



**International Association of**  
**Administrative Professionals®**

**OHIO DIVISION  
ANNUAL MEETING  
PLANNING MANUAL**

# Ohio Division Annual Meeting Planning Manual

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## **Introduction**

This manual is a detailed outline of Annual Meeting preparations, which has been compiled by the Ohio Division Board of Directors. It encompasses many years of experience and recommendations to ensure a successful, organized, and stimulating Annual Meeting.

While it may appear that the Host Chapter requires prior approval of the Board for many items, please keep in mind that it is only our sincere desire to make certain we lend the Host Chapter our cooperation and experience. We feel this is very important for a successful Annual Meeting, which includes avoiding a deficit by the Host Chapter. The Host Chapter and the Division will share equally in all profits or losses incurred unless otherwise stated in this manual.

If any questions arise which are not answered in this manual, please do not hesitate to contact your Division Coordinator. Also, if you find any manner or methods which can be improved or seem useless, let your Division Coordinator know. There may be a valid reason for having incorporated such practices in the Annual Meeting plans, or it may be time to evaluate and make changes accordingly.

Remember, we have your desire to make this another outstanding Ohio Division Annual Meeting. Open communication is vital to this goal.

Ohio Division Board of Directors

## General Information

Details concerning each function of the Annual Meeting are elsewhere in this manual (refer to Table of Contents); however, the following are some general items that are of importance and are listed first so the General Chair may review them before distributing the Planning Manual to various Committee Chairs.

## Contracts

Any contracts, other than for the facility, may not be signed before July 1 of the year before the annual meeting being planned. This ensures that the Division officers making the decisions will be in office at the time of the annual meeting.

## Hotel Commitments

A copy of the signed contract with the host facility is to be given to the Division Coordinator no later than **August 15**.

Normally, 150-200 guest rooms are required for the Annual Meeting. The banquet room should seat 250-300 people comfortably. 200-250 people usually attend business sessions and other meal functions. Round tables are preferred for use at all events. Additional information is included in the *Procedure to Bid for Ohio Division Annual Meeting* section.

## Meal Ticket

As most hotels go with a firm, final headcount, it is not necessary to issue meal tickets for attendees. If meal tickets are issued to partial registration attendees, it is recommended that a different colored badge be issued to partial registrants. This will make it easier for the Host Chapter to recognize those people to collect tickets from. *If the hotel requires meal tickets, the Host Chapter should issue them to all registrants.*

**Suggestion:** Provide meal tickets for special meals so wait staff knows who to serve special meals to.

### Tables

All Head Tables are to be skirted and elevated on risers if the hotel has them available or can obtain them for a reasonable fee. Two or three foot risers are preferred; 1 foot is acceptable. Water pitchers and glasses should be on all tables, particularly the Head Table and on the tables for Delegates and Alternates.

### Computer Equipment

If necessary, the Host Chapter is responsible for arranging for a computer and printer to be in the Division officers' suite on Thursday afternoon before the Annual Meeting for use throughout the weekend. A copier or printing service shall also be available at all times for Division officers use for last minute printing of multiple copies. The Division Corresponding Secretary will determine the software and equipment needs of the Division Board since this person generally uses the equipment.

Verify with the current Board to determine if the equipment is needed in the officers' suite.

### Theme

The Host Chapter selects the theme.

### Speakers

All speakers should have a message that is applicable to the administrative professional and in keeping with the image of a professional and educational association. The Division Board will give final approval on all speakers along with their costs. Three to five (3-5) choices, with costs, should be submitted to the Division Board. This provides the Division Board choices as to the type of speaker we are looking for.

In contacting speakers, be sure they understand you are only making an inquiry, and if selected, a confirmation will be provided in writing, which they will be requested to sign if agreeable to them.

*Note: Keynote speakers should never be affiliated with the organization.*

### Division Coordinator

The Vice President of the Ohio Division for the year of the Annual Meeting shall be the Division Coordinator for the Host Chapter. If the Division Vice President is a member of the Host Chapter, it is advisable for the President to rearrange Board Contact responsibilities and assign another officer the role of Division Coordinator.

The General Chair will be the primary contact with the Division Coordinator. It will be the responsibility of the General Chair to ensure that the Division Coordinator receives copies of correspondence and minutes from all meetings of the Host Chapter.

It is highly recommended that an open flow of communication be constantly maintained between the General Chair and the Division Coordinator, including e-mails, letters, faxes, and conversations. This is not meant to alienate the Ohio Division President; instead, this practice will help to eliminate all problems and/or questions that might arise during the planning phases of the Annual Meeting.

### International Officers

If an International Officer, or anyone from Headquarters, is flying into the host city to attend the Annual Meeting, it is recommended that someone meet them at the airport (and return). The General Chair should check with the Division Coordinator to see if a member from the Host Chapter should be asked to handle this or if another member of the Division (or a Division Officer) will do this. The Division Coordinator should contact the International Officer(s) for their preference; they may have made arrangements on their own.

### Files

It is recommended that any files, binders, supplies, etc., that are available to turn over to the ODAM Chair for the following year's event be done after the business session on Sunday. This would enable the transition to flow a lot smoother and quicker.

### Miscellaneous

It is recommended that a copy of any correspondence the Division President or other Division officer(s) sends to request welcomes, attendance, proclamations, etc., be sent to the ODAM Chair in order to eliminate any duplication.



**Financial**

The Division Treasurer should send the General Chair a copy of any checks issued that were not requested by the Host Chapter (i.e., check for International labels, any refund checks, etc.).

## **Budget**

### **General Information**

- Federal Tax ID # is 34-6562675 and should be printed on registration form.
- All checks issued should be payable to Ohio Division IAAP.
- The Division Treasurer will handle receipt and disbursement of funds. The Host Chapter Planning Committee will maintain financial records.
- When submitting checks to the Ohio Division Treasurer, include a breakdown with the checks; i.e., what the money from the check goes for: Open House, Banquet, Business Session, etc.
- A sample of the Expense Voucher form that must be used is included in the back of this manual.
- The ODAM budget is not responsible for the event registration of the Award For Excellence (AFE) recipient (Banquet); the scholarship recipients (Recognition Luncheon); and/or any contest prizes the Division is awarding (i.e., Membership Blitz). The Division pays for the AFE winner's banquet registration and the various contest prizes. The Scholarship Committee pays for the lunch registration of the scholarship recipients.
- Any income generated by the Host Chapter because of raffles will be a part of the Host Chapter's treasury, not the ODAM treasury.
- Any income generated from sponsors will go in the ODAM treasury. IF the sponsor specifically specifies that they are sponsoring a specific event, then that income generated from the sponsors will go to that specific event. Additional information on sponsors is included in the Functions Section of this manual.

### Approval of Division Board

- The General Chair must submit a proposed budget for the Annual Meeting to the Division Coordinator by **August 15**. A revised budget is to be submitted to the Division Coordinator by **January 15**. The budget is to include **ALL** income and expenses. These are to be as accurate as possible.
- Division officers will review the budget and advise the Division Coordinator of comments or changes. Division Coordinator will advise the General Chair of comments and/or approval.
- Approval for all fees charged to members, such as Registration Fee and additional charges, **MUST** have Division Board approval **prior to mailing of any announcements**, which state charges.

