Country School Association of America

Annual Conference

Planning Guide

Prepared by the CSAA Board of Directors

September 2009

Purpose

The purpose of this publication is to aid in the development and execution of future CSAA conferences. This is the result of lessons learned over the last decade of conferences planned and executed by member volunteers. Undertaking a conference is a huge project that brings with it a responsibility of maintaining and hopefully enhancing the reputation of the CSAA, as well as educating the country schoolhouse constituency group across the country. We have been lucky to have past conference chairmen who volunteered so much time and energy to produce great conferences and then contributed that knowledge to the publication of this document.

These guidelines are a living document that will continue to adapt and grow as our organization continues to grow. As you utilize them, make notes for incorporation into future publications and pass them on to the CSAA board of directors when they meet at your site.

Mission

The CSAA brings a diverse group of individuals together including Museum volunteers, teachers, staff, faculty and students, preservationists, historians, re-enactors and interested citizens, to exchange ideas and resources. The CSAA holds an annual conference, provides a grant program, awards publication and video prizes, conducts surveys and publishes an electronic newsletter, all in support of the country schooling experience.

The CSAA is for people who wish to preserve schools, create or maintain museums, promote living history programs, and allow children of all ages to experience schooling as it was many years ago. It allows seniors a chance to relive their fondest schoolhouse memories, while offering educators and writers a forum to share research. Additionally, this organization encourages research on country schooling and provides a forum for those who wish to publish their articles. The annual CSAA conference grows larger as a forum for exchanging ideas among academics, preservationists, re-enactors, and history buffs.

Goals

The CSAA conference is intended to support our mission by providing a forum for interchange of ideas, materials, information, issues and resources.

- Provide educational opportunities for participants – *workshops, key note speaker, sessions*
- Provide networking opportunities – *social activities, receptions, breaks*
- Provide technical information – *sessions, workshops, groups*
- Introduce participants to historic sites and museums – *rotate conference location, visit conference site historic locations, tour local schoolhouses*
- Conference available to all – *closely monitored costs, rotating conference location, college campus locations with dorm option*
- Attract new members – *cost effective conferences, rotating conference locations*
- Promote sharing of research on country schools – *workshops, groups, sessions, speakers*

Site Selection Process

Items to consider when selecting location and chairperson for future conferences

- CSAA member
- Site (with an effective chairperson) volunteering to host conference
- Board member (conference coordinator) support for site
- Geographic location – within rotating regional boundaries set out by board of directors
- Facilities – sufficient meeting space and cost-effective lodging
- Human, financial and audio visual resources available

Job Responsibilities Pertaining to Conference

- **Conference Coordinator –** is a member of the CSAA board of directors that acts as the liaison between the conference chair and the board. This person acts in an advisory manner assisting the conference chair in the organization of the conference.

  - Works with conference chair on a regular basis during the year prior to conference
  - Oversees progress during the year and final report to board
  - Actively reviews and proposes revisions to these guidelines

- **Host Site/Institution** – The host organization, college, university or museum in its normal operation of business, may allow staff to make phone calls and photocopy materials for the conference. A conference web page could also be created and included on the organization, university or museum web page.

- **Conference Chair** – is an individual, approved by the board of directors, who organizes the conference and will take on a two-fold responsibility of covering local arrangements as well as developing a program and hosting the conference. Program responsibilities include sessions, workshops, field trip, social activities, resource or group meetings and keynote speaker (if utilized).   This individual is basically the operating manager of the conference. He or she is encouraged to set up committees to assist in conference operation and development. The chair and all presenters are expected to register and pay the registration fee to attend the conference. Volunteers who do not attend sessions or meals (except when working) and CSAA grant recipients and award winners who attend only the award dinner do not need to register or pay fees.

  - *Qualifications*

    - CSAA member
    - Attended a recent conference
    - Works for (or have a close working relationship with) host institution
    - Ability and willingness to commit significant time before and during the conference

Conference Chair Details

- **Theme** (if applicable)

  The theme should try to reflect the strengths of the host site, current issues or timely topics pertaining to country schooling. Try to organize around this thematic approach and not just a slogan or catchy title. If a conference is planned and executed utilizing this guide, then a successful conference should be the ultimate result regardless of whether it is organized around a theme.

- **Program**

  The program is the main reason people attend a conference. An exciting, well organized and informative program will ensure the success of the conference. After selecting the theme (if applicable) the conference chair should begin the process of developing the list of presenters and topics and identifying session ideas, workshops and potential speakers.

