Let’s Plan an Annual Conference!

What better way to learn new skills, share information, network, and enjoy camaraderie with colleagues than at an annual educational conference of school business officials.

If your affiliate doesn’t have an annual meeting, now’s the time to start organizing. If your affiliate’s annual conference is a long-standing tradition, you can help it become an even bigger success.

Recruit a Committee

You are most likely a well-respected business official, an officer of your association, an executive director, or a concerned educator with school business responsibilities. Ask like-minded colleagues to join you in this endeavor. Think both program and process. Survey your members for suggestions on programming (see Figure 1). Build the conference around the identified needs of your colleagues, with a surprise or two to expand their horizons.

The members of your committee should have professional contacts and represent the geographical regions of your affiliate. School superintendents should be asked to excuse their staff members who serve on your committee during the workday so everyone can meet and plan when they’re awake and fresh with ideas.

Give committee members assignments. Record minutes of meetings and send copies to members with the agreed-on deadlines for completing work, booking arrangements, and announcing future meetings.

Conference Format

The conference format will vary considerably, depending on the your affiliate’s traditions, your local’s financial resources, and attendee expectations. In the for-profit sector, planners commonly build conferences around a series of high-profile speakers. They establish a theme or purpose for the conference and recruit speakers by referral or from the speakers’ agencies—most of their planning is then complete.

Such conferences frequently charge thousands of dollars in registration fees to attendees whose for-profit companies write off the expenses on their corporate tax returns. All too often, attendees sit through hours of single-presenter lectures in auditorium-style rooms with little interaction with one another. They return to their workplaces with little more than additional “consultants” for their personal digital assistants.

In the very not-for-profit world of education, we’re lucky not to have to take this route. Money does not nec-

By Richard H. Weeks

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Figure 1. Committee Survey for Your Annual Conference

The Annual Conference Committee is busy planning this year's big event. To make our conference as successful as it has been in the past, we need your input. We would appreciate any comments, ideas, or program suggestions that you may have. As always, it is our association's intent to provide you with current information relative to the school business profession. Please take a moment to fill out this form and return it to our office. Thank you.

I. Program comments (Types of programs or speakers you would like to see or hear):

II. Technology comments (Would you like to have technology seminars similar to this year or something different?):

III. Featured speaker comments (Who or what type of featured speaker would you like to hear?):

IV. Facility comments (Positive or negative comments about last year's hotel, conference rooms, service, etc.):

V. Other comments:

Your Name: ____________________________
District: ______________________________
Telephone: ____________________________
e-mail: ________________________________

Would you like to serve on the Annual Conference Committee? Yes No

Form courtesy of Donald D. Johnson, Massachusetts Association of School Business Officials.

Figure 2. Two Case Studies—Building Successful Breakout Sessions or Workshops

The annual conference committee surveyed its membership in September for the upcoming May conference. Frequently mentioned topics included "user fees" and "building security." The committee chairman assigned the topics to two members whose task it was to produce sessions on these topics.

ASBO member Sally P. W. Douglas produced a well-attended session entitled Making Sense Out of User Fees. Sally took her time to investigate user-fee programs that colleagues had implemented. She chose a three-member panel discussion format, with each member assigned to discuss the best practices of implementing their user-fee programs. Each panelist spoke for approximately 10 minutes. Sally fielded questions and provided follow-up advice. The panelists were required to bring handouts for all attendees. A simple PowerPoint presentation provided continuity throughout the workshop. With a clearly defined objective of "discussing the best practices of implementing user fees," she did not allow the session to dwell on war stories of programs that failed.

The conference chairman asked ASBO member Stephen M. Fortado to produce a session entitled Planning for School Security. Steve recruited Flansburgh Associates, Inc., architects and Certificate of Merit recipient in ASBO's 2002-2003 Awards for Excellence in Architectural Design program. He also recruited a school safety consultant from Ingersoll-Rand Corporation and a vendor who sells school security equipment. These panelists represented vendors in a vertical reporting relationship to one another. Each had an important function in Steve's stated objective: "School building security issues pertaining to management and operations, construction and renovations." Numerous handouts were given to the attendees. Steve's Power Point presentation reinforced the importance of vendors working collaboratively to achieve a singular goal in current school operations.

The conference evaluation forms completed by attendees at the conclusion of those sessions gave them high marks. The vendors did not give sales pitches. Both sessions started and ended on time. The members felt engaged in a worthwhile dialogue with the moderators.

