

Creating Excellent Chapter Events

November 19, 2019

ASPIRE
YOUR LEARNING JOURNEY

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Area 8 Regional Training & Vendor Showcase

Christine Moody, CPPO, CPPB

Camber Schlag, CPPB

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Area 8 Regional Training & Vendor Showcase

- **Concept Hatched at 2016 Leadership Symposium**

- (Oregon and Washington Chapter President's)

- **1st Regional Training was held in 2017**

- **2019 Planning Process**

- Regional Partners Monthly Conference Call
- Developed Partners Agreement
- Save the Date Flyers went out Early
- Formed Subcommittee's
 - Registration, Speakers, Logistics, Sponsor, Communications, Charity



Area 8 Regional Training & Vendor Showcase

2019 Planning Process

- No Seed Money (lessons learned), Increased Registration Costs Instead
 - OPPA Members - \$200.00
 - Non-Members - \$250.00
 - Free Registration (OPPA Board Member and Committee Chairs)
- Sent out a 'Call for Presentations' to Chapter members in December 2018
 - Received 8 Applications
 - Subcommittee Reviewed and Approved of 7 Topics
 - Cut Down on Speaker Fees
 - Only Paid for 2 Speakers (Members Received Free Registration)

Area 8 Regional Training & Vendor Showcase

Sponsorship Packages

- **Annual Package \$3,760 (7 standard) \$3,525 (2 COBID)**
 - Full year website advertisement
 - Regional and Fall Conference Exhibit Table
 - “Commercial Break”
 - Golf Tournament (greens fees, hole sponsor, photos)
 - Meals including Awards Banquet
- **Premium Package \$2,160 (5 standard) \$2,160 (1 COBID)**
 - Same as Annual Package except:
 - Website advertisement (April - September) & Regional Conference Exhibit Table (not fall)
- **Regional Conference Only**
 - **Gold \$1,000 (5 standard) \$900 (2 COBID)**
 - **Silver \$800 (15 standard) \$720 (5 COBID)**
 - **Bronze \$400 (5 standard) \$360 (5 COBID)**

Area 8 Regional Training & Vendor Showcase

Budget - Expenses

| | Estimated | Actual |
|-----------------------|--------------------|--------------------|
| Total Expenses | \$56,116.00 | \$63,698.46 |

| Sunriver Resort | Estimated | Actual |
|--------------------|-------------------|-------------------|
| Room and hall fees | \$0.00 | \$0.00 |
| Equipment | \$5,000.00 | \$4,968.40 |
| Total | \$5,000.00 | \$4,968.40 |

| Speaker Fees | Estimated | Actual |
|--------------|--------------------|--------------------|
| Chad Hymas | \$11,000.00 | \$11,000.00 |
| Mike Purdy | \$1,500.00 | \$1,500.00 |
| Total | \$12,500.00 | \$12,500.00 |

| Gifts/Prizes | Estimated | Actual |
|---------------|-------------------|-------------------|
| Member Bags | \$3,500.00 | \$2,882.32 |
| Speaker Gifts | \$300.00 | \$196.62 |
| Total | \$3,800.00 | \$3,078.94 |

| Miscellaneous | Estimated | Actual |
|-----------------|-------------------|-------------------|
| Vendor Booths | \$1,400.00 | \$1,650.00 |
| Golf Tournament | \$1,960.00 | \$1,868.00 |
| Decorations | \$1,000.00 | \$445.46 |
| Photography | \$1,000.00 | \$750.00 |
| Entertainment | \$4,000.00 | \$4,000.00 |
| Total | \$9,360.00 | \$8,713.46 |

| Food & Beverages | Estimated | Actual |
|------------------|--------------------|--------------------|
| Food | \$25,000.00 | \$34,205.00 |
| Linens | | \$0.00 |
| Total | \$25,000.00 | \$34,205.00 |

| Speaker Accommodations | Estimated | Actual |
|------------------------|-----------------|-----------------|
| Rob Rickard | \$128.00 | \$91.33 |
| Kevin Yin | \$128.00 | \$141.33 |
| Total | \$256.00 | \$232.66 |

| Speaker Travel/Meals/Per Diem | Estimated | Actual |
|-------------------------------|-----------------|---------------|
| Mileage | \$200.00 | \$0.00 |
| Total | \$200.00 | \$0.00 |

