

# CONFERENCE PLANNING GUIDE

---

Address:  
Alpha Phi Omega  
1441 E. 104th St., Ste. 105  
Kansas City, MO 64131

---

816.373.8667  
meetings@apo.org  
www.apo.org



# **WELCOME TO THE CONFERENCE PLANNING GUIDE**

---

Welcome to the exciting and rewarding journey of planning an Alpha Phi Omega conference! Inter-chapter events allow brothers to experience the Fraternity at a national level beyond their local chapter. The impact of bringing brothers together from different parts of the country, to form common bonds and shared experiences, is a unique opportunity available at conferences.

Planning a conference, big or small, can be a big task. This resource is available for conference planners as they venture through planning and executing a conference. This guide reviews areas of the planning process and offers tips for addressing each. Also, there is a blank conference outline that can be filled in to assist in monitoring deadlines and tracking progress along the way.

Serving as a conference planner or a member on a planning committee is a role that shows commitment to the Fraternity and the APO experience of others. The Fraternity appreciates each conference planner for their commitment to bringing irreplaceable memories and education to participants everywhere.

# TABLE OF CONTENTS

- 1. PLANNING EXPERIENCE..... 4-10
- 2. CONFERENCE OUTLINE ..... 11
- 3. PLANNING CHECKLIST..... 12
- 4. SAMPLE CONFERENCE BUDGET ..... 13
- 5. SOCIAL MEDIA TIMELINE ..... 14
- 6. CONFERENCE LEARNING OBJECTIVES.....15
- 7. SAMPLE SATURDAY SCHEDULE GRID.....16

# PLANNING EXPERIENCE

## 1. THE DETAILS

Determining the big and small details is an important first step in planning a conference. The details outline what the conference will and will not include. Details also set a road map for the rest of the planning process. Consider asking previous conference planners, officers and sectional chairs what past conferences have offered and what should be included in this year.

### GO BACK TO BASICS: WHO, WHAT, WHEN HOW?

#### WHAT IS THE PURPOSE OF THE CONFERENCE?

---

---

---

#### WHAT ARE THE GOALS?

---

---

---

---

#### WHO WILL ATTEND?

---

---

---

---

#### WHO WILL HELP PLAN?

---

---

---

---

#### WHEN WILL IT TAKE PLACE?

---

---

---

---

#### WHERE WILL IT TAKE PLACE?

---

---

---

---

#### HOW WILL IT BE MARKETED?

---

---

---

---

# PLANNING EXPERIENCE

## 2. BUDGET

It is crucial to set the conference budget early and accurately. As a best practice, the goal of a conference budget should be to break-even. This goal ensures all the costs are paid for and that registration is not overpriced. A break-even budget is one where the price is set so that the revenue earned equals the anticipated expenses of the conference.

*See the sample conference budget on-page 9 to help navigate the necessary expenses and revenues planning teams may face.*

Use the following formulas to calculate the break-even point. The calculation will help determine the revenue needed to cover the costs of the conference.

$$\frac{\$ \text{_____}}{\$ \text{_____}} - \$ \text{_____} = \text{BREAK-EVEN}$$

FIXED COSTS\*/REGISTRATION FEE — VARIABLE COSTS\*

$$\frac{\$ \text{_____} + \$ \text{_____}}{\$ \text{_____}} = \text{BREAK-EVEN REGISTRATION COST}$$

FIXED COSTS\* + VARIABLE COSTS\*/ ANTICIPATED ATTENDANCE

*\*Fixed Cost – Expense incurred regardless of the number of attendees (i.e., audio-visual)*

*\*Variable Cost – Costs that vary according to the number of attendees (i.e., food & beverage)*

# PLANNING EXPERIENCE

## 3. HOST VENUE & CONTACTS

Now that the groundwork for the conference has been laid out, it is time to start putting the pieces together. The conference venue should align with the goals and purpose of the event. For example, if networking is a goal of the event, the site should offer spaces that encourage mingling and conversations between conference attendees. Host venues can vary widely in their offerings from food and beverage to sleeping rooms be sure to tour each place before making a final selection and agreeing on a contract.

A contract should never be in the name of Alpha Phi Omega; it should always be in the name of the local organizations (chapter's) title. The entity signing the contract should be one that has proper standing to represent the organization and must be in the name of a group that has an employee identification number (EIN). An individual should not sign a contract in the representation of themselves; otherwise, the person signing the contract is personally guaranteeing the legal requirements of the contract. For this reason, a chapter representative should be signing any contract associated with a local conference.