### Hints on Preparing the Budget

- Income should be based on **FULL** registration of 150, with consideration for adjustment based on the previous year's Annual Meeting registration.
- Be sure to include **PARTIAL** registrations for all functions in both income and expense figures.
- When preparing the budget, all costs related to an event should be included in that event's expenses (i.e., table decorations, speakers, event program, meal, etc.).
- Additional sources of income might include sale of exhibit space (chapters and Ohio Division Committees will be charged a minimal exhibitor fee); sponsors; contribution of budgeted items (i.e., program printing, etc.). If used, these also should be included in the budget and noted.
- Any profit or deficit for all functions with the exception of Trips and Tours will be shared equally by the Host Chapter and the Division. Trips and Tours is the sole responsibility of the Chapter.

## Costs For Which Annual Meeting Budget is Responsible

- The Division Board and Parliamentary Advisor (7) receive full registration (\*), travel, and other expenses not included elsewhere in the budget.

*Note: Full registration DOES NOT include Trips and Tours or the Friday night meal if an optional expense for attendees. Full registration DOES include the Friday seminar*

- All hotel rooms used by the Division Board and Parliamentary Advisor. This should include one suite and two, possibly three, rooms with two double beds, depending on the Board needs at that time. The General Chair should negotiate with the hotel for complimentary rooms and/or reduced rates.
- ONE registration will be paid. Typically the General Chair receives this ONE registration – but the ONE registration can be divided among co-chairs as desired by the committee.

The General Chair's hotel expenses are not included in the ODAM budget. The General Chair can negotiate with the hotel for a complimentary room; however, this should not jeopardize the complimentary room(s) for the Division Officers or any International personnel in attendance.

- Per 1999-2000 International President – The expenses of International officers attending Annual Meetings should be paid for by the International officer UNLESS the Division President specifically invites the International officer. When the International officer has been specifically invited to attend the meeting, all of their expenses should be covered by the ODAM budget. Many times an International officer will attend the event and room with the District Director or someone else who has invited them. This officer's registration should not be covered in the ODAM expenses unless the Division has the money to do so and only then if they wish to do so.
- As a courtesy to the current Division President and Division President-Elect (incoming President), the guests attending the Banquet will pay the meal COST only as their registration fee to this event. The Division Coordinator is responsible for sending a letter and special registration form to these two individuals regarding their special cost.
- Costs of meals, travel, hotel, etc., for speakers are part of remuneration.
- Ordering of Division members' mailing labels from International – The Division President and Treasurer will place this order at the time of General Chair's request.

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- Include cost of supplies in preliminary budget. If a company agrees to donate supplies, the budget can be modified when revised in January. It is recommended that this agreement with a company donating the supplies be placed in writing.
- The Host Chapter should budget for fees charged by ASCAP (American Society for Composers, Authors and Publishers) for music played at the Annual Meeting. The rate varies depending on the type of music and the number of attendees. Please refer to the ASCAP information included in the back of this manual.

### Items for Budget Planning

- The following items must be considered. There may be additions, depending upon Host Chapter planning.

#### **Income**

|     |  |     |
|-----|--|-----|
|     | Business Session (If a member registers for the Business Session ONLY – they should be charged a small fee – a \$5.00 - \$10.00 to cover the cost of the room, etc.) |     |
| 150 | Full Registration  | @\$ |
| 20  | Friday-Saturday Only Registrations   | @\$ |
| 10  | Saturday Luncheon Only Registrations   | @\$ |
| 20  | Banquet Only Registrations   | @\$ |
| 10  | Brunch Only Registrations  | @\$ |
| 180 | Open House (Includes 25 Friday-Saturday Only)  | @\$ |
| 180 | Saturday Luncheon (Includes 25 Friday-Saturday Only Registrations Plus 10 Saturday Luncheon Only Registrations. Add speaker and any others who might be guests.)     | @\$ |
| 200 | Social/Banquet/Reception (Includes 25 Friday-Saturday Only Registrations, 20 Social/Banquet Only. Add speaker, entertainers, and any others who might be guests.)    | @\$ |
| 180 | Brunch (Includes 10 Sunday Only Registrations. Add speaker and any others who might be guests.)  | @\$ |
|     | Registration costs: paper, printing, postage, envelopes, inc.  |     |
|     | Mailing labels from International headquarters.  |     |
|     | Mailing costs: bulk mail for approximately 1,800 members.  |     |
|     | Name badges (color coded).   |     |
|     | Miscellaneous: binders, folders, maps, etc.  |     |
|     | Exhibits: set-up, outlets, guard, etc.   |     |
|     | Hospitality: coffee and miscellaneous items.   |     |

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|  |   |  |
|--|---|--|
|  | Program Books: one overall program for entire weekend, binder, folder, etc.   |  |
|  | Church Service (optional): Minister/Priest, musical arrangements, candles, etc.   |  |
|  | Memorial Service: Soloist and accompanist, if fee is charged (decision of Division President), Ohio Division Friendship Choir (decision of Division President), flowers (usually carnations but selected by the Division President), and vase provided by the Host Chapter. |  |
|  | Centerpieces for Open House, Banquet, and Breakfast (optional).   |  |
|  | Flowers and/or candles for Installation of Officers (optional and at the request of the President-Elect).   |  |
|  | Speakers and/or entertainment (as applicable):<br>Friday Seminar<br>Friday Open House<br>Saturday Recognition Luncheon<br>Saturday Afternoon Seminar<br>Saturday Banquet<br>Sunday Breakfast  |  |

*Note: Full registration must be less than the total for individual items. Meals and refreshments (all prices to include tax and gratuity).*

## **Host Chapter Meeting With Ohio Division Board (Site Visit)**

- A Joint meeting of the Division Board and Host Chapter Annual Meeting Planning Committee is usually held during September.

### **Attendees**

- Host Chapter General Chair
- All Host Chapter Committee Coordinators
- Host Chapter President
- Division Board of Directors
- Ohio Division recommends that an invitation be extended to the following year's Host Chapter's Annual Meeting Chair/Co-chair (for observation purposes only).

### **Location**

- The meeting will be held at the site of the Annual Meeting.

### **Purpose**

- This meeting shall be to review all committee plans. Committee Coordinators should be prepared to give a brief report on proposed plans for their particular function. In the absence of any Committee Coordinator, the General Chair should provide this information. Samples of suggested items should be available for the Division Board's review.
- The Division Officers and the Host Chapter will work together to discuss proposed plans, suggestions, ideas, etc. The Division Coordinator will be the contact person for the host chapter in answering any concerns or questions they may have after the site visit.

### Time

- The usual time is on Saturday morning from 9:00 a.m. – 11:30 a.m., but the Division Coordinator will notify the General Chair of the exact time. The General Chair is to notify all attendees of the time. A tour of the meeting facilities is to be arranged by the General Chair.

### Responsibility of General Chair

#### Agenda

- The General Chair will forward a complete agenda at least one week prior to this meeting to the Division Coordinator for distribution to all of the members of the Division Board.

#### Site Visit Book

- The General Chair is responsible for compiling a site visit booklet that includes the proposed budget and arrangements for each event and/or function of the Annual Meeting. This booklet should be prepared in event order and pages numbered for ease in locating information for a specific event.

