

CONFERENCE PLANNING TOOLKIT





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Conference History

Held Annually (Typically in September and October)

- Pre-Conference Intensive Workshops on Sunday
- Conference—Sunday Afternoon to Wednesday Morning
- 300–600 Attendees

Prior Conference Locations

Date	Location	Conference Hotel	Full Registrations	Total Conference
2000	Biloxi, MS	Beau Rivage	360	
2001	Myrtle Beach, SC	Wyndham Resort	400	
2002	Lexington, KY	Hyatt Regency	412	
2003	Gatlinburg, TN	Glenstone	550	
2004	Research Triangle Park, NC	Sheraton	378	
2005	Orange Beach, AL	Perdido Beach Resort	350	
2006	Orlando, FL	Rosen Centre	250	
2007	Savannah, GA	Hyatt Regency Hotel	500	
2008	Biloxi, MS	Beau Rivage	313	
2009	Charleston, SC	Francis Marion	298	
2010	Louisville, KY	Galt House	544	
2011	Memphis, TN	The Peabody Hotel	454	589
2012	Asheville, NC	Grove Park Inn	491	543
2013	Orange Beach, AL	Perdido Beach Resort	380	404
2014	Amelia Island, FL	Omni Amelia Island	409	430
2015	Savannah, GA	Marriott Riverfront	362	380
2016	Biloxi, MS	Beau Rivage	383	400
2017	Greenville, SC	Hyatt		
2018	Louisville, KY	Marriott		
2019	Nashville	Gaylord Opryland		
2020	Asheville, NC	Grove Park Inn		

Conference History, continued

Prior Conference Room Nights—Conference Hotel

Date	Location	Friday	Saturday	Sunday	Monday	Tuesday
2008	MS	23	95	277	279	232
2009	SC	42	155	275	270	213
2010	KY	25	106	458	418	338
2011	TN	33	118	351	351	327
2012	NC	51	148	396	388	343
2013	AL		158	402	404	370
2014	FL	36	161	351	352	300
2015	GA					
2016	MS					
2017	SC					
2018	KY					
2019	TN					
2020	NC					

Conference Objectives

- Provide forum to exchange/receive industry-related information.
- Create opportunity for SE4A members, professionals and interested citizens to gather and share information on aging and related fields.
- Promote networking to facilitate cooperative relationships among the aging networks, other public agencies and private-sector organizations.
- Create awareness of SE4A and AAA organizations throughout the Southeast.
- Improve the capacity of members to better serve and represent older persons and persons with disabilities through information, education and training.
- Support SE4A’s objectives.

SE4A Organizational Structure

Board of Directors

The Board of Directors shall consist of three delegates and one alternate from each state. The Board shall meet no less than twice each year and are responsible for:

- Formulating and approving organizational policy which has been approved by the Executive Committee
- Conducting and transacting the business of the organization
- Working together as a team to help guide the organization in a positive and progressive manner
- Insuring that the operation of the organization is legal and financially sound at all times

Executive Committee

SE4A membership elects its officers on an annual basis. The SE4A By-laws state that there will be one representative from each state on the Executive Committee.

Executive Committee consists of:

President	Treasurer
1st Vice President	Past President
2nd Vice President	At-Large
Secretary	At-Large

Committees

SE4A has nine standing committees, in addition to the Executive Committee, to implement the work of the Association. These committees meet quarterly and work via telephone and email between meetings. The standing committees are:

Program—Priority task is implementation of the Annual Training Conference

Awards/Election—Primary task is oversight of the annual awards, and officers and Board

By-laws/Resolutions/Procedures—Primary task is revision of By-laws and Policies, and oversight of the resolution process

Legislative/Advocacy—Primary task is to educate membership about key legislative issues

Membership—Primary task is annual membership drive and member services

Budget—Primary task is the oversight of financial accountability of the Association

Website and Technology—Primary task is to update and maintain the SE4A website

SE4A University—Primary task is to create revenue-generating educational opportunities for individuals working in the aging field

Communications—Primary task is to distribute information to SE4A members through a variety of media

Conference-Planning Timeline

April–August (Three–Four Years Prior to Conference)

- Confirm Committee Chairs (registration, program, logistics, exhibits/sponsors, meals/refreshments, entertainment, publicity, hospitality, door prizes/goody bags, decorations)
- Decide on conference theme
- Decide on workshop tracks
- Create list of names and contact information of potential sponsors
- Begin one-on-one contact of potential sponsors
- Discuss Sunday intensives
- Discuss General Session speakers
- Prepare Save-the-Date announcement for conference (electronic and/or postal)

January (Two Years Prior to Conference)

- Confirm conference hotel—SE4A Board meeting at host hotel

April

- Sign hotel contract

Sept–October (Year Prior to Conference)

- Conference Committee meeting
- Meals/Refreshments Committee update
- Sponsorship levels confirmed and discussion of potential sponsors
- Complete workshop submission form to distribute to SE4A Board
- Contact potential workshop and plenary speakers
- Confirm Board dinner and gift
- Discuss and confirm conference entertainment for Tuesday night
- Discuss optional trips
- Discuss publicity
- Discuss hospitality, door prizes and goody bags
- Date-saver notice prepared and ready for use
- Attend SE4A conference in current state

