputation:** Choose a site that has a good reputation in the industry. Look for reviews and testimonials from previous clients to get an idea of their experience.
- **Availability:** Make sure the site is available on the dates you need it. Be sure to book well in advance to avoid any conflicts.
- **Flexibility:** Choose a site that is flexible and can accommodate any special requirements you may have, such as special room setups, dietary needs or other accommodations.

For cases in which the MOU specifies that ACTE will be responsible for site selection and contracting, ACTE routinely partners with a third-party company that specializes in site selection and contract negotiations.

A contract is a legal agreement between a facility and an individual or organization. It outlines the terms and conditions of an event and typically includes details such as the dates of the event, the number and type of rooms required, the rates and fees for the rooms, food and beverage arrangements, any additional services or amenities requested, and the cancellation policy. It specifies the responsibilities of both parties, such as the facility's obligation to provide the agreed-upon services and the guest's obligation to pay for those services in a timely manner.

It is important to carefully review and understand the terms of the contract before executing it, as it is a legally binding agreement. If there are any questions or concerns about the contract, consult with a legal professional before signing. ACTE has connections to legal counsel, so if these services are needed, please reach out to ACTE headquarters.

It is recommended that contracts be executed through ACTE so that it assumes financial stewardship. If a host state chooses to assume the financial obligation of a contract, ACTE and the region shall have no financial responsibility.

Developing a budget contributes to the framework of your conference. It is the responsibility of the region vice president to see that all expenses fall within the budget. Some regions aim to make a profit, and others just need to break even. Regardless, there cannot be a deficit at the end of a regional conference.

- The annual conference is to be financed by a mix of registration fees, sponsorships and/or revenue from exhibitors.
- If money is needed in the planning stages, it is possible that seed money
- can be provided by the region or a state association.
- If region policy committee members will attend this conference, **refer to your region's policy and procedures manual** to determine how their travel expenses might be covered (e.g., in Region IV, all or part of the travel expenses for members of the Awards Committee may be covered if funds are available).
- Depending on the MOU, profits from the conference are to be distributed as follows: half to the ACTE region and half to the host state, or one-third to each party including ACTE.

Some aspects of the budget that need to be taken into consideration are as follows:

- Speaker fees Facility/room rental
- F&B minimum
- AV
- Internet
- Travel expenses for VIPs

[View a sample budget](#)

Call for Proposals /

In reference to conference programming, the call for proposals is a document that invites potential speakers, presenters or contributors to submit their ideas for talks, workshops, posters or other types of presentations that align with the conference's theme or focus. A call for proposals typically includes information about the conference, submission guidelines, speaker information and deadlines. Proposals should be submitted by a specific deadline, allowing for a working group of the planning committee to review, select and invite those who are chosen (please refer to subcommittee responsibilities above). This is typically done three or four months prior to the event to allow for the programming schedule and promotions to be developed and distributed.

Here are some key elements to include in a call for proposals:

- **Conference title and theme:** A brief description of the conference's focus, goals and theme. Since its implementation of the ACTE Quality CTE Program of Study Framework that lists the **12 elements of high-quality CTE**, ACTE has encouraged incorporation of one or more of the elements in regional conferences. It's important to tie in the call for proposals to the selected element(s).
- **Conference date and location.**
- **Submission guidelines:** Specific instructions for how to submit proposals, including the deadline, format and any other requirements.

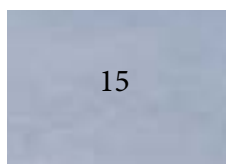
Review Process

- **Proposal requirements:** A list of the types of proposals that are being solicited, such as individual or panel presentations, workshops, posters or other formats.
- **Selection criteria:** Criteria that will be used to evaluate proposals, such as relevance to the conference theme, originality and potential impact.
- **Notification of acceptance:** The timeline for notifying presenters of acceptance or rejection of their proposals.
- **Logistics:** Information about logistics, such as available audiovisual equipment, accommodations and any travel expenses that will be covered for presenters.
- **Contact information:** Contact information of the conference organizers in case potential presenters have questions.