- Breakout workshops or discussion groups are topical in nature and work well when scheduled in clusters during normal business hours. They can be handled in one of three ways: a speaker can give a presentation and engage the participants in a dialogue; a moderator can host a panel discussion of presenters; or a facilitator can handle a training session using games and simulation exercises (see Figure 2).
- Round-robin networking tables use a format in which presenters sit at assigned tables and host attendees according to a prescribed plan. These sessions are popular with vendors who can brief business managers quickly.
about their goods and services. Business managers can, in turn, acquire much information in a brief time.

- **Social events**, not so cleverly disguised working sessions, are often called receptions, reunions, or golf tournaments. Business managers, vendors, and guests can engage in relatively productive conversations at these informal afternoon or evening events.

Organize each day’s presentations so that the more “serious” sessions are in the morning, with lighter presentations in the afternoon and evening. Attendees get tired and saturated with information and will begin to “disappear” as the day goes on—especially if your conference is in an exotic location.

Some conference planners prefer to label sessions by levels (Level 1, Level 2, Level 3) depending on the expected knowledge or skills of the attendees. This technique is useful for technical sessions, such as those in the microcomputer classroom.

### Featured Speakers

Your conference will be more successful if you incorporate featured speakers. These special guests can serve as anchors at the general convocations. They serve many purposes—from providing your membership with useful factual information and making futuristic predictions to inspiring attendees to think or laugh or serving as a fulcrum for personal or organizational change.

In the for-profit world, featured speakers are generally drawn from agencies. Most groups prefer to hear a Hollywood celebrity, former all-star athlete, or self-made business tycoon. The 50-minute inspirational talk is fairly predictable. He or she talks about overcoming childhood adversity—neglect, abuse, poverty, crippling disease, or accident—to grow up into a major success. The speaker's agency assures you that the message will definitely be “tailed” to your organization. The session is typically followed by a book signing by the speaker in the lobby of the conference center. All of this will cost $5,000 to $50,000, in addition to travel fees and lodging expenses. The autographed autobiography costs approximately $35 (motivational speakers don’t generally take purchase orders).

As a line item in your affiliate’s annual operating budget, your conference budget should set limits on fees and expenses for conference speakers (See Figure 3). The committee should recruit speakers from within these guidelines. If you want a motivational speaker, you can find exceptional ones in the $5,000 to $15,000 range, including expenses.

Speakers are either self-employed or are available through agencies. Remember that you are dealing with the entertainment business. You need a contract that spells out all terms of the speaker’s engagement, including an accountability clause in case the speaker backs out. Speakers will occasionally cancel when they receive more lucrative offers or better professional opportunities. For this reason, organizations often retain backup speakers for no-shows.

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**Figure 3. Speaker and Facilitator Checklist**

- Have speakers and facilitators been invited? Are they aware of the types of presentations you need? Do they know the length of time available to them?
- Are all financial arrangements understood? Are contracts necessary? When is payment to be made?
- Are biographical materials and photos available for publicity and introductions?
- Have hotel and meal arrangements been made for them?
- Have members of the conference committee been assigned to greet them, introduce them to officers and guests of your local affiliate, and orient them to conference and affiliate issues?
- Will they need assistance during their presentations? Are all audiovisual requests ready for their sessions? How will handouts be copied and distributed?
- What are your plans in the event of “no shows”?

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If you have no funds budgeted for speakers other than token funding for expenses or small gifts, you have a challenge ahead of you. Your committee should look locally: publicly elected officials, important appointed state officials, presidents of local colleges or universities, education department chairs, clergy, commissioned military officers, local media personalities, and gregarious successful businessmen. These individuals would simply be excused from their work to speak to you. They are out there. However, you must network to find them.

When you have limited funding, you can expand your opportunities. If you want to inspire your membership with humor and cannot afford a celebrity, try hiring a comedian who works at local comedy clubs. Often, a featured speaker who draws on adventure is motivational. Many former Olympians teach in the physical education departments of local colleges and universities. The former all-star linebacker from the agency would be great, but the woman who was on the track team that won the gold medal at the Olympics in Atlanta might offer just as compelling a story.

In addition, inquire about recent graduation speakers at your local colleges and universities. Many of these schools are as cash-strapped as your local affiliate and have done their homework to find good speakers at reasonable rates.