November

- Conference Committee meeting
- Continue to contact potential workshop and plenary speakers
- Update on sponsors

Conference-Planning Timeline, continued

November (Year Prior to Conference Date, continued)

- Prepare sponsor booklet and sponsorship letter
- Discuss audio/visual needs
- Discuss signage for conference and workshops
- Decorations Committee ideas
- Discuss door prizes

December

- Conference Committee meeting
- Discussion of scholarships
- Conference budget discussion

January (Year of Conference)

- Conference Committee meeting
- Mail sponsorship and exhibitor booklet to potential sponsors
- Develop marketing plan for conference
- Review registration form for scholarship requests, if applicable
- Discuss conference registration bags
- Discuss and confirm Continuing Education plan (CEUs)
- General attendance certificate
- Confirm plans for extracurricular activities
- Plan silent auction, if applicable
- Draft letter to confirm exhibitors and sponsors
- Continue work on sponsors and exhibitors
- Draft letter to confirm general session speakers and workshop presenters
- Test sign-up/registration program
- Status report from all committees

February

- Conference Committee meeting
- Work with SE4A Program Committee to confirm workshops from the other states
- Mock-up of registration brochures
- Continue work on sponsors and exhibitors (mail or email confirmation letters)

Conference-Planning Timeline, continued

February (continued)

- Special events and activities finalized
- Entertainment finalized
- Status report from all committees

March

- Conference Committee meeting
- Final arrangements for program (intensives/workshops/general sessions)
- Layout of brochure completed
- Follow-up calls to potential and confirmed sponsors/exhibitors as necessary
- Set up registration database
- PSAs to organizations/media
- Confirm meals, space, etc. with hotel
- Status report from all committees

April–May

- Conference Committee meeting
- Review registration brochure/final edit
- Send registration brochure to printer
- Mail out registration brochure late May
- Solicit door prizes
- Finalize decorations, table arrangements, etc.
- Finalize all logistics, including audio/visual needs

June

- Conference Committee meeting
- Sponsors and exhibitors finalized
- Develop evaluation forms and copy
- Select workshop moderators
- Decide who will do welcomes and other special greetings and invite
- Workshop sessions assigned to rooms
- Complete conference program
- Conference program to printer—allow six weeks

Conference-Planning Timeline, continued

July

- SE4A Board meeting (update/issue copies of registration)
- Conference Committee meeting
- Handouts and A/V requests due
- Confirmation to exhibitors with details
- Purchase speaker gifts
- Continue planning for table decorations, favors
- Continue to solicit door prizes
- Finalize workshop moderators
- Work with hotel to finalize meals, refreshments, space, etc.
- Develop signage
- Invitations to special funders/mayor/dignitaries/decision-makers

August

- Conference Committee meeting
- Copy handouts, if necessary
- Continue to work with hotel on all arrangements
- Finalize registration list
- Finalize Continuing Education (CEUs), if applicable
- Check with speakers about any last-minute needs
- Run name tags and alphabetize for registration
- Participant packets assembled
- Develop packet instructions for moderators
- Arrange for media coverage

September

- Conference time
- Complete registration packets, moderator packets
- All committees review status

Conference-Planning Timeline, continued

October

(Post-Conference)

- Thank-you notes to funders, exhibitors, moderators, special guests, door-prize donators, etc.
- Thank-you notes to speakers with evaluation of their presentation
- Compile conference evaluations
- CEU forms processed, if applicable
- Speaker reimbursements
- Pay all bills
- Finalize expenses and revenue

January

- Final conference report to SE4A Board (Use template on page 42 of this Toolkit)

Hotel Contract

The following should be addressed/considered:

1. Dates available
2. One room rate for singles, doubles, triples, or quadruples
3. Prices for refreshment breaks, and for continental breakfasts
4. Sample luncheon and dinner menus and prices
5. Sample menus and prices for the reception
6. Meeting-room rental fees
7. Audio/visual equipment: complimentary and/or rental prices. Ask presenters to bring their own AV.
8. Concessions: What is the hotel offering the group? (e.g. complimentary suite/room for conference hospitality suite, complimentary suite for SE4A President, complimentary rooms for speakers, upgrades for board members.)
9. Exhibit-space cost and what is included in the cost. How many exhibitors will the space hold?
10. Accessibility for adults with disabilities, including hearing-impaired
11. Location for lockable office/storage room and first-aid station
12. Parking rate for conference participants (if required and applicable)
13. Brief plan to address Board meeting needs/requests
14. Transportation accessibility from airport to hotel and projected rates
15. Room block based on history—do not set the room block too high, you can increase it as the time gets closer—and overflow hotel arrangements
16. Attrition clause
17. Minimum catering charges
18. Procedures for getting approved for a master account
19. Availability of restaurants close to the hotel
20. Hotel site to be approved by Board prior to signed contract, usually two years out