When creating a call for proposals, it's important to make sure the guidelines are clear and detailed, so potential presenters understand what is expected of them. It's also important to consider diversity and inclusion and to encourage submissions from a wide range of perspectives and backgrounds.

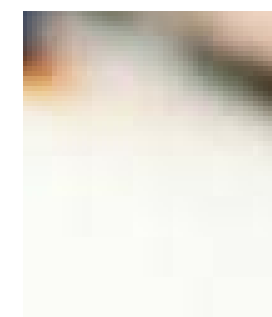
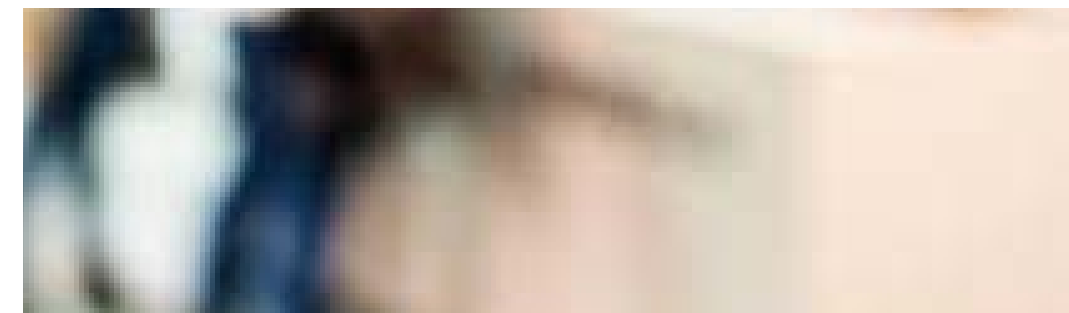
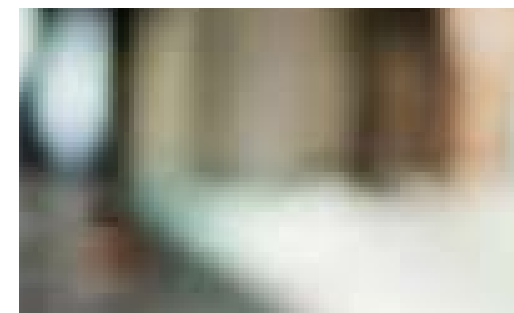
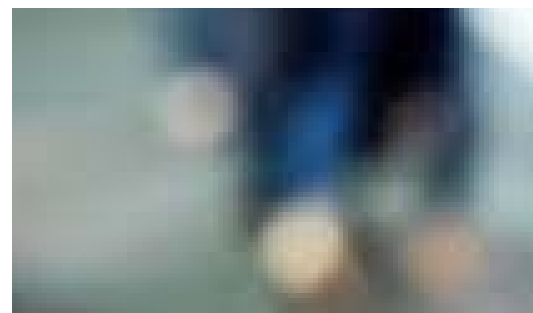
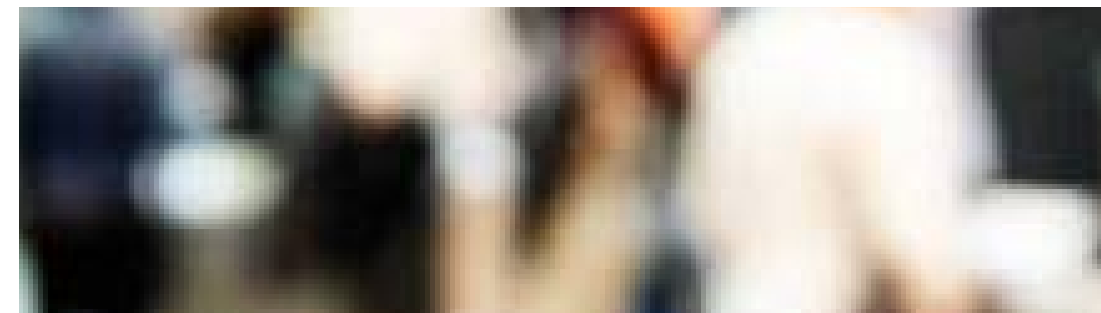