#### Accommodations

- The General Chair should reserve the meeting room in close proximity, one of which shall be a suite with a table, for the Division Officers for Friday afternoon/evening use. This is NOT an ODAM expense; it is an Ohio Division Board expense.
- The General Chair should also reserve a conference room for the Saturday morning meeting of the Host Chapter Planning Committee Chairs, Division Officers, and the following year's ODAM Chair. This conference room will be used by the Division Officers to conclude their Board Meeting Saturday afternoon, if necessary. If there is a charge, it IS the ODAM expense.
- As soon as possible after arranging for the hotel, the General Chair should send confirmation of room accommodations for officers to the Division Coordinators.



### Meeting Arrangements

- The General Chair should make arrangements in advance for the hotel or facility manager to meet with the committee and Board of Directors for a tour of the facilities to discuss general details and requirements, etc. The Ohio Division Board recommends this be done before the joint meeting, but may be arranged after the meeting.
- A continental breakfast should be provided for those attending. This IS an ODAM expense. The breakfast and lunch for Division Officers and General Chair go under the Miscellaneous category and IS in the site visit budget.
- A luncheon for those present should also be arranged using one of the proposed meals to be served at an event during the Annual Meeting. It IS an ODAM expense for Division Board and ODAM General Chair/Co-Chairs. All others ARE responsible for paying for their meal; unless provided complimentary by the hotel.

### Budget

- The General Chair should send a tentative budget for the Annual meeting to the Division Coordinator by **August 15**. For further clarification, refer to the Budget Section.

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### **Functions**

The following schedule is a guideline and the Ohio Division Board has final approval.

#### **FRIDAY**

|                            |   |
|----------------------------|---|
| Trips/Tours (Optional)     | It is recommended that these times do not interfere with the afternoon seminar. |
| Silent Auction             | 9:00 am – 9:00 pm   |
| Hospitality                | 9:00 am – 6:00 pm   |
| Registration / Credentials | 9:00 am – 9:00 pm   |
| Seminar                    | 2:00 pm – 4:00 pm   |
| Optional Dinner            | 5:00 pm – 7:00 pm   |
| Open House                 | 7:00 pm – 11:00 pm  |
| Exhibits                   | 7:00 pm – 10:00 pm<br>(Does not include setup and take down time)               |

#### **SATURDAY**

|   |  |
|---|--|
| Hospitality                               | 7:00 am – 8:30 am<br>4:00 pm – 5:00 pm |
| Silent Auction                            | 7:00 am – 8:30 am<br>4:00 pm – 5:00 pm |
| Registration / Credentials                | 7:00 am – 9:00 am<br>2:00 pm – 5:00 pm |
| Delegates' Briefing (open to all members) | 8:00 am – 8:30 am                      |
| Opening and Business Session              | 9:00 am – 12:00 pm                     |
| Recognition Luncheon                      | 12:00 pm – 1:30 pm                     |
| Seminar                                   | 2:00 pm – 4:00 pm                      |
| Church Service(s) (optional)              | 4:30 pm – 5:30 pm                      |
| Social Time                               | 6:00 pm – 6:30 pm                      |
| Banquet                                   | 6:30 pm – 9:00 pm                      |
| Joint Reception                           | 9:00 pm – 11:00 pm                     |

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### SUNDAY

|                                |                    |
|--------------------------------|--------------------|
| Hospitality                    | 7:00 am – 7:45 am  |
| Memorial Service               | 8:00 am – 8:30 am  |
| Breakfast                      | 8:30 am – 9:15 am  |
| Business Session (reconvenes)  | 9:15 am – 12:00 pm |
| Silent Auction (pick up items) | 12:00 pm – 1:00 pm |

### Suggested Committees

- The General Chair of the Host Chapter determines the number and type of committees. Suggestions are:
  - Finance (Treasurer for Annual Meeting). The Division Treasurer will handle actual receipt and disbursement of funds.
  - Registration – possibly include coordinators for:
    - Registration
    - Credentials
    - Ad Hoc Committee to collect materials, including Division and Chapter Reports, prior to Annual Meeting
    - Delegate Packets
    - Name Badges
    - Miscellaneous
  - Program Printing
  - Publicity
  - Hospitality
  - Protocol (including place cards for Head Table). The Host Chapter Protocol Coordinator is responsible for ensuring that persons seated at the Head Table are in proper place and/or lined up according to seating in the Protocol Booklet. The Protocol Coordinator is responsible for handling this for all functions. Line-ups usually take place at:
    - Opening and Business Sessions (Saturday morning)
    - Recognition Luncheon (Saturday afternoon)
    - Banquet (Saturday evening)  
*Note: Line-up is based on officer's position vs. seating so that the President-Elect and President are last to enter the room.*
    - Breakfast (Sunday morning)
  - Expediter (handles all physical arrangements and all hotel contacts).
  - Open House
  - Social (usually held before the Banquet)
  - Recognition Luncheon

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- Worship and Memorial Services
- Breakfast
- Trips/Tours (Optional)
- Exhibits
- Print Media Competition – determined by President-Elect

*Note: All Committee Coordinators will report to the General Chair who reports to the Division Coordinator.*

### Publicity

- It is the responsibility of the Host Chapter to arrange for all publicity, etc., with local papers and news media. Releases should be sent to the Division Coordinator for approval.
- The Host Chapter should submit publicity releases to the Division Corresponding Secretary beginning with the September issue and continuing each month for inclusion in the Ohio Division newsletter, *Buckeye Broadcaster*. The contents should be a different ‘teaser’ each month designed to attract attention (i.e., time and place of meeting, theme, and any other information to generate interest).
- An IAAP sign shall be displayed in the hotel lobby and at the registration area. Sometimes the hotel will arrange a greeting on their marquee.

### Registration Procedure

- Annual Meeting Registration Form should contain the following. This should include a separate registration cost for Members, Non-members/Guests, and Students:

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### Cost of Registration

|  |                  |
|--|------------------|
| Full Registration (Friday, Saturday, Sunday) | \$               |
| Friday, Saturday Only                        | \$               |
| Friday Seminar                               | \$               |
| Friday Open House                            | \$               |
| Friday Open House Optional Meal              | \$               |
| Saturday Business Session                    | \$5.00 - \$10.00 |
| Recognition Luncheon                         | \$               |
| Saturday Afternoon Seminar                   | \$               |
| Saturday Banquet                             | \$               |
| Sunday Breakfast                             | \$               |
| Tour(s) If Scheduled                         | \$               |

### Registration Information

- Delegate or Alternate
- First Time Attendee
- CPS/CAP/Recertified and year
- International Officer
- International Committee Chair
- Past International Officer
- Member, Institute for Certification
- Past Division Officer
- Division Committee Chair
- Hotel reservation and accommodations information.
- Map, along with specific directions to site of the meeting.
- Highlights of the Annual meeting Program. **Emphasize** the educational aspects since many employers evaluate this flyer to determine if they will defray expenses of members.

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- Place the Member Column by the Total Column since the member rates are used the most.
- Host Chapter should submit draft of registration form by **January 15** or earlier, if possible, to the Division Coordinator for approval. Division Coordinator to provide copies to Division officers for approval.
- Upon approval, the registration form is to be mailed to ALL members at the same time (advance copies via first-class mail, by two or three days, to Division Board).
- If the Friday meal is not included in the Open House rate, the Full Registration line should read as follows: “Full Registration includes: Friday Luncheon, Saturday Seminar, Saturday Evening Banquet, and Sunday Breakfast/Business Session.”
- Include a line for registrant’s e-mail address.