Conference Host State and Partnering Agency Requirements

1. The Conference Host State Committee must determine if they will host the conference on their own or Partner with another agency.
2. If the Host State Committee chooses to host the conference on their own, they must indicate if they are exercising the option to retain a portion of the profits, and to whom those proceeds would go.
3. If the Host State Committee chooses to Partner, an Agreement must be written identifying responsibilities and the percentage of profit (or losses) shared by each group.
4. The SE4A Board has the responsibility to carefully review and approve the conditions of the agreement between the Host State Committee and the Partner agency.
5. The Conference Host State Committee has the option to retain 25% of any profits after reimbursement of the Cash Advance, payment of all expenses, and payment to SE4A of the first \$15,000 profits. (This applies only if the Committee does not have a Partner.)
6. The Conference Host Committee who exercises the option to Partner will not have the option of the 25% profit. However, the Agreement between the Conference Host State and the Partner must specifically address the repayment of the Cash Advance, payment of conference expenses, the first \$15,000 in profit to SE4A and how any remaining profits will be split between the Partner and SE4A. (Percentage split to the Partner agency not to exceed 35%.)
7. SE4A will cover any losses from implementation of the conference, except in the case of the Conference Host State Committee Partnering with another organization. If the Host State Committee Partners, the percentage of profit split between SE4A and the Partner will apply to any losses.
8. SE4A will write a check to the organization designated to receive the Host State Committee's 25% share of the profit after receipt of the final financial report and proceeds.
9. If the Host State Committee has a Partner, after Cash Advance reimbursed to SE4A, all expenses and revenues balance, SE4A receives \$15,000, the final financial report has been approved by SE4A; the remaining profit is submitted to SE4A. SE4A will be responsible for dispersing to the Partner Agency its percentage portion of the remaining project (not to exceed 35%.)



Committee Responsibilities

Conference Committee Chairperson..... XX

Registration Committee.....

Program Committee.....

Entertainment Committee.....

Sponsorship/Exhibits Committee

Transportation Committee

Logistics Committee.....

Publicity Committee

Meals/Refreshments Committee

Hospitality Committee

Door Prizes/Goody Bags Committee

Decorations Committee.....

Conference Committee Chairperson

Name:

Responsibilities:

1. Responsible for contract and relationship with the conference hotel.
2. Manages Committee Chairs to ensure progress is being made.
3. Interfaces with SE4A Consultant.
4. Assumes responsibility for overall conference planning.
5. Develops a budget and transmits to Conference and Program Chairs.
6. Keeps a file on all activities to be given to the next state at end of conference.
7. Works with all other Committee Chairs to determine conference registration fee.
8. Works with Committee Chairs to determine budgets.
9. Arranges weekly conference calls with other AAAs, as needed.
10. Makes sure information from the current conference is collected and shared with the next state.
11. Coordinates with next state for transfer of materials, to include the state flags/poles, printer, ribbons, tickets, name tags, etc.
12. Coordinates with Consultant and Committee Chairs, communicating clear roles and responsibilities.

Registration Committee

Chair:

Members:

Responsibilities:

1. Sends out date-saver postcards (See Publicity Committee for development of the save-the-date cards).
2. Arranges with hotel for room-reservation cards or forms to be included in announcement/registration packet, including availability of handicapped-accessible rooms.
3. Secures up-to-date email lists from state agencies, AAAs, and other organizations as appropriate. (Be sure to include center directors and adult day directors.)
4. Works with other Committee Chairs to develop copy on outstanding highlights, entertainment, special events, etc. for the announcement/registration brochure.
5. Works with Transportation Committee to secure information on both air and ground transportation for packet.
6. Establishes cut-off date for mail-in registrations and develops a refund and cancellation policy. (May want to establish a fee for administration if canceled after a certain date. May also want to establish a late or onsite registration fee slightly higher than regular registration fee.)
7. Mails out registration brochures.
8. Arranges for individuals to be able to register on the website.
9. Establishes system for tracking and accounting for registrations received, including depositing revenues in the conference account.
10. Sends acknowledgement of registrations received.
11. Arranges for staff and volunteers for onsite registration. Establishes times that registration desk will be open. Transmits to Program Committee for inclusion in final program.
12. Arranges to secure portfolios or durable bags for registration materials, name tags, tickets, program, maps, local establishments, etc.
13. Collects materials for registration packet. Assembles packet.
14. Arranges for "Message Board" in the registration area.
15. Keeps track of total registrations for each meal function and transmit to Meals Committee Chair.
16. Develops a method to determine the state having the highest overall conference attendance.
19. Ribbons (different colors) for Host State (AAA Staff), Presenters, SE4A Board Members, SE4A Officers, Exhibitors, Past Presidents.
20. Name tags for all participants. (Works with Publicity Committee to incorporate conference logo on the name tags.)

Entertainment Committee

Chair:

Members:

Responsibilities:

1. Plans Board dinner/event. Works with Meals Committee.
2. Entertainment for Sunday opening reception.
3. Entertainment for conference event (e.g. dance, beach party, etc.).
4. Entertainment for awards luncheon (short), if appropriate and time-permitting.
5. Develops a written contract with the entertainers for each of the above, including times and length of performances, as well as costs.
6. Works with Logistics Committee to arrange for appropriate stage set-ups, hook-ups, special equipment, etc.
7. Optional activities for participants
 - Special Attractions
 - Shopping
 - Other
8. Develops entertainment budget and transmits to Conference and Program Committee Chairs as soon as possible.
9. Writes up information on the entertainment secured for registration packet.