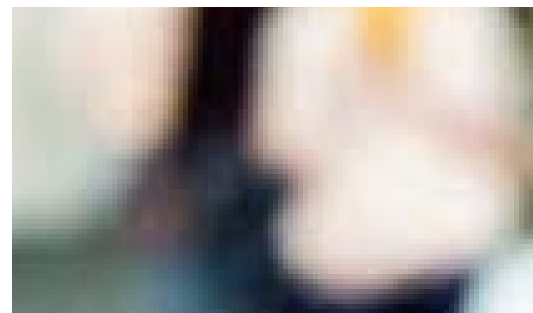
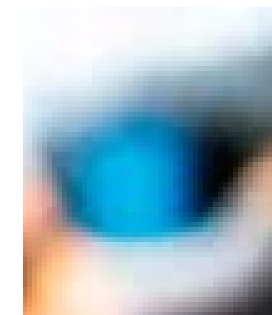
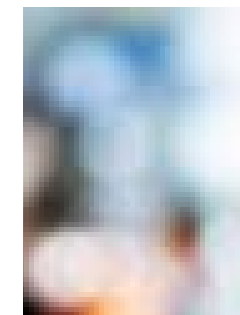
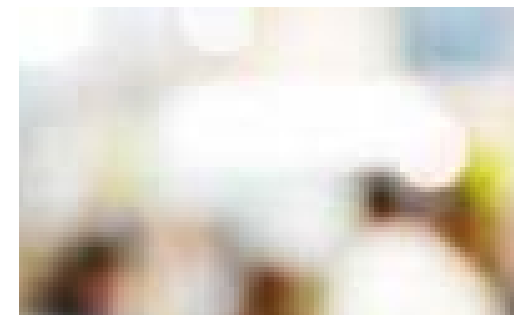
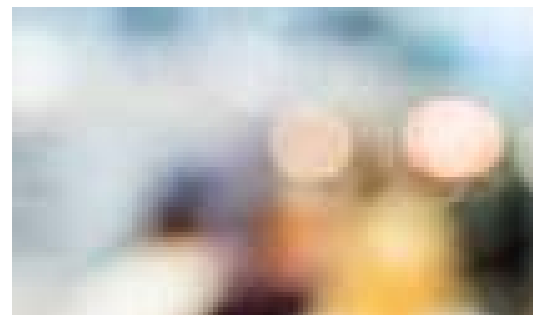
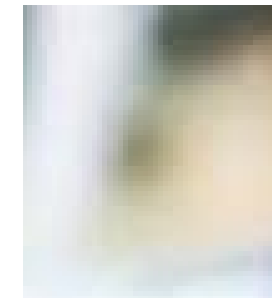
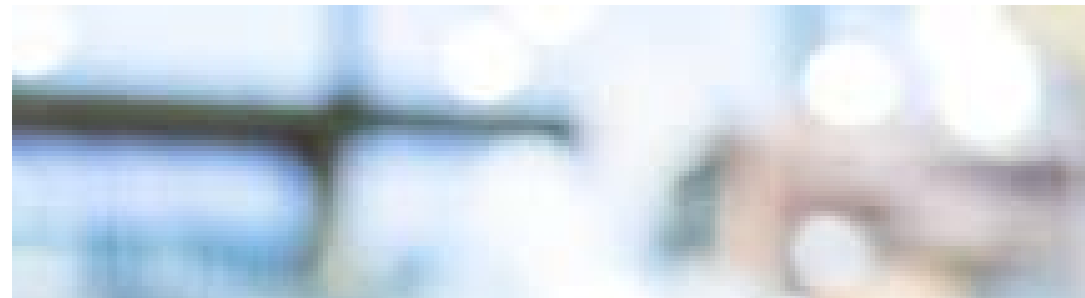
Example of a call for proposals

Once the call for proposals deadline has been reached, the review process begins. One of the first steps is to recruit your review committee (please refer to subcommittee responsibilities above).