### Deadline Information

(Determined by the Host Chapter with Division Board approval.)

|                              |                        |
|------------------------------|------------------------|
| Registration Deadline Date   |                        |
| Cancellation Deadline Date   |                        |
| Charge for Late Registration | \$20 if after xxx date |
| Charge for Late Cancellation | \$20 if after xxx date |
| NO Refund if Cancellation    | If after xxx date      |

### Mailing

- Address labels should be secured from International Headquarters the first week of January. Allow three – four weeks for Headquarters to fill the order. The Division President and Treasurer request these labels. NOTE: these labels will include International Members-at-Large who live in Ohio.
- The mailing date should be **April 1 with a deadline of May 25**, if mailed Bulk Mail. An advance copy mailed First Class should be sent to the Division Board, including Parliamentary Advisor.

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- In addition to all Ohio Division members, a copy of the registration form should be sent to the following:
  - International Executive Director (c/o International Headquarters)
  - International Communications/Publications Manager (c/o International Headquarters)
  - Great Lakes District Director (c/o preferred mailing address)
  - International President (c/o preferred mailing address)
  - International President-Elect (c/o preferred mailing address)
  - All Division Presidents in the Great Lakes District (c/o preferred mailing addresses)

### Registration Lists

- General Chair shall keep the Division Coordinator informed throughout the registration period of the number of registrations received.
- A current list, as of 5:00 pm Tuesday, should be faxed or e-mailed to the Division Corresponding Secretary by 9:00 am Wednesday the week of the Annual Meeting. This would enable the Corresponding Secretary to review the figures and determine if revised certificates need made prior to him/her leaving on Thursday morning for the Annual Meeting.
- General Chair is responsible for ensuring that a copy of the registration lists are provided to the Division Board on Thursday evening when they meet prior to the opening of the Annual Meeting.

### Registration Desk/Hours

- The staffing of the Registration Desk is the responsibility of the Host Chapter.
- The Host Chapter with Division Board approval determines the registration hours. It is highly recommended that the Registration Desk remain open on Friday from 8:00 am until 9:00 pm; and on Saturday from 7:00 am until 9:00 am and reopen at 1:30 pm until 5:00 pm.
- Credentials registration is the responsibility of the Registration/Credentials Committee and usually coincides with Registration hours.

## Attendee's Packet

- Each person attending the Annual Meeting shall receive a registration packet containing (but not limited to):
  - Overall program of complete agenda (see Programs and Printing)
  - Meal tickets for partial registrants only (if needed)
  - Information concerning church services and locations
  - Lists of nearby restaurants, shops, map of city, special places of interest in the city
  - Protocol Booklet, if applicable
  - Evaluation form, prepared and furnished by the Division Coordinator
  - Name badge

## Name Badge

- To be provided to ALL attendees (clear plastic holders preferred).
- Delegate and Alternate badge should include name, CPS and/or CAP designation if applicable, Chapter name, and Delegate or Alternate number.
- Division Officers badge should include name, CPS and/or CAP designation if applicable, Chapter name, city where Chapter is located, Division office, and delegate number.
- International personnel badge should include name and International office and CPS and/or CAP designation if applicable.
- Guests' badge should state GUEST.



## Programs and Printing

- A printed program with numbered pages for the entire Annual Meeting, listing all functions, is to be provided to all members in attendance. It should include, but is not limited to the following:
  - List of all events
  - Times
  - Participants
  - Rules of Order
  - Order of Business
  - Biographical sketches of speakers
  - Biographical sketches of Division Officers, past Division Presidents, Host Chapter officers, Annual Meeting Planning Committee Chairs
  - Letters of welcome from Presidents of the other Great Lakes Districts
  - Annual Reports from Ohio Division Board Officers and Ohio Division Committees
  - Any IAAP personnel and local dignitaries
- A rough draft of the program should be submitted to the Ohio Division Board by: ??
- The Host Chapter designs the cover and arranges for the entire printing job. The cover for the program should be attractive and contain the date and the following:

Ohio Division Annual Meeting  
International Association of Administrative Professionals  
(City), Ohio  
(Theme – Optional)  
(Date)

- Samples of all program design and content layout are to be reviewed and approved by the Division Board.
- The Division President and Division Coordinator **MUST** approve the program prior to final printing.
- Paper selection for ODAM event programs – if the Division President wants special paper to be used, it is very important that this information be provided to the Host Chapter at the site visit meeting, but no later than November 1. This deadline will enable the Host Chapter to purchase the paper and create the first draft of the event programs by the deadline.
- On all printed materials, use the term CHAIR versus CHAIRMAN.

## Ohio Division Annual Meeting Planning Manual

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- Division Corresponding Secretary will create all certificates to be distributed during the Annual Meeting.
- If a Chapter has no Delegate in attendance, the Host Chapter will provide this Chapter's notebook to the Division Coordinator. The Division Coordinator will mail the notebook to the Chapter President. The materials from these binders can be removed and placed in a paper folder – is it not necessary to mail the binder.

## **Favors and Door Prizes**

- Any item that adds to the cost of the Annual Meeting for the membership must have careful consideration. Complete cost breakdown must be given in writing to the Division Coordinator before approval can be granted. If it becomes necessary to eliminate unnecessary items in order to keep costs down, this needs to be done.
- Favors are at the discretion of the Host Chapter.
- Door Prizes (optional) should be available in the Hospitality Suite for pick up or distributed during the Open House.

### **Accommodations**

- General Chair should reserve a suite with a boardroom table and three adjacent rooms for the Division Officers from Thursday (noon) prior to the Annual meeting through Sunday until approximately 3:00 pm.
- General Chair should reserve rooms for any International officers or speakers, as required.
- Some hotels provide rooms for the Division and International officers on a complimentary or discount rate basis.
- General Chair should reserve a meeting room from noon until approximately 3:00 pm for the Past Presidents Council meeting for Sunday afternoon following the Annual Meeting – verify this with the Past Presidents Council.
- General Chair should reserve a meeting room for the Ohio Division Finance Committee (Silent Auction). Finance Committee Chair should notify General Chair of any special needs or particular set-up. This room is needed Thursday afternoon through Sunday noon. Verify times with Finance Committee Chair.

## **Credentials Committee**

- Credentials Committee should be formed as part of the Registration Committee. It will be their responsibility to check the credentials of the Delegate and Alternate representing each chapter at the Annual meeting.
- The Credentials Committee Coordinator will be required to make a report during the Business Session at the Annual Meeting on the number of Delegates and Alternates attending. The Division President will provide appropriate verbiage required for this report to the Credentials Committee Coordinator.
- Ohio Division officers should be listed as Division Delegates. The Division officers should be the first numbered Delegates (D1 – D6). Chapter Delegate numbering would be in sequential order as the Delegate credentials are received. Division Corresponding Secretary will complete a credentials form for all Division Officers.
- The Credentials Coordinator in conjunction with the Registration Coordinator shall see that all Delegates and Alternates badges are properly numbers, i.e. 7D, 8D, 9D, 7A, 8A, 9A, etc. These numbers are assigned as the Delegates send in their registration information.