## KNOW THE LINGO

Make sure the venue contract is in terms that are easily understood. Here are some general terms to become familiar with when dealing with hotels and conference centers.

- 1. ROOM BLOCK** – Total number of sleeping rooms at a hotel that has been set aside for a specific group
- 2. GROUP RATE** – Discounted reservation rate for sleeping rooms within the room block only available to members of that group
- 3. CUTOFF DATE** – Specific date on which the group rate expires, and the hotel will release any remaining rooms from the room block to the general public
- 4. ROOM PICKUP** – The number of sleeping rooms used by event attendees
- 5. FOOD AND BEVERAGE MINIMUM** – A specific dollar amount that the group has agreed to spend on food and beverage in exchange for complimentary use of the hotel meeting space
- 6. ATTRITION** - The difference between the actual number of sleeping rooms used and the amount initially agreed upon in the contract

# PLANNING EXPERIENCE

## 4. MARKETING

Delegating a marketing committee within the planning team is a great way to make sure that this crucial task is taken care of and managed by a skilled team. The marketing team will need to decide the goals for the team and the main messages that will be used to meet these goals. Decide on the conference's different audiences and set a plan to get information to each. Consider various media forums, design marketing collateral and set a timeline. *See page 10 for a sample social media timeline.*

## GET THE NEWS OUT

After confirming the location and date, consider sending out a save the date.

## SAMPLE EMAIL TEMPLATE

SUBJECT: ANNOUNCING THE [CITY] ALPHA PHI OMEGA SECTIONAL CONFERENCE

FROM: [SECTIONAL OR REGIONAL CHAIR]

EMAIL BODY:

# SAVE THE DATE

Brothers from all over Alpha Phi Omega's [Section Name] will be joining together for Leadership, Friendship and Service in a weekend-long conference on [Date of Conference] from [Time] at [Specific Location of Venue].

This conference will provide attendees with the opportunity to foster relationships with brothers from across the country as they immerse themselves in a weekend full of engaging education and unforgettable experiences.

**REGISTER TODAY: [REGISTRATION LINK]**

**ALPHA PHI OMEGA  
SPRING SECTIONAL CONFERENCE  
MARCH 1-3, 2020 | KANSAS CITY, MO**

# PLANNING EXPERIENCE

## 5. REGISTRATION

Establishing an effective and efficient registration form is an essential part of conference planning. A smooth and enjoyable registration process can result in higher conference attendance. Setting up a quality registration form also includes selecting the right questions to ask participants. Be sure to ask only necessary questions so that the form does not become too lengthy. Common questions include contact information, meal and dietary preference, emergency contact information, chapter affiliation and membership status.

	SOFTWARE NAME	FEES/COST STRUCTURE	NOTES
	BROWN PAPER TICKETS	\$0.99 + 5% per ticket	Revenue is mailed within seven days of the event or through PayPal processing. Additional fees may apply to PayPal.
	eventbrite	Service: 2% + \$0.79 per ticket Processing: 2.5% per payment	The fees in the table are for Eventbrite's standard package. Eventbrite also can offer a variety of ticket options and schedule them to increase as the event nears automatically. The revenue can be set up as a weekly deposit.
	PAYPAL	Processing: 2.9% + \$0.30 per payment	PayPal is only a processing service. A separate form is needed to collect registration data from attendees.
	REGFOX	\$0.99 + 2.99% per registration	Revenue takes 2-3 business days to appear in a linked chapter bank account.

# PLANNING EXPERIENCE

## 6. PROGRAMMING/SCHEDULE

Finalizing conference programming can take a considerable amount of time, be sure to start early and prioritize the importance of robust programming. Having a set schedule ahead of time will allow time to create marketing material, find presenters who are available for the conference dates and confirm room assignments with the hotel or conference center.

When selecting the individual workshops to be available at the conference, it is important to consider topics that are at the forefront of the Fraternity and serve the mission and vision. Presenters should be encouraged to elevate the education so that the learning is unique and only available at a conference or national event. *See page 11 for specific learning objectives and ideas on ways to incorporate these topics.*

## 7. POST EVENT DATA

Saving data and gathering feedback after the event is essential to the future success of the program. Data should include the number of people who attended, what workshops were well attended, and the total spent on the event. Distribute a post-event survey to collect feedback on the attendee experience to improve for future conferences. Save survey responses and share them with the next planning team.