  - Sessions and workshops should try to include education, interpretation, curatorial activities, administration, social history, material culture and local topics.
  - Try to review previous conference evaluations for topics, speakers and workshops.
  - Some sessions from previous conferences can possibly be further elaborated.
  - The call for papers should generate additional ideas.
  - Try to find leaders in the fields of topics selected. Non CSAA members may have more breadth of knowledge and a unique or challenging perspective. Be cautious of collectors, antique dealers or speakers with only a commercial or personal interest in attending.
  - In general, sessions should try to represent the diversity of the host site, local area, region, state and CSAA membership interests.
  - Keynote speaker (if applicable) should set the tone for the conference by providing a valuable level of knowledge and hopefully an inspirational presentation.
  - Compensation for the keynote speaker may or may not be appropriate (flat fee/travel) keeping conference budget in mind.
  - Try to offer a range of workshops that will provide a high quality, hands-on experience for attendees. Keep in mind that a smaller group size usually maximizes a learning situation.
  - All workshop and session expenses must be covered by the conference registration fee. Additional material costs for workshops (if any) may be specified in the registration process.
  - Workshops, sessions and the bus tour (workshop) should be filled on a "first come, first served" basis – all conference participants will be treated equally.
  - Presenters, speakers and session leaders must pay registration fees to attend the conference.

- **Presenter Guidelines**

  The CSAA is an organization that functions with volunteer leadership, including the board of directors and conference planners and all conferences operate as self-funding. Membership in the organization implies sharing time and talents without reimbursement. As such, the board of directors has determined:

  Financial compensation for speakers, presenters and workshop leaders will not be provided, nor will waiver of conference fees, meals, lodging or travel expenses be granted except for possibly the (optional) key note speaker

- **Program Registration Materials**

  The program registration materials or "registration packet," can be a main selling point and promotional piece for the conference. It must arrive on time, answer pertinent questions, and provide the information needed by attendees before they arrive. The published conference guide/schedule and supporting details can be emailed and distributed again at registration to save postage.
  - The registration packet should include a written welcome invitation letter, driving and flying instructions from ALL directions that lead directly to the registration table, map of the region, and city, and site, with functional locations identified, directions to lodging, on and offsite. The host institution may already have much of this information on its website. Have someone that is NOT familiar with the site check directions for clarity.
  - Schedule at a glance – a short, succinct version that includes all conference functions, times and locations (registration, meals, workshops, sessions, etc)
  - Detailed schedule of conference sessions, workshops and activities.
    o Registration location and times.
    o Session and workshop description, topic, title, time, location, leader/presenter name, job title or site, organization or company they are from.
  - Lodging information – Per person/per room cost (+ taxes), phone number, website, registration deadlines, type of facilities (amenities) and special needs accessibility
  - Registration information – Payment requirements (cash, check, money order, PO, credit cards), number and type of credit card accepted, checks payable to CSAA, early registration fee and deadline. If not included in registration fee, meal expense, with approximate cost if cafeteria is used. Conference registrar mailing address, phone and email for questions.
  - Registration Form:
    o Name, organization, address, 2 phone numbers (chosen from day, evening, cell, home, work) and email address.
    o Selection for fees – Full conference, single day, early registration, late registration, student, CSAA membership, bus trip etc.
    o Charge card number, type (Visa, Master Card, Amex), name on card, expiration date and signature.
    o Check boxes for speaker, presenter, workshop leader, first-time participant, special needs (ADA).
    o Cancellation policy clearly spelled out on form. Cancellations received up to 20 days before the conference are refundable minus a $10 registration fee. Substitutions may be made at any time.

- **Promotion**

  Advanced promotion of the conference may be aided by using the CSAA newsletter, website, existing email addresses and mailing lists as well as inclusion on the host website.