Sponsorship/Exhibits Committee

Chair:

Members:

Responsibilities:

1. Identifies/develops list of potential sponsors and exhibitors, building on prior years' conferences.
2. Determines sponsorship and exhibitor "levels".
3. Develops a letter and/or brochure soliciting sponsors and exhibitions, and mails out as early in the year as possible.
4. Solicits sponsors and exhibitors.
5. Determines area and number of exhibit spaces available.
6. Establishes fees and determines specifically what we will provide for fees, and develop levels of sponsorship.
7. Draws up simple contract form outlining above details.
8. Determines what will be provided to encourage conferees to view exhibits. Coordinates with Door Prize Committee. For example:
 - Breaks taken in exhibit hall
 - Major door prizes and how winners will be determined
 - Extra reception in exhibit hall
 - Exhibitors donating door prizes for exhibit area
9. Serves as contact for all exhibitors and sponsors.
10. Assigns exhibitors to specific spaces.
11. Works with Logistics Committee to arrange for all hook-ups, curtains, chairs, etc., for exhibitors. Be available to assist exhibitors in setting up.
12. Determines hours exhibit hall will be open and transmits information to Program Committee for inclusion in printed program
13. Arranges for security.
14. Coordinates major sponsors with other committees.
15. Develops a budget of anticipated revenues and expenses as soon as possible and transmits information to Program Committee and Conference Committee Chairs.
16. Maintains list of sponsors and exhibitors, to include contact information and levels to share with the next state.
17. Sends thank you notes to sponsors and exhibitors after the conference and let them know the information for the next conference .
18. Consider multi-year agreements.

Transportation Committee

Chair:

Members:

Responsibilities:

1. Determines official airlines or travel agency for conference. What kind of discounts will they offer? Will they provide a free ticket for door prize, etc.
2. Identifies costs of ground transportation from airport, including shuttles and cabs.
3. Identifies cost of hotel parking.
4. Transmits above information to Publicity Committee for inclusion in printed program.
5. Develops schedules for dignitaries' arrivals and departures, and arranges for people to be available at those times for transportation assistance.
6. Is public transportation available? Type? Cost? Provides schedules for packets.
7. Arranges for transportation if any part of conference is offsite.
8. Arranges with hotel for shuttle for shopping, entertainment, etc.
9. Develops a budget and transmits to Conference Chairs as soon as possible.
10. Keeps a file on committee activities to be submitted to next state at end of conference.

Logistics Committee

Chair:

Members:

Responsibilities:

1. Works with Conference Chair to communicate as a second primary contact with the hotel.
2. Arranges with hotel for times and meeting space for all functions—plenary sessions, workshops, meals, reception, Board meeting, registration, exhibits, etc.
3. Works with Program Committee to assign specific rooms for each function, including workshops.
4. Arranges for a secure place to store special equipment, door prizes, etc.
5. Works with Program Committee to determine room set-ups and makes arrangements for room set-ups for all functions (e.g. classroom style, rounds, etc.), including head table.
6. Arranges for all audio/visual and other equipment needed for each session and/or workshop. Has someone assigned to check each room just prior to session.
7. Makes arrangements for any special needs:
 - Suite for SE4A Chair
 - Suite for Hospitality Room
 - Other
8. Keeps track of complimentary rooms available and works with Program Committee to use complimentary rooms for speakers for whom we are paying expenses.
9. Works with Publicity Committee to have printed directional signs for registration, exhibits, and main functions.
10. Has printed signs with names of each session and workshop placed outside the door to each session.
11. Assigns staff to place and changes signs as needed.
12. Develops a budget and transmit to Program and Conference Committee Chairs as soon as possible.

Publicity Committee

Chair:

Members:

Responsibilities:

1. Works closely with Program and Registration Committees.
2. Produces date-saver cards printed with pertinent conference information.
3. Works with Registration Committee to decide who mails date-saver cards.
4. Develops and sends information regarding conference to other organizations who have newsletters with conference calendars, etc.
 - Aging Network News
 - Older Americans Report
 - Universities
 - N4A
 - NCOA
 - Southern Gerontology Society
 - State Aging Associations
 - Other
5. Develops news releases for media.
6. Develops final program, including information from all other Committees, to be included in packet.
7. Develops format for final program.
8. Arranges for printing of final programs and getting them to the Registration Committee.
9. Works with Logistics and Program Committees to develop workshop room signage.
10. Works with Sponsor and Logistics Committees to develop and place sponsorship signs.
11. Any other activities to help promote attendance at conference.
12. Develops a budget to be submitted to Conference Chair.
13. Keeps a file on Committee activities to be submitted to the next state at end of conference.

Meals/Refreshments Committee

Chair:

Members:

Responsibilities:

1. Plan each meal function—Board dinner, opening reception, awards lunch, and closing breakfast—as well as any other continental meals.
2. Make sure you have enough food, especially at receptions. Make sure you have non-meat and non-pork product alternatives, taking into consideration vegetarians/vegans and people who keep Kosher or Halal.
3. Plan refreshments for breaks and determine location for set up.
4. Tickets for each special function: determine how they will be collected and by whom. Determine drink tickets at special functions.
5. Determine cost for each function, including breaks.
6. Copy of costs and total budget to Conference Chair and Program Committee Chair. Complete budget as soon as possible.
7. Keep track of number of participants for each meal function and report to catering manager on a timely basis. (Work with Registration Committee.)
8. Work with Door Prize Committee on ticket numbers or system for drawing.
9. Work with Sponsorship Committee to obtain sponsors for any of above.