Once the committee has been formed, submitted proposals should be distributed electronically to its members. Typically, they are distributed via an Excel document that displays all data collected from each submission. Here are a few things for the team to keep in mind when reviewing each proposal:

- Is the submission from a vendor or exhibitor? It is a best practice to avoid accepting proposals submitted from vendors or exhibitors. These presentations usually turn into commercial pitches. One complaint that routinely shows up on post-conference surveys is the disappointment with a session that turned into a sales pitch.
- Do the topics resonate with your intended audience? Will your potential audience see the agenda online and be moved to register based on the content?
- Do you have different states represented? Be sure to have a balance of speakers from each state in the region to increase attendance from those states.
- Do you have a diversity of topics? Diverse content that covers multiple subject areas is another best practice.
- Are the high-quality elements of CTE represented in the proposals? This should be a given, since the call for proposal specifically asks what high-quality element is represented.
- Is there a diversity of formats, such as single-speaker presentations, panel discussions, small group conversations, interactive activities, and so on? Having different presentation formats is another way of increasing attendance and reaching adult learners of all types.



Exhibitors and Sponsors

Exhibitors and sponsors play a vital role in the success of any conference. Exhibitors are typically businesses, organizations, and sometimes individuals that participate in a conference by showcasing their products, services or ideas. They typically purchase exhibit space to set up displays, handouts, samples and other marketing materials to attract attendees.

Exhibitors may include technology companies, educational institutions, government agencies, nonprofit organizations, and vendors of various goods and services that serve the CTE community. They often offer demonstrations or presentations to showcase their products or services to attendees.

For exhibitors, participating in a conference can be an effective way to promote their brand, generate leads and connect with potential customers or partners. It also gives them an opportunity to network with other businesses and stay up to date on industry trends and developments. **See an example list of exhibitors for a conference.**

Conference sponsors are businesses, organizations, or individuals that provide financial or other types of support to a conference in exchange for exposure and recognition. Sponsors may provide funding for various conference activities, such as keynote speeches, networking events or workshops. In return, they receive benefits such as branding opportunities, speaking slots, exhibit space or access to attendee lists.

Sponsorship provides many benefits to both the sponsor and the conference organizers. For sponsors, it can provide visibility and exposure to a specific target audience, help build brand awareness and recognition, and generate leads or sales. For conference organizers, it provides additional resources to enhance the conference experience and offset costs.

Sponsors can be categorized at different levels, such as Platinum, Gold, Silver, and Bronze, depending on the level of financial or in-kind support they provide. The higher the level of sponsorship, the greater the benefits and recognition provided to the sponsor.

Sponsorship is an important aspect of many conferences and events and can help to ensure their success and sustainability. Below are some resources to guide you in managing exhibitors and sponsors.

Board guidance on sponsorships

Board of Directors Guide to Commercial Engagement

Exhibitor/sponsor flyer template



Agenda / Program Guide

A conference agenda (aka schedule at a glance) is a document that outlines the events of a conference or meeting. It lists the specific sessions, topics, speakers and times for each activity that will take place. The agenda is typically distributed to attendees prior to the event to help them plan their attendance and make the most of their time at the conference.

The following are typical elements and activities that can be included in an agenda:

- Pre-conference activities, e.g., workshops or tours
- Meal events such as breakfast, lunch or breaks
- Opening ceremonial activities, e.g., presentation of the flags and Pledge of Allegiance
- Opening remarks by conference organizers or a keynote speaker to set the tone of the event

- Opening and closing general sessions
- Keynote speeches
- Panel discussions
- Breakout sessions on specific topics, led by subject matter experts or industry leaders
- Networking opportunities such as receptions or meals
- Closing remarks

Sample agenda / schedule at a glance

Program guides come in many formats. Traditionally, the program guide is a printed booklet-style document that lays out each day of the event page by page. More recently, conference planners have moved toward electronic conference apps. Which format you choose should be based on your budget and your attendees. Some attendees prefer to

have a physical paper program guide that they can take back to their organization as a post-conference reference. Others prefer an app that is readily available on their cell phone. Regardless of which format is chosen, there are key elements that need to be included:

- Welcome letter
- Agenda/schedule at a glance (date, time and location of sessions)
- Keynote speaker info
- Program session info (title, description, speaker bio, etc.)
- Exhibitors Sponsors
- Date of the next conference
- Facility floor plan
- Networking events

A well-planned and organized conference agenda can help to ensure that attendees have a valuable and productive experience at the conference.