  - The conference is on the CSAA website for the whole year – starting at the conclusion of the previous conference. This is the webmaster's responsibility.
  - It could also be included in the newsletter several times during the year. Conference chair will submit the newsletter articles as desired.
  - Call for papers should be an effective presentation generating notice as well as to publicize the conference and should occur 12 months prior to the conference - conference chair responsibility – it should include US Mail (local, site and national), email (webmaster) and newsletter (editor).
  - An advanced press release should contain everything publicized in the *call for papers* along with added conference program items, then removing items specific to just the *call for papers*. Conference chair to distribute locally and nationally by US Mail to the CSAA mailing list. Also distribute to the CSAA webmaster and newsletter editor for additional distribution electronically.
  - Timely press releases go out a few weeks in advance of conference. Provide pictures and write up to local news outlets. Try to find a board member or volunteer to prepare and distribute the release. The host institution's public relations officer may be willing to assist with this task.
  - Next year's conference location, times and dates should be prominently displayed on conference material at this year's conference.

- **Conference Follow Up**

  As mentioned earlier, thank you letters should be provided to all presenters, speakers and workshop leaders before (or after) the conference, thanking them for their time and effort.

  - For many, acknowledgment is an important performance indicator within their organization. You may want to consider preparing a thank-you letter and including it with the program materials.
  - The CSAA board executive director will send a thank you note to the host-site thanking them for their service and support.

- **Finances and Fees**

  The goal of producing a high quality, professional conference, while at the same time trying to minimize costs without losing money, can be a daunting task. The chair will have to recognize and calculate all the costs associated with the conference to ensure a financially successful conference.

  Generally the conference finances are worked through the CSAA treasurer. The chair will accept registrations and the treasurer record and deposit all revenues. The treasurer will pay all bills submitted by the chair. It is vital for the chair to keep accurate records and submit invoices in a timely manner. Donations and sponsor grants are also considered conference revenue.

Assembling various preliminary budgets with several different options and break-even points will help answer questions and guide the chair and conference organizers when they choose the final break-even point (25-50-75 attendees) and conference budget. Please note that while the CSAA is a federally tax exempt 501(c)(3) organization, not every state may recognize this status and as conference costs are calculated, do not forget service fees or taxes that may apply.

The conference registration fee is determined by adding all conference expenses together and dividing by the break-even number of attendees chosen above. Generally 50 is the number chosen to work with for our conference. Every effort should be made to keep the registration fee as low as "high quality" will allow. Throughout the registration process the chair will need to work closely with conference workers and organizers to accommodate requests or questions from registrants.

Early registration is based on the break-even point and usually ends 1-2 weeks before the conference begins. If conference organizers allow for late registration, a penalty should be added to the registration fee. This late penalty should be noted in the registration application.

Conference organizers associated with a College or University may be required to use the services of an on-campus conference office, including credit card services, otherwise use CSAA credit card capabilities. If people are able to pay with a credit card, more may attend the conference, but arrangements should be made well in advance.

- **Meeting Space**

  A crucial part of planning a conference is selection of the facilities. Considerations should include size of the rooms, proximity to other venues and common meeting places, lighting, outside noise and other factors that may be site specific.

  - **Workshop/Session Rooms:**

    o The rooms must be large enough to accommodate the sizes of the various sessions. Some sessions will be more popular than others, even if they are held at the same time. Usually they do not have to be the same size; however, keep in mind that at least one of the session or break out rooms should be able to accommodate slightly more than half of the expected attendees at the same time.
    o Working within the budget, prepare for the AV equipment needs for each session. Check with the conference site for their AV rates or if included in room rates.
    o Check registration forms to determine final room size needed for specific sessions.
    o Ice water should to be available in each room for sessions.

  - **Common Meeting Room:**

  For the Keynote Speaker, video presentations, general business meeting and other common meeting gatherings there will be a need for a meeting room able to accommodate all of the expected attendees. This could be the same meeting room as the dining area if dining is being accomplished, on-site using a banquet style.

- **Vendor/Poster Area:**

A vendor, brochure and literature area, with tables, may be provided for attendees to display posters, books, pictures and other artifacts from their schoolhouse/museums and companies. This could also have a limited number of chairs be used as an additional break-out room where poster sessions are conducted (if applicable).

- **Dining Area:**

A dining area will be needed for breakfast, lunch and dinner (unless the site cafeteria is used). Set-up and clean-up should seriously be considered if meetings or sessions are held before or after a meal in the same room. It is sometimes difficult to use a dining area for sessions or workshops immediately before or after a meal because of set-up activities and noise.

- **Accessibility/ADA Requirements:**

In order for a conference to be as accessible to all attendees as possible, a space on the registration form should be provided for attendees to note special needs or accessibility concerns and conference organizers should include them in the planning.