Hospitality Committee

Chair:

Members:

Responsibilities:

1. Arrange for, and set up, Hospitality Suite.
2. Establish hours that Suite is open, which should be printed in program.
3. Arrange for staffing of Suite at all times.
4. Arrange for refreshments and snacks.
5. Get cups, plates, napkins, etc.
6. Work with Sponsorship Committee to have room and refreshments sponsored to cover costs.

Door Prizes, Conference Bags & Decorations Committee

Chair:

Members:

Responsibilities:

1. Determine distribution of door prizes. Try to incorporate exhibit hall to drive attendees to visit exhibitors.
2. Obtain door prizes. This may be from exhibitors/sponsors, each AAA in your state, or independently solicited. It is preferable that these be valued at no less than \$25.00.
3. Obtain items to put in the conference bags.
4. Work with Registration and Sponsorship Committees to have conference bags for registrants, have them sponsored (with sponsor on the bag) and stuffed with items.
5. Head table decorations for awards lunch, opening session and closing breakfast.
6. If centerpieces are “giveaways”, determine how to distribute.
7. Other decorations for receptions and dinner/dance/party, etc.
8. Develop budget.

Sponsor, Exhibit and Advertising Income

Conference expenses are paid with funds from registration, sponsorship, advertising, and the exhibits. Suggested levels are found below.

Sponsorship Levels

\$10,000

\$7,500

\$5,000

\$2,500

Advertisement Opportunities

Full Page \$600

Half-Page \$300

Quarter-Page \$150

Inside Front Cover \$1,000

Inside Back Cover \$1,000

Exhibits

Non-Profit \$500

For-Profit \$600

Registration

Minimum goal of ____ attendees @ \$ ____ registration fee

One-day registration fees

Intensive fees

Update at the end of each conference.

Credit Card Processing and Guidelines

- We accept all major credit cards for conference registration, paying for exhibit space at the conference and paying for sponsorships. Sponsors who are paying more than \$1,000 are requested to pay by check because the credit-card processing fees run between 4–7%. These fees add up quickly when sponsorships are \$5K, \$10K, or \$25K!
- American Express settles to the SE4A Operating Account and the other credit cards settle to the SE4A Conference Account .
- American Express manages their own processing and we have an agreement with Authorize.Net to manage processing for the other credit-card companies.
- We track all credit-card payments through Cvent (conference registration software) and our contractor, Nina Walters, manages this system for SE4A .
- Prior to the annual conference, we reconcile what is posted in Cvent with the postings in the Operating and Conference accounts and transfer funds from one or both accounts to the Conference Host Committee as needed.
- The Treasurer always leaves about \$1,000 in the Conference Account after this pre-conference transfer to assure that funds are available in the event the processing company posts expenses to this account.
- Note: The postings to the Operating and Conference Accounts include the 4–7% processing fees so the actual balance that is settled to these accounts is lower than the amount posted to Cvent because the amount posted in Cvent does not include processing costs.

Sample Budget Overview

Expenses

Meals/Refreshments/Breaks \$ 88,600

	Saturday	Sunday	Monday	Tuesday	Wednesday
Board Dinner	\$4,000				
Board Breakfast	\$ 600				
Board Lunch	\$1,000				
Reception		\$25,000			
Breakfast plus am/pm Breaks			\$ 8,000	\$ 8,000	\$11,000
Luncheon			\$25,000		
Beverage Tickets				\$ 6,000	
Totals	\$5,600	\$25,000	\$33,000	\$14,000	\$11,000

Tuesday-Night Function \$25,000

Meals	\$20,000
Miscellaneous	\$ 5,000

Program \$47,000

General Sessions/Motivational	\$10,000				
Class Speakers	\$10,000				
Intensives	\$ 2,000				
Entertainer	\$ 5,000				
Audio/Visual Equipment	\$ 20,000				

Conference Bags/Speaker Bags/Gifts/Printing \$9,000

Conference Bags/Speaker Bags/Gifts	\$5,000
Conference Registration/Program	\$4,000

Sample Budget Overview, continued

Exhibitors \$5,000

Booths	\$4,000
Exhibitor Lunches	\$1,000

Goody Bags/Door Prizes \$3,000

Bag with Imprint	\$3,000
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Decorations \$3,500

Centerpieces	
Place Cards	
Tablescapes: Awards Luncheon and Floral	
Tablescapes: Gala Affairs and Floral	
Hospitality Suite	
General Session	
Closing Breakfast	

Hospitality \$2,000

Supplies, Beer/Wine, Suite, Napkins, Cups	\$2,000
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Registration/Signs \$3,000

Ribbons	
Labels for Save-the-Date	
Mail Costs	
Name Badges	
General Session/Workshop Signs	

\$188,100 TOTAL BUDGET



Sample Speaker Contract

SE4A
and

I, _____, agree to present the Keynote Address for the SE4A Annual Conference, scheduled for _____ (date) at _____ (time) at the _____ (venue) for the following fee/expenses:

- Keynote Address Fee = \$ _____ (Topic: _____)
- Round-trip mileage from _____ to _____ = _____ miles round trip at \$ _____ /mile for total mileage expenses of \$ _____.
- Hotel accommodations at the _____ (venue) for one (1) night on _____ (date), to billed directly to _____ (organization).
- Total Expenses, Excluding Hotel = \$ _____

I understand that, upon the SE4A's approval, I will be given a check for \$ _____ on _____ (date).

