

20__ FBINAA Annual Training Conference

July __ - __, 20__ City, State

Conference Functions & Assignments Checklist

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

Conference Functions	Timeline	Set/		Co-Host Committee	National Planning Staff
		Done	;		Stati
Income – Receivables Receive conference income as stipulated	18 months through post conference			X	
on the approved budget (line items	post conference				
identified as tier three)					
Income – Receivables	18 months through				Х
Receive conference income as stipulated	post conference				Λ
on the approved budget (line items	post conference				
identified as tier one and two)					
Expenses – Payables	18 months through				Х
Pay expenses from entity account for	post conference				
expenses allocated by budget tier one and	'				
two funds					
Service Contracts	18 months through			Х	
Approve and enter into contracts with	post conference				
providers for services allocated by budget					
tier three funds					
Service Contracts	18 months through				Χ
Approve and enter into contracts with	post conference				
providers for services allocated by budget					
tier one and two tier funds					
Exhibition Plan and Opportunities	18 months prior				Χ
<u>Package</u>					
Prepare details for exhibit booths,					
promotional opportunities & benefits					
Conference Website	12 months prior				Х
Acquire domain, design and develop	through post				
website, and manage website content and	conference				
functions	10 11				
Training & Presentation Call for	18 months prior				Χ
Proposals					
Launch call for proposals online					
submission site, recruit training opportunities and collaborate with					
committee training selection team for final					
selection of sessions					
Venue Site Visits	18 months prior			Х	Х
Coordinate at least one site visit with	To months phot			Α	Λ
committee and planning staff to review					
logistics and planning details					
General Conference Profile	18 months prior	1 -	=		Χ
Prepare the general profile under the					•
direction of the Co-Host Committee					
(including registration fees, goals &					
objectives, meeting space assignment)					
Sponsorship Recruitment and	15 months prior	1		X	Χ
Acquisition	through post				
The Co-Host Committee, planning staff,	conference				
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)			_		
Sponsorship Support	15 months prior				X
Coordinate benefit fulfillment, manage	through post				
database, and coordinate sponsor on-site	conference				
needs and inquiries					

Conference Functions	Timeline	Set/ Done	Co-Host Committee	National Planning Staff
		Done		
Exhibitor Recruitment and Acquisition The Co-Host Committee, planning staff,	15 months prior through post		X	X
Executive Board and Executive Office	conference			
staff all team to recruit and acquire	Contended			
vendors for the conference exhibition				
(focus on contacts at the local Chapter				
and Section level, national and				
international vendors and new				
acquisitions)				
Exhibitor Support	15 months prior			Х
Coordinate benefit fulfillment, manage	through post			
database, and coordinate exhibitor on-site	conference			
needs and inquiries				
Promotions & Marketing Schedule	12 months prior			Х
Prepare details for promotional materials	,			
(electronic brochure, eBlasts) and				
schedule for marketing				
Housing Schedule	9 months prior			X
Prepare details for how accommodations				
will be provided to attendees, comps,				
committee, executive board and VIPs				
Conference Evening Event Schedule(s)	9 months prior		X	
Prepare details for the main conference				
evening events (Welcome Reception,				
President's Reception, Family Night, and				
Gala Banquet)	0 11 1	_		
Printing & Program Schedule	9 months prior			X
Prepare details for design and				
development of the printed conference				
program and other materials Food & Beverage Schedule	0 months prior	_		X
Prepare details for food and beverages by	9 months prior			^
function				
Transportation Schedule	9 months prior	-	X	
Prepare details for airport transfers, event	9 months pho		^	
transportation and parking				
Giveaways Schedule	9 months prior	 	X	
Prepare details for attendee giveaway	o montrio prior		^	
(delegate bag/gift, spouse bag/gift, child				
bag/gift) and prize giveaways				
Ceremonies and Business Meetings	9 months prior			Х
Schedule	'			
Prepare preliminary details for the				
opening ceremonies, closing ceremonies,				
Gala banquet, business meetings and				
other similar functions				
Activities & Excursions Schedule	9 months prior		X	
Prepare preliminary outline of family				
activities and excursions to be offered				
during the conference		_		
Youth Center and Activities Schedule	9 months prior		X	
Prepare details for how the youth center				
will function (including preliminary				
activities and events)				

Executive Board - Co-Host Committee Dinner Dinner Design, plan and execute dinner Design, plan and execute dinner Secutive Board Support Ordinate the Board meetings, special events and special needs for the Executive Board Support	Conference Functions	Timeline	Se Do	Co-Host Committee	National Planning Staff
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Ceremonies – Performances and Local 6 months prior X		conference			
	Ceremonies - Performances and Local	6 months prior		X	
	Groups	through post			
Coordinate performances for Opening conference	Coordinate performances for Opening	conference			
Ceremonies, Closing Ceremonies	Ceremonies, Closing Ceremonies				