If you have significant resources, select someone who is important—not simply popular—as a featured speaker. Vendor sponsors may be willing to pick up this cost for you if you establish an appropriate connection between your affiliate, the sponsor, and the featured speaker. How about former President Jimmy Carter, recipient of the 2002 Nobel Peace Prize for his work as a humanitarian, statesman, and peacemaker? Or how about John Walsh, creator of TV's *America's Most Wanted*, for his tireless advocacy for victim's rights and missing children? High-profile speakers may combine an appearance at your event with others in the area or region, making the trip worthwhile.
Attention to all aspects of the conference planning process is critical to success.

Be prepared to explain to the high-profile speaker’s agent why it’s important for him or her to take the time to speak to your group.

**Facilitators**

Unlike featured speakers, whose primary task is to speak, facilitators are beneficial to an annual conference by managing group discussions and handling leadership training. Depending on the event, facilitators are accustomed to working with business managers in groups of up to 100 or more. Those who are well versed hold advanced degrees in psychology or business management. Retain facilitators who are recommended by colleagues who have experienced their work.

Facilitators serve as change-agent catalysts for members’ self-improvement or for affiliate growth and development. They are useful in leading conference sessions devoted to strategic planning or for introducing new management techniques. The most popular facilitators capitalize on their celebrity status and best-selling management or self-help books. Be skeptical of trendy presentations that lack substance or are spin-offs of pop-psychology fads.

Participants at a facilitator’s session may be involved in games or simulations, which are particularly suited to teaching problem-solving and decision-making skills. Games involve competition between individuals or small groups. The facilitator sets the stage and prescribes the rules. He or she brings closure to the gaming for problem analysis and group self-evaluation.

One popular game used in training sessions is the resource-allocation, “rearranging the chairs on the deck of the Titanic” exercise. The players must decide how to best use limited resources in retrenchment of a school district’s annual operating budget. What reduction in services would you recommend to your superintendent if the district had to make a 2.5% cut in custodial and maintenance funds? Participants benefit from multiple, tried-and-tested solutions offered by seasoned professionals.

Facilitators often use simulation exercises to develop participants’ awareness and comprehension of the elements and systems that make up the whole. Business managers are encouraged to “see not just the trees but to comprehend the forest.” As specialists responsible for large amounts of information, they are part of the whole of a school district or community and must understand the organization and be able to communicate with its other members.

Facilitators prefer simulation exercises that model reality. For example, a school district’s newly drafted emergency response plan can be hypothetically tested, with the facilitator directing the “players” along a path, overcoming obstacles until they reach a goal. The facilitator can test and retest the players, increasing the difficulty of the obstacles and pushing out further the expected goal. Preparing business managers in hypothetical simulations will help prepare them for what they may face one day in reality.

**Technology and Microcomputer Lab Classrooms**

Technology and microcomputer lab classrooms could be handled by a techno-savvy member of the conference committee or by technology-interested members of your affiliate who would collaborate with a committee designee.

A nationally recognized laptop computer maker could be asked to sponsor a 16-laptop microcomputer classroom. The company could furnish much of the hardware and software to make the classroom functional. The company’s trainer could be recruited to teach some of the sessions.

Technology labs allow hands-on learning.
Expect your computer lab classroom sessions to be popular. Attendees could be encouraged to bring their own laptops, including network cards and Dynamic Host Configuration Protocol setup. A typical classroom should be an air-conditioned room without windows to prevent glare and distractions and to maintain security. The lab might include the following:

- Sixteen wireless laptops running Windows 2000 or Office XP Professional software;
- A secure storage unit for the laptops and all other expensive equipment for the off-hours;
- A T-1 high-speed Internet connection, as provided by the local utility company through your conference facility;
- A U-shaped seating arrangement for 30 attendees; and
- An LCD projector and screen.

Attendees are interested in a variety of topics. An often-heard comment is that they enjoy the opportunity to ask the instructor “really dumb questions without subordinates from the office back home laughing at them.” The following are some of the more popular session topics:

- Excel, word processing, and Access, in Levels 1, 2, and 3;
- Using the Internet as a research tool;
- How to log on to and use state government Web sites, especially education, revenue, and procurement offices;
- New software product releases; and
- Web page design and start-up.

Schedule sessions so that the information technologists in charge of the microcomputer classroom have time for proper equipment maintenance and setup for future sessions. Avoid scheduling too many back-to-back sessions. Attendees tend to linger at the conclusion of sessions to ask the presenters questions and to pack up their microcomputers. Recruit multiple trainers and presenters; this work is technically challenging and exhausting.

**Vendor Sponsorship**

Annual conferences are expensive events. By actively involving your affiliate’s vendors, you can help defray costs and keep your attendees’ registration fees at reasonable rates. Your executive director or an influential vendor could solicit financial support to lessen the conflict-of-interest issue between your affiliate’s business managers and vendors.

