



## 20\_\_ FBINAA Annual Training Conference

July \_\_ - \_\_, 20\_\_

City, State

### Conference Functions & Assignments Checklist

This checklist is designed to clarify the expected functions and assignments for the Co-Host Committee and the Conference Planning staff.

Conference Functions	Timeline	Set/ Done	Co-Host Committee	National Planning Staff
<b><u>Venue Site Selection</u></b> Recommend venues for meetings, special events and destinations	4-6 years prior		X	
<b><u>Venue Site Negotiation</u></b> Negotiate terms and conditions for venue contracts and manage during planning process and execution	4-6 years prior			X
<b><u>Event Venue Contracts</u></b> Negotiate terms and conditions for special event venue contracts and manage during planning process and execution	2-4 years prior		X	X
<b><u>Consult and Advise</u></b> Committee and national staff share information and planning tools to begin the planning process	24 months prior through post conference		X	X
<b><u>Committee Planning Meetings</u></b> Coordinate meetings, agenda, lead meetings and manage follow up actions	24 months prior through post conference		X	
<b><u>Committee Structure</u></b> Set up Co-Host Committee to include executive committee and function heads	24 months prior through post conference		X	
<b><u>Sponsorship Opportunities Packet</u></b> Prepare details for sponsor levels, functions to sponsor & benefits	24 months prior			X
<b><u>Consolidated Planning Guide</u></b> Distribute guide to Committee (includes draft operational plans, planning timeline, budget, draft agenda and venue details)	21 months through post conference			X
<b><u>Operational Plans</u></b> Committee and staff complete operational plans	18 months through post conference		X	X
<b><u>Document Management</u></b> Create and manage web-based group site to house and share planning documents	18 months through post conference			X
<b><u>Budget</u></b> Create budget from standard template	18 months through post conference		X	X
<b><u>Financial Management and Reporting</u></b> Track financial transactions and manage actual to budget report	18 months through post conference			X

<b>Conference Functions</b>	<b>Timeline</b>	<b>Set/ Done</b>	<b>Co-Host Committee</b>	<b>National Planning Staff</b>
<b><u>Income – Receivables</u></b> Receive conference income as stipulated on the approved budget (line items identified as tier three)	18 months through post conference		X	
<b><u>Income – Receivables</u></b> Receive conference income as stipulated on the approved budget (line items identified as tier one and two)	18 months through post conference			X
<b><u>Expenses – Payables</u></b> Pay expenses from entity account for expenses allocated by budget tier one and two funds	18 months through post conference			X
<b><u>Service Contracts</u></b> Approve and enter into contracts with providers for services allocated by budget tier three funds	18 months through post conference		X	
<b><u>Service Contracts</u></b> Approve and enter into contracts with providers for services allocated by budget tier one and two tier funds	18 months through post conference			X
<b><u>Exhibition Plan and Opportunities Package</u></b> Prepare details for exhibit booths, promotional opportunities & benefits	18 months prior			X
<b><u>Conference Website</u></b> Acquire domain, design and develop website, and manage website content and functions	12 months prior through post conference			X
<b><u>Training &amp; Presentation Call for Proposals</u></b> Launch call for proposals online submission site, recruit training opportunities and collaborate with committee training selection team for final selection of sessions	18 months prior			X
<b><u>Venue Site Visits</u></b> Coordinate at least one site visit with committee and planning staff to review logistics and planning details	18 months prior		X	X
<b><u>General Conference Profile</u></b> Prepare the general profile under the direction of the Co-Host Committee (including registration fees, goals & objectives, meeting space assignment)	18 months prior			X
<b><u>Sponsorship Recruitment and Acquisition</u></b> The Co-Host Committee, planning staff, Executive Board and Executive Office staff all team to recruit and acquire sponsors for the conference (focus on contacts at the local Chapter and Section level, national/strategic sponsors and new acquisitions)	15 months prior through post conference		X	X
<b><u>Sponsorship Support</u></b> Coordinate benefit fulfillment, manage database, and coordinate sponsor on-site needs and inquiries	15 months prior through post conference			X