Conference Functions	Timeline	Set/ Done	Co-Host Committee	National Planning Staff
		Done		Stair
Delegate Hospitality and Travel	6 months prior		X	
Assistance	through post			
Manage hospitality and greeting of	conference			
attendees and provide "ambassadors"				
during conference (i.e. airport transfers,				
event greeting, special delegate needs)				
Food and Beverage Management	6 months prior			X
Manage logistics and coordinate details;	through post			
manage BEOs with venue	conference			
Technical Production Services	6 months prior			Χ
Prepare specifications, solicit proposals,	through post			
and manage logistics and details	conference			i .
Conference Program Brochure	6 months prior			Χ
Manage logistics and coordinate details	through post			
	conference			
Decorative	6 months prior			Χ
Manage logistics and coordinate details	through post			
3 3	conference			
Entertainment	6 months prior		Х	
Solicit, select and manage performers	through post			
Colloit, coloct and manage performers	conference			
Delegate and Attendee Supplies	6 months prior			X
Manage logistics and coordinate details	through post			
Manage logistics and coordinate details	conference			
Daily Attendes Communications				
Daily Attendee Communications	6 months prior			X
Manage logistics and coordinate details	through post			
(i.e. eBlasts, electronic newsletter)	conference			
Registration – On Site	6 months prior			X
Manage on-site registration process and	through post			
coordinate with FBI staff and volunteers	conference			
Shipping and Receiving	6 months prior			Χ
Manage logistics and coordinate details	through post			
	conference			
Family Activities and Tours	6 months prior		X	
Manage production and direct logistics	through post			
	conference			
Youth Activity Center	6 months prior		X	
Manage production and direct logistics	through post			
	conference			
Welcome Reception	6 months prior		Х	
Coordinate logistics and manage event	through post			
during conference	conference			
President's Reception	6 months prior		Х	
Coordinate logistics and manage event	through post			
during conference	conference			
Family Night	6 months prior		X	
Coordinate logistics and manage event	through post			
during conference	conference			
			X	
Golf Tournament	6 months prior		_ ^	
Confirm off-site contracts, coordinate	through post			
logistics and manage event	conference			
Pistol Shoot	6 months prior		Х	
Confirm off-site contracts, coordinate	through post			
logistics and manage event	conference			
<u>5K Run</u>	6 months prior		X	
O a first off alternational and a literature	lat to a	1 1	1	
Confirm off-site contracts, coordinate logistics and manage event	through post conference			

Conference Functions	Timeline	Set/ Done	Co-Host Committee	National Planning Staff
Motorcycle Ride	6 months prior	Done	X	Stair
Confirm off-site contracts, coordinate	through post		^	
	conference			
logistics and manage event				
Women's Graduate Breakfast	6 months prior		X	
Coordinate details and manage event	through post			
T (" 15 1: 0 :	conference			
Transportation and Parking Services	6 months prior		X	
Confirm contracts, coordinate logistics	through post			
and manage services	conference			
Security and Command Post	6 months prior		X	
Coordinate logistics and manage	through post			
command center	conference			
Store Operations	6 months prior			Χ
Coordinate logistics and manage store	through post			
	conference			
Charity Support - Silent Auction	6 months prior		X	
Manage solicitations, acquisition and	through post			
logistics for auction	conference			
Elections	6 months prior			Х
Direct and coordinate logistics during	through post			
conference	conference			
Signage	6 months prior			Х
Manage logistics and coordinate printing	through post			,,
manage regiones and secremans printing	conference			
Conference Supplies and Equipment	6 months prior			Х
Manage logistics and coordinate details	through post			,,
Wanage logistios and ocordinate details	conference			
Photography Services	6 months prior		X	
Order and coordinate photography	through post		^	
services	conference			
Media Relations	6 months prior		Х	
Manage media relations if needed	through post		^	
Manage media relations in needed	conference			
Complimentary Room Assignment	3 months prior		X	X
Assign contractual guestroom comps as	through post		^	Λ
desired and advise planning staff to	conference			
incorporate in accommodations plan	Contenence			
On-Site Committee Coordination	During conference		Х	
Manage and direct committee and other	During contenence		^	
law enforcement staff to serve as				
Ambassadors and hosts for conference				
	During conference			V
On-Site Planning Staff	During conference			X
Manage and direct planning staff to				
coordinate the logistics and services	Dening a conference		V	
On-Site Volunteer Coordination	During conference		X	
Manage resources, solicit and train				
volunteers, and direct efforts to assist the				
Committee and planning staff in the				
execution of the conference	<u> </u>			
Evaluation	Post Conference			X
Prepare evaluation tool and manage				
responses and final report				
Thank You Response	Post Conference		X	X
Prepare correspondence to participants				
(attendees, VIPs, sponsors, exhibitors)				

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