[Sample program guide](#) | [Sample list of event apps](#)



Event Orders

Event orders for conference facilities are documents that outline the details of the various activities that will take place during a conference or meeting. They are typically prepared by the conference planners and shared with the facility's staff, who are responsible for executing the events and ensuring that all the details are attended to. An event order typically includes information such as the date and time, a brief description, and any equipment or services required.

Below are some common types of event orders submitted to conference facilities:

- **Banquet event order (BEO):** Outlines the details of a banquet or meal, including the menu, seating arrangements, service times, and any special requests or dietary restrictions
- **Audiovisual event order (AVEO):** Lists the equipment and services required for audiovisual presentations, such as microphones, projectors, screens and sound systems
- **Meeting room event order (MREO):** Outlines the details of a meeting or conference session, including room setup, seating arrangements, and any equipment or services required
- **Rooming list:** Provides details of the guest rooms needed for conference attendees, including guest names, check-in and checkout dates, and any special requests or preferences
- **Food and beverage:** Menu choices, attendance guarantees and dietary requirements
- **Room setup:** Meeting rooms can be set up in various configurations to accommodate different presentation styles: theater style, table rounds, classroom style, etc. Facilities often charge for making changes to room setups once the event has started, so be sure to think through your spacing needs beforehand to avoid those fees.

Sample Event Order



On-site Management

On-site management of conferences entails overseeing several areas of concern. Below are some of the domains to consider:



- **Registration:** The registration area is typically attendees' first experiences of an event. Because of this, it is important to strategically plan your registration placement, flow, signage and staffing. The registration area should be located central to conference events, be easy to locate and navigate, and be sufficiently staffed to handle the volume of attendees. It is at the registration area where attendees obtain critical information and necessary materials: conference credentials (badges, lanyards, ribbons, etc.), tote bag, and program guide or credentials for the conference app. Attendees should leave the registration area feeling fully equipped with all the information and supplies they need for a successful experience.
- **Shipments:** As your conference is about to begin, you need to consider the transportation and setup of any equipment, displays, hand-outs or other materials prior to the advertised start time. You will need to confirm with the facility the times when you or your team can have access to storage and staging of items. To ensure ease in movement of materials, be aware of your access to loading areas and have a handcart and box cutters available to assist in the movement of materials and the opening of boxes. Another consideration is confirming with the facility when your exhibitors and presenters are allowed to arrive and set up their displays.
- **Daily bill review with catering service and reservations managers:** A daily banquet check review allows you to address any billing errors in real

time. It's much easier to correct a mistake while still on-site than trying to recoup or reimburse after the fact. It is also a good practice to meet with your reservation manager to discuss any housing discrepancies.

- **Pre- and post-conference meetings with the facility:** Meeting with facility staff before and after the conference is highly recommended, as it offers the opportunity to discuss in detail the objectives and outcomes of the conference. Often these meetings include key department heads of the facility, with whom you will have the opportunity for one-on-one conversations to discuss specific concerns regarding your event. The pre-conference meeting is especially important because it sets the tone for the success of the conference. "Post-cons" are a good idea as well to discuss any important matters that should be addressed sooner rather than later.
- **Daily staff meetings:** Daily meetings with your planning team give you and your team the opportunity to discuss any areas of importance for that particular day. This is also the time to address any issues from the previous day to avoid their recurrence.
- **Keynote speaker rehearsal:** Holding speaker rehearsals is a best practice that is well worth the time. During the rehearsal, the flow of the session plays out in real time, allowing all involved not only to practice but to solve in advance any technical or logistical challenges that come up.
- **Crisis management:** Be prepared to handle unexpected situations or emergencies during your event, such as technical failures, medical incidents or security issues. Having contingency plans to address such events is critical. It is recommended that you work with your facility contact to establish communication protocols with relevant authorities to address any crises that may arise. Most facilities have their own crisis management plan. Be sure to obtain a copy, share it with your team and make sure it is saved somewhere easily accessible.