- **Lodging**

Conference lodging should be comfortable and convenient to the meeting space. The chair should view or inspect all lodging options before selecting each facility. If dorm space is available, it should be air-conditioned, and motel/hotel accommodations should include negotiations to secure a flat per night rates to allow 1, 2, 3 or 4 individuals to share a room.

  - Factors to consider in selecting conference lodging include:
    - Number of total rooms available (double/single rooms and suites)
    - Cost of lodging options (dorm, motel, hotel, etc.)
    - Accessibility of lodging
    - Smoking and non-smoking rooms
    - Location of lodging in relation to conference site
    - Restaurants and dining facilities

- **Meals and Breaks**
  Care needs to be taken when considering food at a conference. Food, meals and breaks are the largest percentage of registration cost and the issue that generates the strongest opinions. The challenge facing conference organizers is to balance quality meals with cost.

  - When selecting menus the conference organizers should sample food prepared by the site early in the planning process. If food (or the menu) chosen for the conference prove to be weak or substandard, make necessary changes.

  - When selecting menus consider special dietary needs including religious (fish), philosophical (vegetarian) and common food allergies. This consideration really falls under the responsibility of the facility staff (the chef) but should be included as part of the site selection process.

- The food offered to participants during breaks is an important component of the professional and social atmosphere created during the conference. Unfortunately, the cost is usually fairly high for food and beverage during breaks. Pastries, cookies, fruits and vegetables make excellent break food, keeping in mind not everyone wants just sweet offerings. Plan on hot and cold beverage options. Consider sponsors to support a break. If cost becomes an issue, break food should be considered as one of the first items cut from the budget. **NOTE:** A no cost option would be to ask for the remaining items from the previous meal to be left on a separate table. For example water, juices, coffee, pastry and fruit from breakfast, and tea, water and deserts from lunch, etc…

- **Transportation**

  Transportation for the schoolhouse tour is something that the chair needs to plan well in advance. The use of 20 passenger vans from the host site (college or university) or renting a full 57 passenger motor coach is part of that decision along with cost and budget. Social functions and/or local site visits during the conference may also require some form of shuttle transportation. Compare price quotes from various sources for all the conference transportation needs. Try to approach sponsors to assist in funding the needed transportation. The (optional) 3rd day schoolhouse bus tour can be set up as a "workshop" in order to facilitate attendee funding for this activity. An optional tour guide or historian could also be provided.

- **Schedule**

  The conference covers approximately 3 days which includes a schoolhouse tour (workshop) on the last day. The conference usually starts on the Monday immediately following Father's Day in June. Registration for conferees normally starts on Sunday. Sunday also has a time and location provided for the CSAA annual board of directors meeting. Main registration for the conference attendees continues on Monday with the first two days of the conference devoted to the welcoming address, keynote speech (if applicable) sessions, workshops, meetings and possible social events with the last day for the bus tour (workshop). During the second day or evening a time is provided for the annual CSAA general membership meeting, then a possible social or video event (if applicable).

  - Opening Session – Welcome, introductions and general announcements (executive director and conference chair)
  - Regular Sessions and Workshops – 30 min to 90 min (include discussion and question time). Can be set up as 2-3 sets of sessions in the morning and afternoon of each day.
  - Breaks – 10 minutes to 30 minutes long
  - Afternoon Options – It is possible to offer additional activities outside the regular conference offerings by ending a little early and provide for this activity to fit in prior to dinner. This can include unique local sites or onsite visits to places with special attributes such as historic sites, exhibits, collections, libraries, museums, behind the scenes tours, etc.
  - Meetings – A CSAA board meeting is provided for on Sunday afternoon. The annual membership meeting is held on the second day or evening with an optional short board meeting immediately following. This second board meeting is to welcome any newly elected officers and board members as well as answer any questions that came up during the conference or handle action items from the previous board meeting.

- Social Events (optional) – Opening reception, banquet, evening video offering, offsite activity at museum or some other site.

- **Communication**

  - **Prior to conference:** Program and registration material should be sent out 10-12 weeks prior to conference.

  - **Upon arrival:** A seamless stream of information should be available when participants arrive and should carry throughout the conference. Communication includes signs and labels that lead the attendees from the parking lot to the registration table and beyond. Good communication is essential to an excellent experience by all.