### FIVE TIPS FOR CREATING AN EFFECTIVE SURVEY

- 1. KEEP THINGS SIMPLE AND TO THE POINT. AVOID ASKING TOO MANY QUESTIONS.**
- 2. DON'T WAIT! DISTRIBUTE THE SURVEY NO LATER THAN A WEEK AFTER THE EVENT SO THAT THE EXPERIENCE IS FRESH IN THE ATTENDEE'S MIND.**
- 3. IDENTIFY SURVEY PARTICIPANTS BY MEMBERSHIP TYPE (I.E., ALUMNI VS. STUDENT).**
- 4. WRITE QUESTIONS IN MULTIPLE-CHOICE FORMAT TO BETTER COMPARE ANSWERS AND COMPILE DATA.**
- 5. END WITH AN OPEN-ENDED QUESTION TO GATHER QUALITATIVE RESPONSES.**

# PLANNING EXPERIENCE

---

## 8. FINAL TIPS

- 1.** Merchandise orders must go through a licensed APO vendor to protect the APO trademark. Find the full list of licensed vendors [here](#). To recommend a vendor become licensed with our organization, send the company name, address, phone number, contact email and web address to [vendors@greeklicensing.com](mailto:vendors@greeklicensing.com).
  - 2.** Some hotels and conference centers require a certificate of insurance. A copy of APO's certificate is in the resource library on [www.apo.org](http://www.apo.org). Some venues require an additional insured identification on our certificate of insurance. Submit the form in the resource library to add the site as additionally insured. There is a \$250 cost to do this.
  - 3.** When contracting with an entertainment group, such as a DJ, the DJ should provide proof of their liability insurance to the group.
  - 4.** In some cases, the US state where the conference is being held may offer tax exemption to subordinates (chapters) of Alpha Phi Omega. Conference planners will need to research state policies on tax exemption for 5013c organizations and file the appropriate documents with the state. Keep in mind that a chapter's EIN and tax information will need to be used during the filing process.
  - 5.** Send additional questions or support inquiries to the meeting team at [apomeetings@apo.org](mailto:apomeetings@apo.org).
-

# CONFERENCE OUTLINE

## 1. DETAILS

DATE: \_\_\_\_\_ START TIME: \_\_\_\_\_ END TIME: \_\_\_\_\_  
 LOCATION: \_\_\_\_\_ HOST: \_\_\_\_\_  
 CONFERENCE GOALS: \_\_\_\_\_

## 2. BUDGET

ANTICIPATED FIXED COSTS = \$ \_\_\_\_\_ REGISTRATION PRICE = \$ \_\_\_\_\_  
 ANTICIPATED VARIABLE COSTS = \$ \_\_\_\_\_ ANTICIPATED REVENUE = \$ \_\_\_\_\_  
 ANTICIPATED ATTENDANCE = \_\_\_\_\_

## 3. CONTRACTS

VENUE CONTACT: \_\_\_\_\_ EMAIL: \_\_\_\_\_ PHONE #: \_\_\_\_\_  
 CANCELLATION POLICY: \_\_\_\_\_  
 FOOD & BEVERAGE MINIMUM: \_\_\_\_\_ MENU DUE DATE: \_\_\_\_\_  
 ROOM BLOCK DETAILS: \_\_\_\_\_ CUT-OFF DATE: \_\_\_\_\_

## 4. REGISTRATION

STUDENT PRICE: \$ \_\_\_\_\_ ALUM PRICE: \$ \_\_\_\_\_ BANQUET (if additional): \$ \_\_\_\_\_  
 EARLY BIRD DISCOUNT: \$ \_\_\_\_\_ LIFE MEMBER DISCOUNT: \$ \_\_\_\_\_  
 MEAL TYPES AVAILABLE (I.E. VEGETARIAN, VEGAN, GLUTEN FREE): \_\_\_\_\_  
 EARLY DEADLINE: \_\_\_\_\_ REGISTRATION DEADLINE: \_\_\_\_\_  
 SELECTED PLATFORM: \_\_\_\_\_ REGISTRATION LINK: \_\_\_\_\_

## 5. PROGRAMMING/SCHEDULE

START TIME / END TIME	ROOM NAME	WORKSHOP NAME	PRESENTER(S)	DESCRIPTION & OBJECTIVES

## 6. POST EVENT EVALUATION

ACTUAL ALUMNI ATTENDANCE : # \_\_\_\_\_ WHAT WENT WELL? \_\_\_\_\_  
 ACTUAL STUDENT ATTENDANCE: # \_\_\_\_\_ WHAT COULD'VE GONE BETTER? \_\_\_\_\_  
 FINAL COSTS: \$ \_\_\_\_\_ FINAL REVENUE: \$ \_\_\_\_\_

# PLANNING CHECKLIST

Below is a general conference checklist. Keep in mind that some of the items on the list may not be relevant to the specific conference or there may be additional needs, so be sure to modify based on the needs of the event.