Signature

Date

Speaker Name:
Street Address:
City, State Zip:
Phone Number:
SSN or Fed ID# :

Approval Signature

Date

Organization Name:
Street Address:
City, State Zip:
Phone Number:



Proposal Submission Form

Title of Presentation: _____

Please list three or four learning objectives for the session:

Format for Session:

- Intensive
- Workshop
- Panel Discussion

Track for which Session will best be suited:

- Education/Professional Development
- Senior Centers (Including Wellness)
- Consumer/Client Choice (Including ADRC models)
- Health & Long-Term Care
- Caregiving
- Elder Rights/Justice
- Communities Preparing for the Future
- Information/Referral/Assistance

Sessions will be 1 hour 15 minutes in length. Program Chair reserves the right to modify time/track based on availability in the schedule.

Briefly (75–100 words) describe the proposed session:



Proposal Submission Form, continued

Presenter 1: _____
 Title/Agency: _____
 Address: _____
 Phone Number: _____
 Email Address: _____

Presenter 2: _____
 Title/Agency: _____
 Address: _____
 Phone Number: _____
 Email Address: _____

Presenter’s Qualifications:

Please attach a copy of your résumé to this form. Below, please describe experiences and training that uniquely qualify you to participate in the proposed presentation. This information is required for CEU approval.

Presenter 1:

Presenter 2:

Will you be providing your own A/V equipment? Yes No

Please describe the type of connections you will need for your presentation.

If you are unable to provide your own equipment, please describe your requirements.

Proposal Submission Forms are due by _____. Submit completed form to _____.

Workshop Information Checklist

Workshop: _____ Intensive: _____

_____ Workshop Title

_____ Workshop Description

_____ Presenters

_____ Name

_____ Position

_____ Agency

_____ Location

_____ Telephone

_____ A/V Order

_____ Primary Contact

_____ Name

_____ Telephone

Claimed Expenses

_____ Yes

_____ No

Requested Room

_____ Yes

_____ No

Bio/Resume

_____ Yes

_____ No



Workshop Moderators

Please complete this form if you will volunteer to moderate a workshop session. If you have a preference as to time/date/workshop, please specify. We will try to accommodate your requests, but make no promises.

Moderator Information

Name: _____

Agency: _____

Phone: _____

Fax: _____

Email: _____

Preference: _____

Moderator Instructions

Thanks so much for helping out as a Moderator! You will play an important role in assisting presenters and attendees to feel comfortable and keeping the day on schedule.

The Essential Responsibilities of a Moderator:

1. Sign out the Moderator Packet(s) for your workshop from the Conference Registration Desk **no less than thirty (30) minutes prior to the workshop start time.**
2. Familiarize yourself with the presenter bio(s) in the packets.
3. Introduce yourself to each presenter and agree to a visual cue to indicate when time is running out for the session, or you can use the enclosed time cards to indicate 10 minutes and 5 minutes.
4. Place their tent card(s) at the head table.
5. Start the session on time.
6. Introduce each of the presenters, using the bios provided.
7. **If your workshop is sponsored, please be sure to acknowledge the Sponsor's support of the Conference before the presentation begins.** (If the workshop is sponsored, the Sponsor information will be included in your workshop information sheet.)
8. Coordinate the flow (speaking order) of the workshop with the presenters.
9. When you feel that everyone who plans to attend has arrived, record the number of attendees on the label outside of the packet (approximately 15 minutes after the workshop starts).
10. Keep the Conference running smoothly by making sure that the **workshop ends on time.**
11. Return the Moderator Packet to the Registration Desk.

General Conference Schedule

Saturday

- 9:00 – 3:00 SE4A Board Meeting
- 2:00 – 5:00 Registration

Sunday

- 9:00 – 12:00 Pre-Conference Intensive Sessions
- 3:30 – 5:30 Opening Session
 - Set-up should be theater-style
 - Sound system available
 - Head Table includes: SE4A President; Conference Chair; whoever is doing welcoming remarks such as State Director, Local Mayor; Performer to sing National Anthem; Keynote Speaker; Sponsor
 - State flags displayed on the stage
 - Flow for the opening: SE4A President will welcome everyone to the conference and introduce the Head Table, President will allow for a moment of silent reflection, President will announce the Presentation of the Flag and lead the Pledge of Allegiance, President will call on performer to sing the National Anthem, President will introduce individual(s) who will provide an official welcome, President will introduce the keynote speaker, Conference Chair will conclude with update on program.
- 5:30 – 7:30 Reception (Exhibit Area)
- 7:30 – 9:00 Hospitality Suite