  - **During registration:** Conference participant packet

    - A pocket folder or goodie bag with paper tablet, pen or pencil. This should also contain the final conference schedule, including times and location for all conference functions.
    - Participant and speaker information (list)
    - Local information, maps, restaurants
    - Maps to offsite functions
    - Name tag
    - Provide extra supplies to conference registration workers like tape, scissors, ribbons, paper, pencils, site phone numbers (security, information systems, dorm problems, etc).
  - **Throughout conference:** Identify rooms and meeting areas by posting signs, labels and making announcements at any general meetings. To aid in messaging and communication provide a bulletin board that is accessible to all.

Budget

Developing a conference requires the gathering of multiple sets of data which help determine the break-even point, which ranges from 25-75 people. Below is a template for developing a conference budget. This helps the planners identify the expenses and then determine the correct registration fee to cover them.

People or businesses receiving payment should have a signed contract for the service provided. Original copy of the contract should be retained and provided to the Treasurer at the completion of the conference with all other financial documents.

CSAA (SAMPLE) CONFERENCE BUDGET

EXPENSES	Comments	1 Per	25 Per	50 Per	75 Per
FOOD (if applicable)					
Meals:					
1st day breakfast		$10.00	$250.00	$500.00	$750.00
1st day lunch		$12.00	$300.00	$600.00	$900.00
1st day dinner		$14.00	$350.00	$700.00	$1,050.00
2nd day breakfast		$10.00	$250.00	$500.00	$750.00
2nd day lunch		$12.00	$300.00	$600.00	$900.00
2nd day dinner	*Banquet*	$16.00	$400.00	$800.00	$1,200.00
3rd day breakfast		$10.00	$250.00	$500.00	$750.00
3rd day (box lunch)	*Provided by Joe's Deli*	$0.00	$0.00	$0.00	$0.00
Breaks:					
1st day AM break	*Covered by Wells Fargo*	$0.00	$0.00	$0.00	$0.00
1st day PM break	*Cookies & drinks*	$8.00	$200.00	$400.00	$600.00
2nd day AM break	*Coffee & pastries*	$7.00	$175.00	$350.00	$525.00
2nd day PM break	*Covered by Hecht and Associates*	$0.00	$0.00	$0.00	$0.00
FACILITY RENTAL					
Room Rental:					
Social/reception room		$0.00	$0.00	$0.00	$0.00
General assembly room	*Garamond Hall auditorium*	$300.00	$300.00	$300.00	$300.00
Session rooms	*Classroom 204, 206*	$250.00	$250.00	$250.00	$250.00
Dining room	*Included in food cost*	$0.00	$0.00	$0.00	$0.00
Break-out / vendor / poster		$0.00	$0.00	$0.00	$0.00
Silent auction room	*Sylvester Room*	$100.00	$150.00	$150.00	$150.00
A V Equipment:					
Overhead Projector		$75.00	$75.00	$75.00	$75.00
Slide projector		$0.00	$0.00	$0.00	$0.00
PA system	*Lapel microphone included*	$150.00	$150.00	$150.00	$150.00
VCR/DVD player		$50.00	$50.00	$50.00	$50.00
Laptop		$200.00	$200.00	$200.00	$200.00
PowerPoint	*Included with laptop*	$0.00	$0.00	$0.00	$0.00
Tech Support	*$200 per day x 2 days*	$400.00	$400.00	$400.00	$400.00
SOCIAL (if appl)					
Room		$0.00	$0.00	$0.00	$0.00
Transportation		$0.00	$0.00	$0.00	$0.00
Entertainment		$0.00	$0.00	$0.00	$0.00
SPEAKERS (if appl)					
Keynote honorarium	*Donated by Excel Corp*	$200.00	$200.00	$200.00	$200.00
Presenter fees/reimburse		$0.00	$0.00	$0.00	$0.00

EXPENSES (cont)	Comments	1 Per	25 Per	50 Per	75 Per
SUPPORT					
Printing (prog & reg matl)		$12.00	$300.00	$600.00	$900.00
Postage	*Gift in kind from Host Site/College*	$0.00	$0.00	$0.00	$0.00
Phones	*Gift in kind from Host Site/College*	$0.00	$0.00	$0.00	$0.00
Name tags		$1.50	$37.50	$75.00	$112.50
Photo copy services	*Gift in kind from Host Site/College*	$0.00	$0.00	$0.00	$0.00
TOTAL EXPENSES:		$1,987.50	$4,687.50	$7,500.00	$10,312.50

	Cost per person	$1,987.50	$187.50	$150.00	$137.50
	Registration fee for planning purposes			**$150.00**	