<b>Conference Functions</b>	<b>Timeline</b>	<b>Set/ Done</b>	<b>Co-Host Committee</b>	<b>National Planning Staff</b>
<b><u>Exhibitor Recruitment and Acquisition</u></b> The Co-Host Committee, planning staff, Executive Board and Executive Office staff all team to recruit and acquire vendors for the conference exhibition (focus on contacts at the local Chapter and Section level, national and international vendors and new acquisitions)	15 months prior through post conference		X	X
<b><u>Exhibitor Support</u></b> Coordinate benefit fulfillment, manage database, and coordinate exhibitor on-site needs and inquiries	15 months prior through post conference			X
<b><u>Promotions &amp; Marketing Schedule</u></b> Prepare details for promotional materials (electronic brochure, eBlasts) and schedule for marketing	12 months prior			X
<b><u>Housing Schedule</u></b> Prepare details for how accommodations will be provided to attendees, comps, committee, executive board and VIPs	9 months prior			X
<b><u>Conference Evening Event Schedule(s)</u></b> Prepare details for the main conference evening events (Welcome Reception, President's Reception, Family Night, and Gala Banquet)	9 months prior		X	
<b><u>Printing &amp; Program Schedule</u></b> Prepare details for design and development of the printed conference program and other materials	9 months prior			X
<b><u>Food &amp; Beverage Schedule</u></b> Prepare details for food and beverages by function	9 months prior			X
<b><u>Transportation Schedule</u></b> Prepare details for airport transfers, event transportation and parking	9 months prior		X	
<b><u>Giveaways Schedule</u></b> Prepare details for attendee giveaway (delegate bag/gift, spouse bag/gift, child bag/gift) and prize giveaways	9 months prior		X	
<b><u>Ceremonies and Business Meetings Schedule</u></b> Prepare preliminary details for the opening ceremonies, closing ceremonies, Gala banquet, business meetings and other similar functions	9 months prior			X
<b><u>Activities &amp; Excursions Schedule</u></b> Prepare preliminary outline of family activities and excursions to be offered during the conference	9 months prior		X	
<b><u>Youth Center and Activities Schedule</u></b> Prepare details for how the youth center will function (including preliminary activities and events)	9 months prior		X	

<b>Conference Functions</b>	<b>Timeline</b>	<b>Set/ Done</b>	<b>Co-Host Committee</b>	<b>National Planning Staff</b>
<b><u>Executive Board – Co-Host Committee Dinner</u></b> Design, plan and execute dinner	9 months prior through post conference			X
<b><u>Executive Board Support</u></b> Coordinate the Board meetings, special events and special needs for the Executive Board	9 months prior through post conference			X
<b><u>Venue Logistics Planning</u></b> Manage logistics and orders with venue (conference center and hotels)	9 months prior through post conference			X
<b><u>Security Schedule</u></b> Prepare details for how the command center will function	9 months prior		X	
<b><u>Volunteer Schedule</u></b> Prepare details for how volunteers will assist in the conference (including positions, preliminary assignments)	9 months prior		X	
<b><u>Conference Help Center</u></b> Set up and manage the call-in center to receive and respond to questions and requests for assistance	9 months prior through post conference			X
<b><u>Rooming/Accommodations Coordination</u></b> Execute the housing plan, manage the rooming block & rooming lists	9 months prior through post conference			X
<b><u>Evening Events Management</u></b> Manage logistics and coordinate details; manage BEOs with venue; national staff to collaborate on final guarantee count	9 months prior through post conference		X	
<b><u>Conference Program Agenda</u></b> Prepare and update agenda	9 months prior through post conference			X
<b><u>Speaker and Session Support</u></b> Coordinate speaker needs and session logistics	9 months prior through post conference			X
<b><u>Gifts and Giveaways</u></b> Select and acquire giveaways	9 months prior through post conference		X	
<b><u>Registration – Online</u></b> Manage registration process and website with provider, manage database, and respond to registration inquiries	9 months prior through conference			X
<b><u>Exhibition Logistics Coordination</u></b> Manage the logistics with the selected service provider and execution of the conference exhibition	6 months prior through post conference			X
<b><u>Presentation Materials and Handouts</u></b> Manage logistics and coordinate duplication and recording services	6 months prior through post conference			X
<b><u>Presentation Management</u></b> Manage logistics and coordinate production with technical services provider and speakers	6 months prior through post conference			X
<b><u>Ceremonies – Performances and Local Groups</u></b> Coordinate performances for Opening Ceremonies, Closing Ceremonies	6 months prior through post conference		X	