Monday

- 7:15 – 8:15 Continental Breakfast (Exhibit Area)
- 8:30 – 9:45 General Session (Current SE4A Officers are seated at the Head Table, along with Conference Chair and Keynote Speaker as well as Sponsor. The SE4A President welcomes everyone to the Conference and introduces the speaker and/or speakers. Conference Chair will conclude with update on program.)
- 10:00 – 11:15 Workshop I
- 11:30 – 1:30 SE4A Awards Luncheon (Consider if you plan to have a speaker during Awards Luncheon. Reserve tables for Past Presidents, Award Winners. Include the Awards/Election Committee Chair to be seated at Head Table. Obtain a photographer for Awards Luncheon.)
- 1:45 – 3:00 Workshop II

General Conference Schedule, continued

Monday, continued

3:00 – 3:30	Break (Exhibit Hall)
3:45 – 5:00	Workshop III
5:00 – 6:00	Break in Exhibit Hall and Door Prizes (optional)
6:00	Open Evening
8:00 – 10:00	Hospitality Suite

Tuesday

7:15 – 8:15	Continental Breakfast (Exhibit Hall)
8:30 – 10:00	General Session: SE4A President, Conference Chair, Speaker(s), Sponsor are seated at the Head Table. Speakers for this session may be AoA/ACL, N4A and/or other national speakers. SE4A President will welcome everyone and introduce keynote speaker/speakers. Conference Chair will conclude with update on the program.
10:15 – 11:30	Workshop IV
11:45 – 1:30	Open Lunch
2:00 – 3:15	Workshop V
3:30 – 4:45	Workshop VI
3:30 – 4:45	State Directors Meeting
6:00 – 10:00	Dinner and Dance

Wednesday

8:30 – 11:00	Closing Breakfast: Seated at the Head Table are the New SE4A Officers, Sponsor, Conference Chair, Keynote Speaker <ul style="list-style-type: none">• SE4A Business Meeting• Keynote Speaker• Call to Conference• Door Prizes• New SE4A Officers will be seated at the Head Table
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Award Procedures

1. SE4A presents seven annual awards to acknowledge services to older adults: Jane Kennedy Excellence in Aging, Positive Images in Aging, Public/Private Partnerships, Outstanding Community Service, Outstanding Volunteer in Aging, Aging Impact, Aging Network, and Honorary Lifetime Membership.
2. Awards/Elections Committee is responsible for all aspects of these awards.
3. A description of each award and the selection process for each award is found in the SE4A Policies and Procedures Manual.
4. Nomination forms are submitted to each AAA in April. Nomination forms must be returned to the SE4A Awards/Elections Committee Chair by the middle to end of May. Award winners are notified in writing by the Awards/Election Chair by the first of August, with a copy of the notification sent to the sponsoring AAA.
5. The sponsoring AAA will contact their award winner and determine if a representative will attend the SE4A Conference, and communicate this with the Awards/Election Chair.
6. Letter to the award winners will include instructions directing them to come to Registration upon arrival at the conference.
7. At Registration, name badge (host state is responsible) will be provided to each award recipient and a member of the Awards/Elections Committee will direct the award winner to the “reserve” table(s).
8. Host state will ensure there is a photographer to take pictures of all award winners.
9. The Jane Kennedy Excellence in Aging and the Outstanding Volunteer in Aging award winners’ photographs and information will be placed on the SE4A website at the conclusion of the conference.



Sample Letter to Award Winners (Print on SE4A letterhead)

Date _____

Award Recipient Name _____

Address 1 _____

Address 2 _____

Dear _____,

It is my pleasure to inform you that _____ has been awarded the _____ Award by the Southeastern Association of Area Agencies on Aging (SE4A).

The award will be presented at the Awards Luncheon on Monday, _____, during the SE4A Annual Training Conference. The Conference will be held at the _____, located in _____ on _____. All award recipients will be seated at a Reserved Table.

If you plan to attend the luncheon, please contact _____.

If you are able to attend the Conference, please come to the Registration Desk upon arrival and you will receive additional information about the Awards Luncheon.

Congratulations!

Regards,

Chair, SE4A Awards/Elections Committee

Cc: _____



Workshop Acceptance Letter

Date _____

Workshop Presenter Name _____

Address 1 _____

Address 2 _____

Dear _____,

Congratulations! Your workshop proposal, _____, has been selected for the SE4A Annual Conference.

The Conference is scheduled for _____ at the _____, located in _____ . Your session is scheduled for _____ .

Enclosed is a Workshop Confirmation Form. **Please review it carefully, make any edits/corrections, and sign and return to us as soon as possible.** You can:

- Fax it to _____
- Scan and email it to _____
- Or mail it to _____

More information about the Conference itself will be sent to you separately. We look forward to hearing from you, and seeing you at the Conference!

Congratulations!

Sincerely,

Chair, SE4A Conference Program Committee



Workshop Confirmation Form

SE4A Annual Training Conference

Workshop Confirmation Form

Workshop Title:

Workshop Description:

Speaker*:

Presentation Date/Time:

Equipment Requested:

Signature of Presenter

Date

Please return to:

**If there is a second presenter, a separate form is being sent to him/her for signature.*



Workshop Rejection Letter

[Date

Workshop Presenter Name

Address 1

Address 2

Dear _____,

Thank you for submitting your Conference presentation proposal for the SE4A Annual Conference. We received an abundance of outstanding workshop proposals from which to choose. Unfortunately, as wonderful as they all were, we could not accept them all. It was a very difficult decision not to include your session, _____, at this year's Conference. Please consider resubmitting for next year's Conference, which will be held at _____.