One effective approach is to mail vendors a listing of sponsorship opportunities several months before you print your conference brochure (see Figure 4). This spreadsheet outlines specific events, awards, speakers, and conference site expenses that vendors could sponsor. List your suggested donations, dates and descriptions of events, and marketing exposure. Follow-up mailings of the same spreadsheet could update the vendors who have pledged financial support or in kind services.

You can further acknowledge your vendors through a special reception during the conference. Invite your affiliate’s officers and board of directors, special guests, and featured speakers. After the conference, send your vendors thank-you letters.

**Trade Show and Exhibition**

Including a trade show or exhibition with your annual conference adds another dimension to the event. Vendors prefer a show with a limited number of hours on one day of your conference, without conflict from other events. This time frame reduces their expenses for housing accommodations, and it maximizes their exposure to the attendees.
Conference planners prefer this schedule because administrators from other school districts can attend the conference for one day at a special rate. A good mix of vendors would have much to offer school superintendents, building maintenance directors, school food-service directors, information technologists, and transportation directors, in addition to business managers.

More tax funds are spent on America’s public and private educational institutions than on any other government-sponsored function, including medical care or defense. With more than $475 billion spent on education annually, there is considerable interest from business to provide goods and services tailored to the needs of educators and to those who manage them.

Vendors want to sell to those who buy. They are keenly aware of the decision makers in your school district. The four leading textbook and testing companies target their sales to principals and curriculum directors. Technology vendors sell to superintendents and information technologists. Special-needs consultants and private schools promote themselves to special-education directors. Business managers are those most responsible for purchasing maintenance, personnel services, transportation, food service, school supplies and equipment, construction services, and much more.

Exhibitions have logistical needs that require special planning. Prepare a floor plan for the exhibit hall to ensure that the vendors can be reasonably accommodated. There are many things to consider:

- Vendors could be assigned to tables of uniform size, such as six-foot tables in a seven-by-eight-foot floor area.
- Tables could be covered with linen tablecloths and separated by curtain walls.
- Vendors should have plenty of time before the exhibition for display setup. Possibly allow vendors to set up one day before the trade show.
- Exhibit space should be assigned on a first-come, first-served basis. Encourage early registrations by offering a discount.
- Vendors should have access to the exhibit hall only through specific entrances with loading docks.
- Vendors who require ISDN/DSL lines should be situated near one another. Often, a special drop-down electrical line has to be set up. Arrange for an electrician to be on site for a limited number of hours during setup to assist vendors.
- Fire codes generally prohibit the taping or pinning of paper materials to drapes, walls, and doors and the use of flammable liquids, such as gasoline.
- Vendors who bring oversize, custom-built portable displays should be required to purchase additional space in the hall. Adjust your floor plan accordingly.
- Generally, conference sites don’t provide free extension cords, power strips, and telephone, facsimile, Internet, or photocopy services. Inquire about these services and inform your vendors of the respective costs in advance of the exhibition.

Conference Site Selection
Site selection probably has no bearing on the attendance or success of the annual conference. School business managers will take time off from their work to attend a one- to three-day conference if it offers well-prepared informational presentations. And regardless of the site, they will figure out how to have a good time when not involved in structured sessions.

Your affiliate can offer an inexpensive conference by using a combination of a school and nearby motels. Schools are ideal for conferences because their facilities lend themselves to the various types of sessions needed. General convocations can be held in the school’s auditorium. Breakout sessions can be handled in a cluster of classrooms. The cafeteria is available for lunches and refreshments. There are plenty of restrooms and free parking lots. School rental fees are generally reasonable for education associations and are sometimes waived.

Unfortunately, schools don’t offer the amenities of hotel conference centers. And they can be used only when school is not in session. Nearby motels should really be “nearby.”

If your members can handle higher registration, travel, and expense fees, you can hold your annual conference at a downtown hotel or resort. These locations should be able to offer your affiliate all of the amenities it needs. There are always political considerations when selecting a conference site at the lake known for its terrific walleye fishing, the mountain lodge famous for its nighttime alpine skiing, or oceanside cottages with sandy beaches and the requisite clam bakes. Some might consider such locations too resort-like.

It is safer to keep all registered members and guests at one location without the need for cars or shuttle buses.

Organizing a conference at a popular, tony resort takes two or more years of planning. Affiliates prefer to return to the same resort conference centers in successive years because of the investment in time and planning by their conference committees and executive directors. Members of your con-
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