Effective communication, attention to detail and problem-solving skills are essential for successful on-site conference management. Teamwork between the planning committee, facility staff and other stakeholders will ensure a smoothly run event that results in your attendees having a positive and memorable experience.

Promoting the Conference

Promoting a conference requires careful planning and effective strategies to attract attendees and create buzz around the event. Below are a few ways to achieve a successfully promoted event:

- **Define your target audience:** Determine who your conference is intended for and identify their interests, needs and preferences. This will help you tailor your promotional efforts to reach the right audience.
- **Craft a compelling message:** Develop a clear and concise message that highlights the value and benefits of attending your conference. Emphasize what sets your event apart and why it is a must-attend for your target audience.
- **Create a conference website:** Build a dedicated website that offers comprehensive information about the conference, including the schedule, speakers, topics and registration details. Ensure that the website is user-friendly, visually appealing and optimized for search engines. ACTE has resources for this and will work with you to create it. ACTE will update the region website upon receipt of conference information.
- **Use email marketing:** Develop an email marketing campaign to reach out to potential attendees. Segment your email list based on demographics and interests, and send personalized invitations and reminders.
- **Collaborate with CTE partners:** Partner with industry influencers, organizations and relevant websites to expand your reach. Seek opportunities for cross-promotion, guest blogging or interviews to tap into their existing audiences. ACTE often collaborates with affiliates such as career and technical student organizations (CTSOs) and other CTE organizations to exhibit at each other's events and also to market each other's events. This is a common practice that has proven to be successful for promotion.
- **Engage with your audience:** Actively engage with your audience on social media, your website and other channels. Respond to inquiries promptly, participate in relevant discussions and encourage conversations around the conference topic. Consider hosting live Q&A sessions or webinars to build anticipation and answer questions.
- **Use print promotion:** Distribute printed materials such as flyers, posters or brochures at CTE events. ACTE routinely sends printed marketing materials to other partner events such as HOSA, DECA, ISTE, etc. ACTE will include the Region Conference dates on the Calendar of Events on its website and in Techniques magazine.

With a comprehensive marketing plan and a strategic approach, you can successfully promote your conference and attract a diverse and engaged audience.

Sample marketing materials:

- **Conference brochure**
- **Save the Date**
- **Website graphics**

For more information on promotions and marketing, please contact ACTE's senior director of communications.



Post-conference Considerations

Surveys

A post-conference survey is a feedback tool used to gather information from conference attendees about their experience and satisfaction with the event. The survey is typically sent to attendees within a week after the conference has ended and can be administered through email, an online survey tool or in person.

Post-conference surveys typically include a range of questions to help conference organizers better understand what worked well and what could be improved in future events. Below are some common questions to include in a post-conference survey:

- How satisfied were you with the conference overall?
- How would you rate the conference venue and facilities (e.g., meeting rooms, food, parking)?
- How would you rate the quality and relevance of the conference sessions and speakers?
- How would you rate the networking opportunities at the conference?
- How would you rate the registration process and logistics (e.g., signage, directions)?
- What suggestions do you have for improving future conferences?
- Would you attend this conference again in the future?
- Would you recommend this conference to others?

Post-conference surveys can provide valuable insights into the strengths and weaknesses of the conference and help conference organizers make informed decisions about future events. And they give attendees an opportunity to share their feedback and contribute to improving future conferences.