We hope to still see you at the Conference at the _____, located in _____.
More information about the Conference itself will be shared with everyone very soon.

Thank you again for your time and interest.

Sincerely,

Chair, SE4A Conference Program Committee



Conference Evaluation

How many SE4A Annual Conferences have you attended? (Circle one) 1 2 3 4 5+

Excellent.....Adequate.....Poor
5 4 3 2 1

GENERAL SESSIONS

Sunday	_____	_____	_____	_____	_____
Monday	_____	_____	_____	_____	_____
Tuesday	_____	_____	_____	_____	_____
Wednesday	_____	_____	_____	_____	_____

EXHIBITS

_____	_____	_____	_____	_____
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SOCIAL EVENTS

Sunday	_____	_____	_____	_____	_____
Monday	_____	_____	_____	_____	_____
Tuesday	_____	_____	_____	_____	_____

OVERALL CONFERENCE

Pre-Conference Publicity	_____	_____	_____	_____	_____
Registration Procedures	_____	_____	_____	_____	_____
Overall Conference Organization	_____	_____	_____	_____	_____
Hotel Accommodations	_____	_____	_____	_____	_____
General Environment of the Conference Location	_____	_____	_____	_____	_____
Conference Schedule of Events	_____	_____	_____	_____	_____
Topics presented were relevant to my needs for education	_____	_____	_____	_____	_____
The annual conference met advertised promises	_____	_____	_____	_____	_____

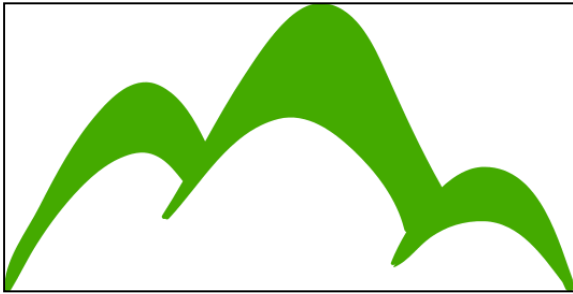
How would you rate the Conference overall?

_____	_____	_____	_____	_____
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Final Conference Report

Full Conference Registrations	_____
Total Conference Attendance	_____
Total Room Nights	
Friday	_____
Saturday	_____
Sunday	_____
Monday	_____
Tuesday	_____
Total Revenue	_____
Total Expenses	_____
Conference Proceeds to SE4A	_____
Conference Proceeds to State]	_____



CONFERENCE HOTEL

PROPOSAL



Hotel Information

The following should be addressed/considered:

1. Dates available: Mid-September or October 2019
2. One room rate for singles, doubles, triples, or quadruples
3. Prices for refreshment breaks, and for continental breakfasts
4. Sample luncheon and dinner menus and prices
5. Sample menus and prices for the reception
6. Meeting-room rental fees
7. Audio/visual equipment: complimentary and/or rental prices
8. Concessions: What is the hotel offering the group? (e.g. complimentary suite/room for conference hospitality suite, complimentary suite for SE4A President, complimentary rooms for speakers, upgrades for board members.)
9. Exhibit-space cost and what is included in the cost. How many exhibitors will the space hold?
10. Accessibility for adults with disabilities, including hearing-impaired
11. Location for lockable office/storage room and first-aid station
12. Parking rate for conference participants (if required and applicable)
13. Room for Board meeting on Saturday
14. Transportation accessibility from airport to hotel and projected rates
15. Room block based on history (Friday = 35, Saturday = 130, Sunday = 360, Monday = 352, Tuesday = 248) and overflow hotel arrangements
16. Attrition clause
17. Minimum catering charges
18. Procedures for getting approved for a master account
19. Availability of restaurants close to the hotel
20. Conference attendance averages 425 attendees.

General Conference Schedule

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- 9:00 – 3:00 SE4A Board Meeting
- 2:00 – 5:00 Registration (Space for conference registration needed Saturday–Tuesday)

Sunday

- 9:00 – 12:00 Pre-Conference Intensive Sessions (Up to 3 sessions)
- 3:30 – 5:30 Opening Session
- Set-up should be theater-style
 - Sound system available
 - Head Table includes: SE4A President; Conference Chair; whoever is doing welcoming remarks such as State Director, Local Mayor; Performer to sing National Anthem; Keynote Speaker; Sponsor
 - State flags displayed on the stage
 - Flow for the opening: SE4A President will welcome everyone to the conference and introduce the Head Table, President will allow for a moment of silent reflection, President will announce the Presentation of the Flag and lead the Pledge of Allegiance, President will call on performer to sing the National Anthem, President will introduce individual(s) who will provide an official welcome, President will introduce the keynote speaker, Conference Chair will conclude with update on program.
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Monday

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General Conference Schedule, continued

Monday, continued

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3:45 – 5:00	Workshop III (5 concurrent meeting rooms)
5:00 – 6:00	Break in Exhibit Hall and Door Prizes (optional)
6:00	Open Evening
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11:45 – 1:30	Open Lunch
2:00 – 3:15	Workshop V (5 concurrent meeting rooms)
3:30 – 4:45	Workshop VI (5 concurrent meeting rooms)
6:00 – 10:00	Dinner and Dance

Wednesday

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