EXPENSES	Comments	1 Per	25 Per	50 Per	75 Per
HOUSING					
On-site (dorm) rooms	*$20/night @ 4 nights*	$80.00	$2,000.00	$4,000.00	$6,000.00
TOTAL EXPENSES:		$80.00	$2,000.00	$4,000.00	$6,000.00

	Cost per person	$80.00	$80.00	$80.00	$80.00
	Housing cost for planning purposes			**$80.00**	

EXPENSES	Comments	1 Per	25 Per	50 Per	75 Per
BUS TOUR using vans					
20 passenger vans	*2 vans @ $300*	$600.00	$600.00	$600.00	$600.00
TOTAL EXPENSES:		$600.00	$600.00	$600.00	$600.00

	Cost per person	$600.00	$24.00	$12.00	$8.00
	Half-day bus tour for planning purposes			$15.00	

EXPENSES	Comments	1 Per	25 Per	50 Per	75 Per
BUS TOUR motor coach					
57 person motor coach	*1 bus (add meal expenses also)*	$900.00	$900.00	$900.00	$900.00
TOTAL EXPENSES:		$900.00	$900.00	$900.00	$900.00

	Cost per person	$900.00	$36.00	$18.00	$12.00
	Full day bus tour for planning purposes			**$20.00**	

	Total cost per person			**$250.00**	

INCOME	Comments	1 Per	25 Per	50 Per	75 Per
REGISTRATION					
Full registration	*Per person*		**$200.00**	**$120.00**	**$100.00**
Single day registration	*If applicable*		$75.00	$75.00	$75.00
Meals	*Included with registration*		$0.00	$0.00	$0.00
Dorm			**$80.00**	**$80.00**	**$80.00**
Full day bus tour			**$40.00**	**$20.00**	**$15.00**
Half-day bus tour			$25.00	$15.00	$10.00
Total Income From Fees			**$8,000.00**	**$11,000.00**	**$14,625.00**
SPONSOR & DONATION					
Gifts in kind	*Pilot Printing Inc and PTA of West University*		$500.00	$500.00	$500.00
Grants	*Hammond Foundation*		$1,000.00	$1,000.00	$1,000.00
MISCELLANEOUS					
Miscellaneous income			$0.00	$0.00	$0.00
TOTAL INCOME			**$9,500.00**	**$12,500.00**	**$16,125.00**
Income per person			$380.00	$250.00	$215.00
Income per person for planning				**$250.00**	

Timeline

Timeframe		Suggested Activity

Two years before
- What city and state is the conference going to be held?
- Does it fall in the correct annual location selection cycle (Midwest – Outside Midwest)?
- Who will chair the event?
- What CSAA leadership support will volunteer or be assigned?
- Will the immediate past chair be available for support?
- What will be the conference dates?
- What is the location & proximity to transportation hubs?
- What accommodations are available (dorms and hotels)?
- Is there a cost for meeting, session and breakout rooms?
- Can sponsors for the conference be lined up?
- Is there the necessary Information Technology support for the conference at that location?
- Locate a suitable conference facility that meets conference and lodging requirements

One year before
- Notify email list from CSAA
- Add local contacts to the mailing list from city/county, university, one- room schools, etc.
- Are there sufficient resources lined up for compiling packets and contacting prospective attendees?
- Set up record keeping – master list of attendees, checks, receipts, etc.
- Who will be the registrar? Will the registrar be different from the conference chair?
- Who will handle issues, questions and problems with registration and then the whole conference?
- Who will keep track of income and expenses for the event?
- Is there sufficient staff for registration process?
- What will the cost be for meals? Breakfast, Lunch, Dinner?
- What meals are provided for what days? Where will the meals be served?
- How and what style? Buffet, Cafeteria, Banquet?
- What meals will participants be responsible for on their own? Sun, Mon, Tues, Wed?
- What restaurants are available? Distance, Cost?
- Develop theme for conference (if applicable).
- Start to organize the content & scheduling of the conference; contact & organize presenters, plan workshops and tours; also identify and include local and timely presenters and workshops
- What schools (and other locations) will be on the field trip? Who are the contacts for each location?
- Speaker request for papers (RFP) prepared and distributed. Who will write it up? When?
- Gather price quotes and create a conference budget for local arrangements
- Create and utilize a filing system for receipts, records and correspondence, including registration information and checks, cash and charge cards