Sample Survey

Thank-you Emails

Sending a post-conference thank-you email is a great way to express gratitude to attendees for their participation and to keep them engaged with your organization or event. Here are some tips on how to write an effective post-conference thank-you email:

- Address each attendee by name and mention specific sessions or events they attended to make the email feel more personalized and thoughtful.
- Begin the email by expressing your sincere gratitude for their attendance and participation in the conference. Thank them for their time and contributions to the event.
- Recap the main themes and key takeaways from the conference to reinforce the value of attending and to keep the content fresh in their minds.
- Include links to resources or presentations from the conference, so attendees can continue to learn and engage with the content.
- Invite attendees to share their feedback about the conference and how it can be improved in the future.
- If you have future events or conferences planned, include information about them to keep attendees engaged and interested in your organization.
- Close the email by encouraging attendees to stay connected with your organization, whether through social media, email newsletters or future events.

Sending a post-conference thank you email can help build goodwill with attendees and keep them engaged with your organization. Also consider sending thank-you notes to the following partners:

- Speakers
- Exhibitors/sponsors
- Facility team (catering, AV, etc.)

Post-conference Debriefing

A post-conference debriefing is a meeting or discussion held after a conference to evaluate its effectiveness and identify areas for improvement. It is typically attended by the conference organizers, key stakeholders, and team members involved in the planning and execution of the event.

Here are some tips for conducting an effective post-conference debriefing:

- Define the goals and objectives of the debriefing, such as evaluating the success of the conference, identifying areas for improvement, and developing action plans.
- Collect feedback from various stakeholders, including attendees, sponsors, vendors

Post-conference continued ...

and team members, to gain a comprehensive understanding of the conference's strengths and weaknesses.

- Analyze data and metrics, such as attendance rates, survey results and revenue generated, to assess the conference's overall performance and impact.
- Identify areas where the conference could be improved, such as in the content, format, logistics, marketing or engagement strategies.
- Create actionable plans and strategies to address the areas identified for improvement, and implement changes for future conferences.
- Acknowledge and celebrate the successes and achievements of the conference, such as record attendance, positive feedback or new partnerships.
- Assign responsibilities and tasks to team members and stakeholders to ensure that the action plans are executed effectively and efficiently.

Post-conference debriefing is a critical step in the conference planning process, as it allows organizers to learn from the experience, improve future events and ensure continued success.

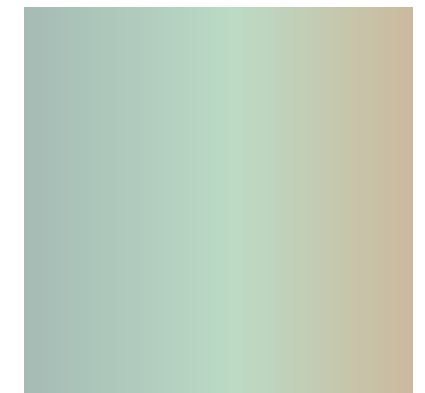
Bill Reconciliation

Conference bill reconciliation is the process of reviewing and reconciling all expenses related to a conference in order to ensure accuracy and completeness of the bill. It involves comparing the final bill from the hotel or conference center with the original contract, event orders, and other documents to ensure that all charges are correct and accounted for.

Here are some steps to follow for conference bill reconciliation:

- Gather all relevant documents related to the conference, such as the contract, event orders, invoices and receipts.
- Check the original contract to ensure that all terms and conditions were met and that there are no discrepancies.
- Review the event orders to ensure that all services and items ordered were delivered and billed correctly.
- Verify that all invoices and receipts are accurate, correspond to the services received, and include any applicable taxes and gratuities.
- Check room charges to ensure that all attendees were charged the correct rate and that any room-block credits or complimentary rooms were applied correctly.
- Verify that all food and beverage charges are accurate and align with the number of attendees and the menu items ordered.
- Check audiovisual charges to ensure that all equipment and services were delivered as ordered and that there are no discrepancies.
- If there are any discrepancies or errors, contact the hotel or conference center immediately to resolve the issue and adjust the bill accordingly.
- Once all discrepancies are resolved, approve the final bill and pay it promptly to avoid any late fees or penalties.

By following these steps, conference organizers can ensure that the final bill accurately reflects the expenses incurred during the conference and that there are no hidden or unexpected charges. ■



Thank You!

We hope this toolkit is a helpful resource for you and your planning team.

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