## Protocol Coordination

- The Protocol Coordinator is responsible for the preparation and placement of Protocol Booklets in the Registration packets for all persons requiring assigned seating during any portion of the Annual Meeting.
- The Protocol Coordinator shall see that all assigned seating tables are properly marked so that they will be easily identified by all attendees.
- The Protocol Coordinator will handle the assigned seating of the Delegates and Alternates during all Business Sessions. The Delegates tables shall be directly in front of the Head Table, with the Alternates seated on either side or directly behind the Delegate area.
- The Protocol Coordinator shall prepare numbered place cards for the Delegate and Alternate tables using the same numbering sequence as assigned to their individual badges. This will enable the Delegates and Alternates to know where each is seated, as well as assisting the Pages in locating attendees. If signs are to be placed on chairs for Delegates and Alternates, be sure the ink will not come off on the attendees' clothes.
- The Protocol Coordinator is responsible for seeing that persons seated at the Head Table are in proper place and lined up (10 minutes prior to the function) according to the seating in the Protocol Booklet. The Protocol Coordinator is responsible for handling this for all functions. Line-ups usually take place at:
  - Opening and Business Sessions (Saturday morning)
  - Recognition Luncheon (Saturday afternoon)
  - Banquet (Saturday evening)
  - Breakfast (Sunday morning)

*Note: Traditionally, rearrangement of the Head Table usually takes place after the Opening Session and just prior to the Business Session on Saturday.*

- It is the responsibility of the Protocol Coordinator to prepare place cards (8 1/2 x 14 and printed on both sides) for the Head Table, which should be readable from the audience.
- Head Table seating will be furnished by the Division President by **April 15** to the General Chair who will provide the information to the Protocol Coordinator.
- The Protocol Coordinator is responsible for checking all meeting rooms **before** each function to be sure everything is in place, name cards are on the Head Table, equipment is on hand, Delegate and Alternate tables are marked, and other special assigned seating areas are marked.

**Meetings With Division Officers**

- General Chair and Host Chapter President should plan to meet with the Board on Thursday evening prior to the start of the Annual Meeting. The Division Coordinator will arrange this meeting with the General Chair.
- On Thursday evening, the General Chair or a Host Chapter Committee member should check with the Division Officers to adjust any special seating notices to be inserted in Registration Packets.
- Thursday evening, the General Chair should provide the Banquet seating chart to the Division Officers to make their selections. Refer to the Banquet information in this section of the Planning Manual for additional information.

**Hospitality**

- A Hospitality Room shall be provided and kept open at appropriate times. This will be a room where members can come to have questions answered, relax and meet other members.
- Provide adequate seating, as well as coffee, tea, water, aspirin, Band-Aids, needle and thread, and similar items available for the members.



## **Speakers / Seminar / CEUs**

- All speakers are selected by the Host Chapter with approval of the speaker and fees by the Ohio Division Board. The Host Chapter should submit at least three, possibly five, speaker recommendations.
- When a speaker is introduced, it is important not to read what is in the bio included in the program materials given to all attendees. It may be necessary to work with the speaker to secure two bios – one for the introduction and one for the program materials.
- The Host Chapter is responsible for applying for CEUs from International for all applicable speakers. The Host Chapter is responsible for providing CEU certificates and CPS/CAP Recertification Point certificates to all applicable attendees.
- Evaluation forms for speakers where CEUs were granted will be provided by Headquarters. It is the Host Chapter's responsibility for completing the necessary paperwork after the Annual Meeting and submitting it to Headquarters by the stated deadline date.
- The Host Chapter is responsible for tabulating the CEU evaluation forms from Headquarters and providing a summary copy to the Division Coordinator. The Division Coordinator will provide a copy to the Division Board. It is important that this assignment be completed by the deadline date given by Headquarters.

## **Trips/Tours**

- All arrangements for fees, travel accommodations, etc., are made by the Host Chapter with approval of the Division Board.
- Tours are to be held at different times than the educational seminar.
- Monies involved on tour events should go to the Division Treasurer.
- **ALL** profits or losses on tour events revert to the Host Chapter.

**Exhibits/Exhibitors**

- Should consist of a wide variety. Examples are: office equipment, office suppliers, business-oriented items, personal, Chapters, etc.
- Division Committees receive a free space. However, they should share a table with another Committee.

## **Open House (Friday)**

- Suggested time for the Open House is 7:00 pm – 10:00 pm.
- Host Chapter will determine the activity – budget permitting. Every effort should be made to get the members to mix.
- Light refreshments may be provided and a cash bar considered. If a meal is to be provided, it is recommended that this be an optional event for the attendees.
- Introductions (subject to approval of Division President):
  - General Chair or designee will introduce Ohio Division Chair of Committee on Nominations who will introduce the candidates for Division offices
  - The Division President will introduce the current Board and any International personnel in attendance
  - All officers, or International personnel, are introduced by rank, with the highest ranking officer introduced last

## **Opening and Business Session**

### **Equipment and Facilities**

- Division banner – Division Recording Secretary is responsible for providing. The banner is hung – not posted.
- Small clock for podium – Division President to provide. It is recommended that the Host Chapter verify this with the Division Coordinator.
- Stop watches – Division Recording Secretary is responsible for providing.
- Head Table should be skirted and on risers (two or three foot, but no less than one foot risers).
- A lectern with microphone should be on the Head Table.
- The Head Table should have glasses and pitchers of ice water.
- Floor mikes – one, possibly two needed (check on what is preferred by Board).
- Flag – United States flag to be displayed. State flag is optional.
- Place Cards on the Head Table should be printed on both sides so they can be read from the audience and by those sitting at the Head Table. Protocol Coordinator is responsible for these.
- Head Table seating will be furnished to the General Chair by the Division Coordinator. The Division President is responsible for the Head Table seating assignments.
- Protocol Coordinator is responsible for the preparation and placement of Protocol Booklets in Registration packets.

*Note: Rearrangement of the Head Table usually takes place after the Opening Session and just prior to the Business Session.*

### Seating Arrangements for Delegates and Alternates

- Round table style seating is preferred with separate tables for Delegates and Alternates. However, depending on the logistics of the hotel, classroom style seating is permitted, again with separate tables for Delegates and Alternates.
- Tables should be designated “Delegates” and the tables for the Alternates should be located as close as possible to the Delegates’ tables.

### Credentials Committee

- Tables and chairs should be near the Registration area.
- Sign: CREDENTIALS CHECK IN

### Proceedings

- Call to Order.
- Invocator (selected by the Division President).
- Presentation of Colors – Host Chapter is responsible for securing a group to present colors, i.e., Scouts, ROTC Unit, Navy, Marine, Army Reserve Unit, Veterans organization, etc.
- National Anthem – Host Chapter to decide if it is to be sung by a soloist or the assembly and arrange for appropriate accompaniment, etc. The Division President should advise the assembly if they are to participate in the singing.
- Welcomes:
  - Host Chapter President gives the Welcome.
  - The Chapter President or Delegate from the Host Chapter for the following year’s event gives the Response.
  - The Host Chapter should request any proclamations.
  - Representative from the hotel.
  - The Host Chapter should also contact the Mayor, convention bureau, or anyone else they feel would be appropriate to provide welcome comments.

Miscellaneous

- General Chair appoints at least four Pages. These may be Host Chapter members, neighboring Chapter members or other IAAP member attendees. The names of the Pages should be included in the Program Booklet.
- Tellers (usually three) and Timers (usually two) are appointed by the Division President. Division Coordinator will notify the General Chair of appropriate items and special seating needed by these individuals. The names of the Tellers and Timers should be included in the Program Booklet.
- The Ohio Division Committee on Nominations is responsible for providing ballots.