<b>Conference Functions</b>	<b>Timeline</b>	<b>Set/ Done</b>	<b>Co-Host Committee</b>	<b>National Planning Staff</b>
<b><u>Delegate Hospitality and Travel Assistance</u></b> Manage hospitality and greeting of attendees and provide “ambassadors” during conference (i.e. airport transfers, event greeting, special delegate needs)	6 months prior through post conference		X	
<b><u>Food and Beverage Management</u></b> Manage logistics and coordinate details; manage BEOs with venue	6 months prior through post conference			X
<b><u>Technical Production Services</u></b> Prepare specifications, solicit proposals, and manage logistics and details	6 months prior through post conference			X
<b><u>Conference Program Brochure</u></b> Manage logistics and coordinate details	6 months prior through post conference			X
<b><u>Decorative</u></b> Manage logistics and coordinate details	6 months prior through post conference			X
<b><u>Entertainment</u></b> Solicit, select and manage performers	6 months prior through post conference		X	
<b><u>Delegate and Attendee Supplies</u></b> Manage logistics and coordinate details	6 months prior through post conference			X
<b><u>Daily Attendee Communications</u></b> Manage logistics and coordinate details (i.e. eBlasts, electronic newsletter)	6 months prior through post conference			X
<b><u>Registration – On Site</u></b> Manage on-site registration process and coordinate with FBI staff and volunteers	6 months prior through post conference			X
<b><u>Shipping and Receiving</u></b> Manage logistics and coordinate details	6 months prior through post conference			X
<b><u>Family Activities and Tours</u></b> Manage production and direct logistics	6 months prior through post conference		X	
<b><u>Youth Activity Center</u></b> Manage production and direct logistics	6 months prior through post conference		X	
<b><u>Welcome Reception</u></b> Coordinate logistics and manage event during conference	6 months prior through post conference		X	
<b><u>President’s Reception</u></b> Coordinate logistics and manage event during conference	6 months prior through post conference		X	
<b><u>Family Night</u></b> Coordinate logistics and manage event during conference	6 months prior through post conference		X	
<b><u>Golf Tournament</u></b> Confirm off-site contracts, coordinate logistics and manage event	6 months prior through post conference		X	
<b><u>Pistol Shoot</u></b> Confirm off-site contracts, coordinate logistics and manage event	6 months prior through post conference		X	
<b><u>5K Run</u></b> Confirm off-site contracts, coordinate logistics and manage event	6 months prior through post conference		X	

Conference Functions	Timeline	Set/ Done	Co-Host Committee	National Planning Staff
<b><u>Motorcycle Ride</u></b> Confirm off-site contracts, coordinate logistics and manage event	6 months prior through post conference		X	
<b><u>Women's Graduate Breakfast</u></b> Coordinate details and manage event	6 months prior through post conference		X	
<b><u>Transportation and Parking Services</u></b> Confirm contracts, coordinate logistics and manage services	6 months prior through post conference		X	
<b><u>Security and Command Post</u></b> Coordinate logistics and manage command center	6 months prior through post conference		X	
<b><u>Store Operations</u></b> Coordinate logistics and manage store	6 months prior through post conference			X
<b><u>Charity Support – Silent Auction</u></b> Manage solicitations, acquisition and logistics for auction	6 months prior through post conference		X	
<b><u>Elections</u></b> Direct and coordinate logistics during conference	6 months prior through post conference			X
<b><u>Signage</u></b> Manage logistics and coordinate printing	6 months prior through post conference			X
<b><u>Conference Supplies and Equipment</u></b> Manage logistics and coordinate details	6 months prior through post conference			X
<b><u>Photography Services</u></b> Order and coordinate photography services	6 months prior through post conference		X	
<b><u>Media Relations</u></b> Manage media relations if needed	6 months prior through post conference		X	
<b><u>Complimentary Room Assignment</u></b> Assign contractual guestroom comps as desired and advise planning staff to incorporate in accommodations plan	3 months prior through post conference		X	X
<b><u>On-Site Committee Coordination</u></b> Manage and direct committee and other law enforcement staff to serve as Ambassadors and hosts for conference	During conference		X	
<b><u>On-Site Planning Staff</u></b> Manage and direct planning staff to coordinate the logistics and services	During conference			X
<b><u>On-Site Volunteer Coordination</u></b> Manage resources, solicit and train volunteers, and direct efforts to assist the Committee and planning staff in the execution of the conference	During conference		X	
<b><u>Evaluation</u></b> Prepare evaluation tool and manage responses and final report	Post Conference			X
<b><u>Thank You Response</u></b> Prepare correspondence to participants (attendees, VIPs, sponsors, exhibitors)	Post Conference		X	X

<b>Conference Functions</b>	<b>Timeline</b>	<b>Set/ Done</b>	<b>Co-Host Committee</b>	<b>National Planning Staff</b>
<b><u>Financial Statement – Post Conference</u></b> Prepare financial report to include with the After Action Report	Post Conference			X
<b><u>Post Conference Detail Coordination and Report</u></b> Prepare After-Action Report	Post conference		X	
<b><u>Post Conference Archive</u></b> Coordinate assembly of materials, photos and documents in one center source to be located at the Executive Office	Post conference			X