9 months before	• Work all local arrangements and details with responsible parties
	• Equipment available for conference use? Tables, cloths, chairs, easel, water, cups, snacks, etc.
	• Needed for the speakers and presenters? Podium, viewgraph, computer, video, sound system, etc
	• Is there knowledgeable staff for adjustments to the items mentioned above?
	• Is there a business center for computer connection at the conference site? If not, where?
	• Is there wireless available for the sessions? Does it need a password? What is the password?
	• Is there wireless (or wired) available in the dorms? Does it need a password? What is the password?
	• Is there a printing capability for presenters (handouts) at the conference site? If not where?
	• Rooms and equipment for special displays, chart presentations and craft sessions? Tables, easel, electricity, etc
	• Select and setup conference meal and break arrangements
	• Arrange and coordinate any social functions (local site visits, receptions, video, etc)
	• Schoolhouse Tour - what additional arrangements need to be made for the sites (if necessary)?
	• Will there be a donation to (or from) that site from/to the CSAA? If so, how much?
	• Acquire backup/emergency (contact) name and phone numbers for each tour site?
	• Layout time schedule for bus trip and ensure trip is comfortable for attendees.
	• Ensure trip is "accessible" for all attendees or notify what is not accessible.
	• Communicate with each site over the months to ensure a good working relationship.
	• Are there gift shops at any of the schools? Communicate this information to attendees.
	• Restroom facilities at stops or on the bus? Communicate this information to attendees.
	• Refreshments available? On the bus? Along the way?
	• If schoolhouse tour is longer than 6 hours, you may offer a half-day trip to accommodate more attendees.
	• Line up most cost effective transportation method (commercial, private or university) for field trip
6 months before	• What parking is available at the dorms? Where located, stickers needed, tags or limited access?
	• Is there limited access (gated) parking for the conference? Where located, times, stickers or tags?
	• Is there reserved parking that should or SHOULD NOT be used? Where located, when, times, access?
	• Is handicapped parking available? Where located, stickers, tags availability
	• Recruit volunteers, set up registration process and location
	• Be the vendor and/or site support contact (or designate one) to handle the food, AV and other site specific needs and concerns before and during the conference.
	• Who is going to do the goodie bags? Is there a cost involved or donations?
	• Collect and prepare materials for welcome bags/packet (goodie bag)- try to include a pocket folder, note pads/writing paper, pens or other local advertising give a ways.
	• Acquire name tags for each participant.
3 months before	• Registration process: (US Mail and online registration)
	• Goodie bags - continue to acquire local items, brochures, CSAA logo items
	• Written directions and maps to initial registration location and times should be prepared for attendees.
	• Describe the food availability to attendees in correspondence. Where, when and cost.
	• Create and distribute press releases.
	• Provide hotel and dorm information and directions for the conference packet and correspondence
	• Provide preliminary program draft to the CSAA board
	• Arrange for the procuring, printing & preparation of the final conference registration packet.
	• Arrange for volunteers to serve as registration desk hosts.
	• Gather audio visual needs from presenters and arrange for AV equipment
	• Create Email and US Mail conference reminder for use 10 days prior to end of "early registration"
1 month before	• Written directions, maps to dorms, classrooms, and conference activities in registration package.
	• Provide outdoor "welcome" signage directing attendees to parking AND registration location.

- Will there be greeters or guides to answer questions or concerns?
- What doors will be open for registration? What times? Communicate this to attendees.
- Email a preliminary copy of the full program packet to the registrants.
- Have the CSAA web site manager put the final program on line and print final copies for distribution at the conference

2 weeks before
- Contact each site on the bus tour again to ensure good communications.
- See if the bus tour sites need any last minute items taken care of.
- Try to include a list of participants and speakers with pertinent contact information in the final packet given to participants.
- Include a thank-you note to all support individuals, volunteers and speakers when participants arrive (or at the end).

1 day before
- Contact each site on the bus tour again to ensure good communications.
- Give a copy of conference records to the Treasurer and the Secretary
- Set up registration table and session rooms etc…
- Attend the board of directors meeting held prior to the conference
- Provide, coordinate and oversee volunteers for the set-up and tear-down of various areas, creating, posting and changing signs, running errands and setting up AV equipment
- Submit all unpaid bills to CSAA Treasurer
- Submit final comments, reviews and recommendations to the CSAA board