✓	ITEMS TO CHECK OFF
	Set conference goals
	Determine conference date and city location
	Set preliminary conference budget
	Request cost quote from potential host properties
	Confirm conference location and sign contracts
	If needed, outside of venue contract, request a room block at a local hotel
	Confirm room block and sign contract
	Update conference budget based on costs in the signed contract(s)
	Calculate registration price
	Set up registration
	Test registration
	Open registration
	Provide instructions for how attendees can go about reserving a hotel room
	Create marketing collateral such as theme, social media posts, save the dates, etc.
	Outline a preliminary schedule
	Request recommendations for presenters and workshops
	Contact potential presenters and confirm availability and interest
	Compile a list of confirmed workshops including title, description and presenter
	Publish an updated schedule with the confirmed sessions and assigned rooms
	Select menu items from the venue or confirm caterer for conference meals
	Provide venue with updated schedule including room assignments and workshop times
	Order audiovisual equipment including projectors, screens and extension cords
	Increase marketing efforts to increase registration
	Close registration and gather final attendee headcount
	Order conference merchandise from a licensed vendor
	Provide final headcount to venue and caterer if applicable
	Email attendees with arrival and on-site registration instructions
	Print conference materials and ship them to site
	Pay all final conference bills
	Host the conference!

# CONFERENCE BUDGETING

EXPENSE ACCOUNT	COST	COUNT	TOTAL	ACTUAL COUNTS	ACTUAL COST	ACTUAL TOTAL
Facilities Rental			\$3,000.00		\$	
Provided Lunch	\$20.00	150	\$3,000.00		\$	
Provided Banquet	\$40.00	80	\$3,200.00		\$	
Conference Supplies & Memento	\$3.50	150	\$525.00		\$	
Opening Fellowship	\$ 3.00	150	\$450.00		\$	
Closing Fellowship	\$ 3.00	150	\$450.00		\$	
Workshop Support	\$1.50	150	\$225.00		\$	
Banquet Decorations	\$2.00	150	\$300.00		\$	
Promotions and Advertising	\$1.00	150	\$200.00		\$	
A/V Rental			\$1,200.00		\$	
Business Meeting Snacks	\$ 1.50	150	\$225.00		\$	
<b>TOTAL EXPENSES</b>			<b>\$12,775.00</b>			
REGISTRATION	COST	COUNT	TOTAL	ACTUAL COUNTS	ACTUAL COST	ACTUAL TOTAL
Early Student	\$55.00	50	\$2,750.00		\$65.00	\$ -
Late Student	\$ 65.00	10	\$650.00		\$75.00	\$ -
Early Alumni	\$ 70.00	50	\$3,500.00		\$75.00	\$ -
Late Alumni	\$80.00	10	\$800.00		\$85.00	\$ -
Banquet	\$40.00	80	\$3,200.00		\$50.00	\$ -
Early Alumni LM	\$65.00	25	\$1,625.00		\$70.00	\$ -
Early Student LM	\$50.00	5	\$250.00		\$60.00	\$ -
TOTAL INCOME*			\$12,775.00			
TOTAL PROFIT/LOSS*			\$ -			
OTHER REVENUE SOURCES*			TOTAL	ACTUAL COUNTS	ACTUAL COST	ACTUAL TOTAL

# SOCIAL MEDIA TIMELINE

TIMELINE	POST THEMES & IDEAS
6 MONTHS BEFORE	<ul style="list-style-type: none"> <li>• Post a save the date postcard sharing the date &amp; location of the conference.</li> <li>• Announce the conference theme and highlight main events such as a banquet.</li> </ul>
5 MONTHS BEFORE	<ul style="list-style-type: none"> <li>• Ask for speaker and workshop suggestions.</li> <li>• Recruit conference volunteers for on-site assistance.</li> </ul>
4 MONTHS BEFORE	<ul style="list-style-type: none"> <li>• Provide the registration link and essential registration information.</li> <li>• Emphasize early-bird deadlines or discount offers.</li> <li>• Share a preliminary schedule of events.</li> </ul>
3 MONTHS BEFORE	<ul style="list-style-type: none"> <li>• Share hotel, lodging and transportation information.</li> <li>• Post any new schedule announcements to get participants excited about the conference programming. Include the registration link!</li> <li>• Give information on attractions and things for attendees to do when they visit the host city.</li> </ul>
2 MONTHS BEFORE	<ul style="list-style-type: none"> <li>• Emphasize registration deadlines in all posts leading up to the conference.</li> <li>• Announce any keynote speakers or VIP presenters.</li> </ul>
1 MONTH BEFORE	<ul style="list-style-type: none"> <li>• Announce the final conference schedule.</li> <li>• Provide attendees with parking and on-site registration information.</li> <li>• Share event app or program information if applicable.</li> <li>• Share any last-minute details and encourage attendees to get excited about the arrival of the conference.</li> </ul>