## **Recognition Luncheon**

- Physical Arrangements:
  - Head Table – elevated on risers and skirted
  - Lectern and mike
  - Place cards, readable to audience and Head Table
- Menu – selected by the Host Chapter with Division approval (allow for food allergies when selecting menu).
- Invocator – Selected by the Division President.
- Program (optional) agenda furnished by the Division President.
- Reserved seating near front for new CPS, CAP, and Recertified recipients.
- Reserved seating near front for Past Presidents Scholarship recipients, guests, and Past Presidents.
- Event Program – only print the names of those new CPS, CAP, and Recertified recipients who will attend. Names will be provided by the Division Corresponding Secretary.
- The Division Corresponding Secretary shall prepare certificates of recognition for those CPS, CAP, and Recertified members who have certified or recertified since the previous annual meeting, and are registered to attend the current Annual Meeting.



## **Worship Service (Optional)**

- Providing a worship service is at the discretion of the Host Chapter – fund permitting.
- If an ecumenical service is planned, the Host Chapter must secure approval from the Catholic Bishop of the diocese for this service to satisfy the Mass obligation of the Catholic members.  
*If the ecumenical service does not satisfy the Catholic Mass obligation, it should be noted to the attendees.*
- The following arrangements should be made whether the service(s) is ecumenical or nondenominational:
  - Arrange for a room(s). Approximately 50-75 people usually attend
  - Contact minister and/or priest to make necessary arrangements
  - Pianist and/or soloist (optional)
  - A printed order of worship (optional)
  - A small worship center, with cross, candles or flowers (optional)
- If no church service is held at the hotel, a list of nearby churches with the times of their services should be included in the registration packet.

## **Banquet**

### **Social Time**

- Saturday evening prior to Banquet, not to exceed one hour.
- Cash bar should be available.
- Chairs and tables, if possible, should be arranged to avoid congested areas around serving stations.
- Music during this period is optional. Actual cost must be included in budget and approved by the Division Board before final commitment is made.

### **Equipment and Facilities**

- Head Table should be skirted and on risers with steps on each end (two or three foot, but no less than one foot risers). A lectern with microphone should be on the Head Table. The Head Table should have glasses and pitchers of ice water.
- Place cards on the Head Table should be printed on both sides so they can be read from audience and by those sitting at the Head Table. Protocol Coordinator is responsible for these.
- Riser with steps for Installation Ceremony. The President-Elect is responsible for notifying the Division Coordinator if other items are needed (i.e., table, flowers, candles, etc.).
- The menu is selected by the Host Chapter with Division Board approval (allow for food allergies when selecting menu).
- Favors for attendees are at the discretion of the Host Chapter. If favors are provided, the Division Board must give approval.
- Invocator is selected by the Division President.
- Name badges are not necessary for guests attending the banquet – name badges are not worn to this event.

## Ohio Division Annual Meeting Planning Manual

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- Entertainment or speaker is at the discretion of the Host Chapter. If entertainment or a speaker is utilized, the Division Board must give approval.
- Protocol Chair usually makes introductions as those sitting at the head table enter the room. The Division President will make this decision.
- Program (optional) – agenda furnished by the Division President.

### Seating

- Thursday evening, the General Chair should provide the banquet-seating chart to the Division officers to enable them to select seating for their guests. The current Division President and incoming President have first choice of seating assignments.
- Division Past Presidents should have reserved seating.
- Banquet seating for Award for Excellence recipient – seats should be reserved for only the company representative, his/her guest if applicable, and possibly the chapter president. The intent is to keep it a surprise for the members, and especially the winning chapter members. The ODAM budget is NOT responsible for these reservations.
- Tables for special personnel in attendance, i.e., International officers/personnel, attendees from other Divisions, Award for Excellence recipient and guests, etc. The Division President should provide this information to the General Chair.

### Installation Ceremony

- Installing officer is selected by the President-Elect.
- Check with Division Coordinator for any special arrangements other than a riser with stairs, i.e., table, flowers, candles, etc. If these items are not complimentary of the hotel, they must be purchased by the incoming President.

## Receiving Line

- This is the decision of the incoming President.
- Location should be noted in the program.
- Assembly should be instructed to remain seated until those at the head table have left the room.

## **Memorial (OMEGA) Service**

- A small table in front and skirted.
- A vase (weighted in the bottom) should be on the table to be used to insert flowers for the Omega members. Flowers are to be provided by the Host Chapter – the Division President determines the color and type.
- Candle and lighter should be on the table – and is to be provided by the Host Chapter.
- The Host Chapter is responsible for providing a printed list of the Omega members. Division Corresponding Secretary will provide this information to the General Chair.
- Music – if requested by the Division President, should be an appropriate song. The Division Friendship Choir usually handles this. It is the Division President's responsibility to obtain a director for the Friendship Choir.
- Division President conducts this service.

## **Breakfast**

- Menu – Selected by the Host Chapter with Division Board approval.
- Invocator – Selected by the Division President.
- Speaker (motivational) – Responsibility of the Host Chapter with Division Board approval.
- Physical arrangements:
  - Head table – elevated on risers and skirted
  - Lectern and mike on head table
  - Place cards, readable to audience and at head table

## **Print Media Competition Guidelines**

- The Print Media Competition is the responsibility of the Division President-Elect. The President-Elect may ask the General Chair for assistance by the Host Chapter in securing judges and/or creating the display of entries in a room selected by the General Chair. Prior to or at the Site Visit, the President-Elect will advise the General Chair if any assistance is needed.
- The ODAM Host Chapter is eligible to enter the Print Media Competition.

## **Evaluations**

- General evaluation forms are created by the Division Coordinator.
- The Host Chapter places a copy in the printed materials.
- Host Chapter collects evaluation forms and sends them to the Division Coordinator.
- The Division Coordinator will tabulate, summarize, and distribute the results by the middle of July.
- The Division Coordinator will send a copy of all evaluations to:
  - Division officers in office during the annual meeting
  - Newly elected Division officers
  - ODAM Chair
  - ODAM Chair for the next two annual meetings



## Ohio Division Annual Meeting Planning Manual

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### Time Line

| DUE DATE                                       | TASK  |
|--|---|
| Immediately after invitation is accepted       | Confirm arrangements with meeting facility: number of guest rooms and meeting rooms.  |
| Two years before meeting                       | Secure Planning Manual from Division President (manual will be reviewed annually by the Division Board).<br>Begin to set up committees and start preliminary planning.<br><b>Begin fundraising.</b>   |
| One year before meeting                        | Issue invitation at the Annual Meeting to attend meeting in your city.  |
| In May before September Board Meeting          | Make hotel reservations for Division Officers for September Board Meeting (Site Visit Meeting) and for Annual Meeting. Division Coordinator will confirm dates and needs for Site Visit.  |
| August 15                                      | Tentative budget to Division Coordinator  |
| One week prior to September Site Visit Meeting | General Chair to submit agenda and Site Visit Manual to all attendees – can be sent via the Division Coordinator.   |
| August/September                               | General Chair and Host Chapter should meet with hotel personnel at least two weeks in advance of the Site Visit Meeting. Purpose will be to alleviate long meetings and to finalize individual committee needs/items prior to the Site Visit Meeting.<br>General Chair to inform Division Coordinator of meeting outcome to make any needed revisions to the Site Visit Meeting agenda. |

## Ohio Division Annual Meeting Planning Manual

| DUE DATE  | TASK   |
|---|--|
| September   | <p>General Chair and Committee Coordinators meet with Division Board at Annual Meeting Host Chapter site to discuss plans/budget. (Hotel facilities/banquet manager should be included for a short session.)</p> <p>Items to provide Division Board:</p> <ul style="list-style-type: none"> <li>• Sample of favor planned for banquet</li> <li>• Sample of program cover(s)</li> <li>• Names and topics of proposed speakers, entertainers, ministers, etc.</li> <li>• Names of members appearing on program (invocation, soloist, pianist, etc.) if available.</li> <li>• Name of Color Guard unit (if known)</li> <li>• Theme(s)</li> <li>• Open House plans</li> <li>• Exhibitors (number and type)</li> <li>• Hospitality plans</li> <li>• Registration procedures</li> </ul> <p><i>Note: As much as possible of the above should be presented at the meeting so plans may be finalized.</i></p> |
| August – April  | Submit announcements for the <i>Buckeye Broadcaster</i> by the 20 <sup>th</sup> of each month to the Division Corresponding Secretary.   |
| September – January   | Secure signed contract and function sheet for each event from the meeting facility. Forward copies to the Division Coordinator.  |
| January 1   | Request that labels from International Headquarters for mailing to all Division members be ordered.<br>Division President and Treasurer will place the order.  |
| January – June  | Confirm speakers, exhibitors, etc. Copy to Division Coordinator.   |
| February 1  | Contact Division Treasurer for any new members' names and addresses since receiving labels from International.   |
| April 1   | Mail registration materials.   |
| April 15 – June 1   | Have programs printed.   |
| June ____<br>(Thursday evening<br>prior to Annual<br>Meeting) | <p>Have dinner with Division Officers (General Chair and Host Chapter President).</p> <p>Provide Division Officers with registration materials, including registration list and programs.</p> <p>Check with Division Officers for additional materials to be included in registration packets.</p> <p>Check with Division Officers for any last minute changes in head table line-up (Protocol Coordinator).</p>   |

## Ohio Division Annual Meeting Planning Manual

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| DUE DATE   | TASK  |
|--|---|
| June _____<br>(Friday, Saturday,<br>Sunday of Annual<br>meeting) | Physical arrangements: Chair to check final arrangements with meeting facility. Protocol Coordinator is responsible for ensuring microphones, risers, lecterns, tables, etc. are on hand prior to each event.<br>Check registration area to be sure all materials are available and area is well identified, etc.<br>Check credentials area to be sure all materials are available and area is well identified, etc.<br>Check meeting rooms <b>before</b> each function to be sure everything is in place: name cards are on Hhead Table, equipment is available, Delegates and Alternates tables are marked (Protocol Coordinator). Protocol Coordinator is responsible for lining up people seated at the Head Table 10 minutes prior to each function. |
| Immediately after<br>Annual Meeting                              | Have computer and printer used by Division Officers returned.<br>Write "Thank You" letters (copy to Division Coordinator) to: Facility personnel, speakers, etc.  |
| Within 60 days after<br>Annual Meeting                           | Submit financial report to Division Coordinator.<br>Division Coordinator will distribute copies to the entire Board.  |
| No later than August 1   | Forward files to next year's Ohio Division Annual meeting General Chair.  |

**Example Forms, etc.**

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**Ohio Division Annual Meeting Planning Manual**

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Expense Voucher

**ODAM 2004 EXPENSE VOUCHER**

Date: \_\_\_\_\_

Committee Incurring Expenses: \_\_\_\_\_

Make Check Payable to:

|          |  |
|----------|--|
| Name:    |  |
| Address: |  |
|          |  |
|          |  |

Description:

|       |    |
|-------|----|
|       |    |
|       |    |
|       |    |
|       |    |
| TOTAL | \$ |

\_\_\_\_\_  
*Committee Chair or Officer*

Date Paid: \_\_\_\_\_

\_\_\_\_\_  
*Treasurer*

Check No: \_\_\_\_\_

\_\_\_\_\_  
*ODAM Chair*

\_\_\_\_\_  
*OD Vice President*

\_\_\_\_\_ To be reimbursed by Ohio Division  
\_\_\_\_\_ Downtown Cleveland Chapter Expense

Invoice, sales slip, or other documentation is to be attached to voucher.

## Ohio Division Annual Meeting Planning Manual

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### Evaluation Form

**2004 OHIO DIVISION ANNUAL MEETING**  
**June 25-27, 2003**  
**Renaissance Cleveland Hotel**  
**Cleveland, Ohio**

#### EVALUATION FORM

To ensure the success of future Ohio Division Annual Meetings, we would appreciate you taking a few minutes to complete this brief evaluation.  
 Your input will help us improve future meetings. Thanks!

| DESCRIPTION                                     | EXCELLENT | VERY GOOD | GOOD | FAIR | POOR | N/A |
|---|-----------|-----------|------|------|------|-----|
| Registration Form                               |           |           |      |      |      |     |
| Conference Manual                               |           |           |      |      |      |     |
| Credentials Packet                              |           |           |      |      |      |     |
| Friday Afternoon Seminar<br>Kay Stephan         |           |           |      |      |      |     |
| Trips and Tours                                 |           |           |      |      |      |     |
| Friday Statewide LAN Meeting                    |           |           |      |      |      |     |
| Friday Open House                               |           |           |      |      |      |     |
| Vendor Tables                                   |           |           |      |      |      |     |
| Friday Night Entertainment<br>PEARL Jam Factory |           |           |      |      |      |     |
| Delegates' Briefing                             |           |           |      |      |      |     |
| Saturday Morning Speaker<br>Sam Johnson         |           |           |      |      |      |     |
| Business Session                                |           |           |      |      |      |     |
| Good of the Order                               |           |           |      |      |      |     |
| Recognition Luncheon                            |           |           |      |      |      |     |
| Saturday Afternoon Seminar<br>Mary Faktor       |           |           |      |      |      |     |
| Saturday Night Banquet                          |           |           |      |      |      |     |
| Advanced Banquet Seating                        |           |           |      |      |      |     |
| Installation Ceremony                           |           |           |      |      |      |     |
| Awards Ceremony                                 |           |           |      |      |      |     |

## Ohio Division Annual Meeting Planning Manual

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| DESCRIPTION                                 | EXCELLENT | VERY GOOD | GOOD | FAIR | POOR | N/A |
|---|-----------|-----------|------|------|------|-----|
| Reception                                   |           |           |      |      |      |     |
| Saturday Night Entertainment<br>Night Moves |           |           |      |      |      |     |
| Sunday Breakfast                            |           |           |      |      |      |     |
| Memorial Service                            |           |           |      |      |      |     |
| Sunday Speaker<br>Scott Bea, Psy.D.         |           |           |      |      |      |     |
| Hospitality Room                            |           |           |      |      |      |     |
| Did your employer pay your registration?    | YES       |           |      | NO   |      |     |
| First Timer Information Mailing             |           |           |      |      |      |     |
| ADDITIONAL COMMENTS                         |           |           |      |      |      |     |
|   |           |           |      |      |      |     |
|   |           |           |      |      |      |     |
|   |           |           |      |      |      |     |
|   |           |           |      |      |      |     |

You may drop off your evaluation form either at the back of the meeting room,  
in the hospitality room, or mail/fax to Carrie Lowe CPS.

Carrie Lowe CPS  
NiSource Business Services  
200 Civic Center Drive  
Columbus, OH 43215  
(Fax) 614 – 460 – 4265

Thank you and have a safe trip home!