# CONFERENCE

# LEARNING OBJECTIVES

Below are programmatic learning objectives to incorporate in conference programming. In addition to each learning objective, there is a suggestion for workshop or session content that addresses that learning objective. After the conference, participants will be able to...

## I. APPLY RISK MANAGEMENT BEST PRACTICES IN THEIR CHAPTER AND ALUMNI ASSOCIATION INTERACTIONS.

- Provide the group with a scenario and two possible reactions. Then ask them to split into groups based on which option they believe to be the better. Ask the groups why they picked the result they did and engage in a discussion on best practices when faced with a risk management scenario.

## II. DEVELOP A CHAPTER/ ALUMNI ASSOCIATION PROGRAM THAT CONSISTENTLY ADDRESSES MEMBERSHIP ENGAGEMENT TO INCREASE RETENTION.

- During essential group sessions, hold a brief presentation on the value of being a brother followed by breakout sessions with a facilitated discussion on specific topics related to membership engagement, including growth and retention

## III. UTILIZE LEADERSHIP TECHNIQUES AND SKILLS TO MANAGE THEIR CHAPTER OR ALUMNI ASSOCIATION EFFECTIVELY.

- Offer a workshop on best practices for leading a chapter meeting, planning an event, or organizing a service project.
- Include round table sessions where officers can discuss their experiences with their peers and learn from the experiences of others.

## IV. IMPLEMENT BEST PRACTICES WHEN USING APO VOLUNTEERS TO IMPROVE CHAPTER OPERATIONS.

- Host a panel of advisors and ask them to share their experience as an advisor. Have chapter members participate in a Q & A with the advisors.
- Have current volunteers host a workshop on how they got involved with the Fraternity and ask them to guide others looking to get involved.

## V. CREATE A SERVICE PROGRAM THAT EMPHASIZES EACH OF THE FOUR FIELDS OF SERVICE, COMMUNITY, CAMPUS, FRATERNITY AND NATION.

- Feature an on-site project such as a penny war or a can food drive. After the project, discuss the field of service that the project addressed and how the project could've been adapted to address a different field.
- Include a workshop that provides brothers with tips and tricks for planning and organizing a service project for their chapter. Challenge them by dividing them into groups and having them plan their project while at the conference.

# SAMPLE SATURDAY SCHEDULE GRID

	LOBBY	MEETING ROOM A	MEETING ROOM B	MEETING ROOM C	MEETING ROOM D	MEETING ROOM E	MEETING ROOM F	MEETING ROOM G
8 AM	REGISTRATION							
8:30 AM								
9 AM							APO LEADS	APO LEADS
9:30 AM								
10 AM								
10:30 AM								
11 AM								
11:30 AM								
12 PM		LUNCH & KEYNOTE SPEAKER						
12:30 PM		LUNCH & KEYNOTE SPEAKER						
1 PM								
1:30 PM								
2 PM					WORKSHOP	WORKSHOP	WORKSHOP	WORKSHOP
2:30 PM								
3 PM					WORKSHOP	WORKSHOP	WORKSHOP	WORKSHOP
3:30 PM								
4 PM					WORKSHOP	WORKSHOP	WORKSHOP	WORKSHOP
4:30 PM								
5 PM								
5:30 PM								
6 PM		BANQUET DINNER & PRESENTATION						
6:30 PM		BANQUET DINNER & PRESENTATION						
7 PM		BANQUET DINNER & PRESENTATION						
7:30 PM		BANQUET DINNER & PRESENTATION						
8 PM					CLOSING ENTERTAINMENT & CELEBRATION			
8:30 PM					CLOSING ENTERTAINMENT & CELEBRATION			
9 PM					CLOSING ENTERTAINMENT & CELEBRATION			
9:30 PM					CLOSING ENTERTAINMENT & CELEBRATION			