## **Procedures to Bid for Ohio Division Annual Meeting**

Three years prior to the proposed Annual Meeting, and no later than February 1, the Chapter should secure the following documents:

- Executed Bid Form signed by both the Chapter representative and the representative for the proposed meeting facility.
- Floor plan of the meeting facility with specific areas to be used for each function clearly identified.

Following the meeting with facility management, and after completion of Bid Form by Host Chapter representative, the following should be completed:

- Send signed originals of the items above to the Ohio Division President.
- The Ohio Division President will forward copies of the above items to the Ohio Division Board.
- Upon receipt of the materials, the Division Board will review the Bid and the Division President will notify the Host Chapter making such Bid, no later than March 15, that the facilities are suitable for an Annual Meeting.

If deemed necessary, the Division Board may appoint a Division Officer to visit the proposed site to be assured that space and equipment are available.

If more than one chapter submits a bid for the same Annual Meeting, the bids will be announced in the April issue of the *Buckeye Broadcaster*.

Selection of meeting site will be made by vote of delegates attending the Annual Meeting.

The Division Board reserves the right to waive deadline dates noted above as might be required.



**Ohio Division Annual Meeting Planning Manual**

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**Bid For Ohio Division Annual Meeting**

This is to advise that the undersigned parties have reviewed the items set forth in the Bid and are agreeable that all conditions noted are fulfilled.

|   |   |
|---|---|
| <hr/> <p>Name of Meeting Facility</p>                               | <hr/> <p>Name of Host Chapter</p>                               |
| <hr/> <p>By:<br/>(Signature of Meeting Facility Representative)</p> | <hr/> <p>By:<br/>(Signature of Host Chapter Representative)</p> |
| <hr/> <p>Title</p>  | <hr/> <p>Title</p>  |
| <hr/> <p>Date:</p>  | <hr/> <p>Date:</p>  |

**Submitted By:**

|                |       |
|----------------|-------|
| Chapter        | <hr/> |
| Location       | <hr/> |
| Address        | <hr/> |
| President      | <hr/> |
| Business Phone | <hr/> |
| Fax            | <hr/> |
| E-mail         | <hr/> |

**Meeting Place Address and Specifics:**

|                    |       |
|--------------------|-------|
| Location Name      | <hr/> |
| Address            | <hr/> |
| Business Phone     | <hr/> |
| Fax                | <hr/> |
| E-mail             | <hr/> |
| Contact @ Facility | <hr/> |
| Comments           | <hr/> |
|                    | <hr/> |
|                    | <hr/> |

## Hotel Accommodation Information

Approximately 210 members utilize sleeping rooms during the weekend of Annual meeting. The following accommodations are generally requested:

| <b>Room Type</b>    | <b>Number Available</b> | <b>Sleeps</b> | <b>Rates (if available)</b> | <b>Comments</b> |
|---------------------|-------------------------|---------------|-----------------------------|-----------------|
| Single              |                         |               |                             |                 |
| Double w/Single Bed |                         |               |                             |                 |
| Double w/Double Bed |                         |               |                             |                 |
| Double w/King Bed   |                         |               |                             |                 |
| Suites (Type)       |                         |               |                             |                 |
| Roll-aways          |                         |               |                             |                 |

## Annual Meeting – Board Members’ Requirements

- Three or Four sleeping rooms with two double beds in each sleeping room.
- Meeting Room for Board meeting on Thursday.
- Meeting Room for Board meeting on Sunday after Annual Meeting.

## Site Visit Meeting – Requirements

- Meeting Room to include Ohio Division Board and Host Chapter.
- Ohio Division Board will use this same room for the remainder of the day.

## **Miscellaneous**

- Rates shown above: Convention or Regular Room Rates?
- If Regular Room Rates, what is convention rate?
- Reservation Cards provided/required by Hotel?
  
- Parking – Charged or Complimentary?
- If parking fees are charged, what is the rate?
- Permitted to come and go at will?
  
- Major Credit Cards accepted?
- Which ones?
- Personal checks accepted?

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- Are any of the following available in the rooms?

|                             |                    |
|-----------------------------|--------------------|
| Refrigerators? _____        | Which Rooms? _____ |
| Coffee Makers? _____        | Which Rooms? _____ |
| Hair Dryers? _____          | Which Rooms? _____ |
| Ironing Board & Iron? _____ | Which Rooms? _____ |
| Computer Hookups _____      | Which Rooms? _____ |

### Events and Space Requirements

| Event   | Area / Room | Comments |
|---|-------------|----------|
| Registration (Friday – Sunday)  |             |          |
| Friday Afternoon Seminar<br>(2:00 pm – 4:00 pm)   |             |          |
| Hospitality (Friday – Sunday)   |             |          |
| Open House (Friday Evening)   |             |          |
| Exhibitors (Friday evening<br>during Open House)<br>(10 – 20 depending upon<br>space available) |             |          |
| Saturday Business Session<br>(7:30 am – Noon)   |             |          |
| Saturday Recognition<br>Luncheon<br>(Noon – 2:00 pm)  |             |          |
| Saturday Seminar<br>(2:00 pm – 4:00 pm)   |             |          |
| Saturday Banquet / Reception<br>(6:00 pm – 11:30 pm)  |             |          |
| Saturday and/or Sunday<br>Worship Services<br>(Optional)  |             |          |
| Sunday Brunch & Business<br>Session<br>(7:30 am – Noon)   |             |          |

Meal Facilities (other than those planned for meeting)

|           | <b>Hours Served</b> | <b>Capacity</b> | <b>Area</b> |
|-----------|---------------------|-----------------|-------------|
| Breakfast |                     |                 |             |
| Lunch     |                     |                 |             |
| Dinner    |                     |                 |             |

**Miscellaneous**

- May members for their individual rooms bring in snacks?
- May members for the Hospitality Room bring in snacks?
- May snacks be brought in by members for Saturday after the Banquet / Reception?

Personnel

Sufficient personnel should be available to assist members promptly and efficiently. The following are pertinent to assuring this.

- Waiters/Waitresses to serve 200-250 persons at each meal function.
- At least two bartenders for Social/Reception on Saturday evening.
- Electricians and other personnel – will they be available during all sessions to handle equipment, room temperature, lighting, etc.
- Extra fee?

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### Equipment Requirements

| <b>Item(s)</b>  | <b>Cost</b> |
|---|-------------|
| Round Tables for all meal functions to seat 8                                       |             |
| Bulletin Boards for Hospitality Room – at least 4                                   |             |
| Tables for use at Open House, Hospitality Room, Print Media, etc.                   |             |
| Lectern with microphone for all functions   |             |
| Floor microphones for Business Session  |             |
| One microphone (optional) for Installation Ceremony                                 |             |
| Riser for all functions   |             |
| Lavaliere Microphone (optional) for Speakers  |             |
| Overhead Projector and Screen (optional)  |             |
| On-site copier and computer with printer for use by Host Chapter and Division Board |             |

**Hints**

Thursday – the Board chooses their banquet tables. Make sure the waite staff knows which tables to serve first so the board can eat and be back at the head table on time.

Make a motion to waive the reading of the Amendments.

Kleenex at the Podium – especially Sunday.

Publicize Annual Meeting outside of the Division (i.e., Great Lakes District). Intrest may increase from other states since we don't have a district conference anymore.