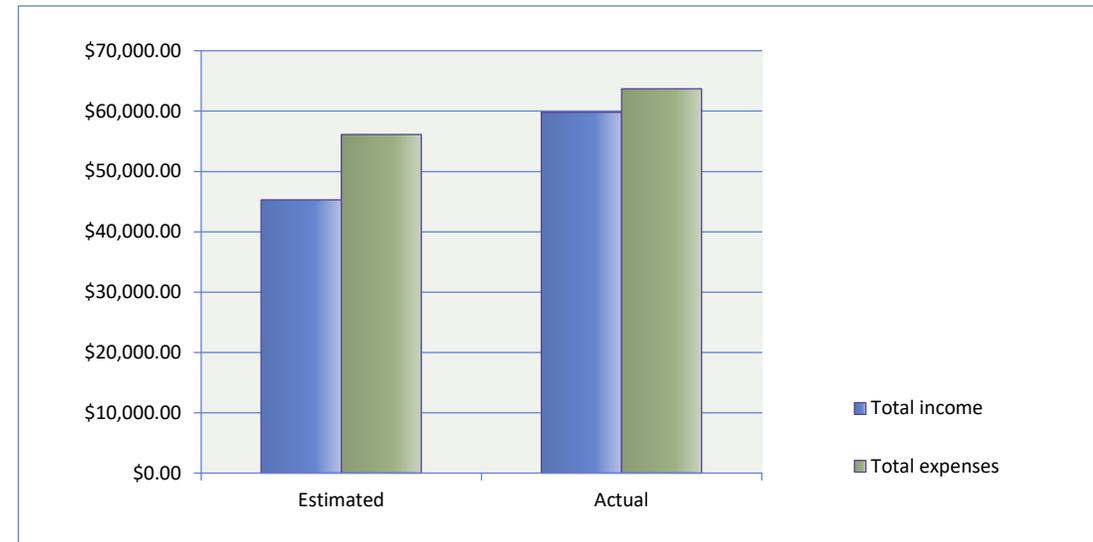
Area 8 Regional Training & Vendor Showcase

Budget - Income

| | | Estimated | Actual |
|--|------------------------|--------------------|--------------------|
| Total Income | | \$45,285.00 | \$59,816.25 |
| Registration Fees | | | |
| Estimated | Actual | Estimated | Actual |
| 18 | 24 Registration - Free | \$0.00 | \$0.00 |
| 83 | 89 Member Rate | \$200.00 | \$17,800.00 |
| 27 | 37 Non Member Rate | \$250.00 | \$9,250.00 |
| | | \$16,600.00 | \$17,800.00 |
| Sponsorship Money | | | |
| | | Estimated | Actual |
| | | \$28,085.00 | \$38,345.00 |
| NIGP Class Rebate | | | |
| | | Estimated | Actual |
| | | \$600.00 | \$1,409.25 |
| Misc. Income (extra meals, golf, etc) | | | |
| | | Estimated | Actual |
| | | \$600.00 | \$2,262.00 |

Budget - Summary

| | Estimated | Actual |
|-------------------------------|---------------------|--------------------|
| Total income | \$45,285.00 | \$59,816.25 |
| Total expenses | \$56,116.00 | \$63,698.46 |
| Total profit (or loss) | -\$10,831.00 | -\$3,882.21 |



Area 8 Regional Training & Vendor Showcase

- **Agenda Snapshot**

| Wednesday | Thursday | Friday |
|-------------------------------|----------------------|----------------------------------|
| NIGP Class | Charity Presentation | Ed Sessions |
| Golf Tournament | Ed Sessions | Charity Wrap-up & Present Checks |
| Young Professionals Reception | Dinner Banquet | |
| Opening Reception | Entertainment | |

- **Vendor Tradeshow (Thursday)**



Area 8 Regional Training & Vendor Showcase

Professional Development



NIGP Class - Wednesday

14 Workshop Sessions in Total

Simultaneous Sessions Thursday Afternoon

Virtual Access



Live Streamed Rick Grimm's Opening

All Other Sessions Recorded and on YouTube

<https://www.youtube.com/oregon+public+purchasing+association>

Area 8 Regional Training & Vendor Showcase

Charity Fundraising

Two Local Non-Profits Devin's Destiny & Grandma's House



Golf Tournament with Sponsors

Area 8 Regional Training & Vendor Showcase

Charity Fundraising

Raffle Baskets and Casino Night





Questions
for
Christine and Camber

Lone Star Conference

Damon Harris
SETAPP Chapter
Houston Area

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Collaboration

- The current Lone Star Conference actually started under the title of “CPPB Conference” in the early 90’s
- By the late 90’s the State of Texas NIGP Chapters made the change to the new title
- The Chapters work together to determine who will host, we move it from Chapter to Chapter
- Even though each conference is handled independently we all share our membership lists, registration lists, the speaker lists, and schedules
- Each Chapter adds an item on their website promoting the upcoming conference
- Each Chapter promotes the upcoming conference at their quarterly meetings

Determine Leadership Roles

- You must ensure the right person is in the right role, some people volunteer for the free registration or discounted registration but are not committed
- Ensure the individuals know the commitment level, have written job responsibilities for each role
- We offer free registration for Committee Chairs and discount to Committee members
- Our Conference Chairs were:

Conference Chair

Vendor Expo Chair

Facility Chair

Education Chair

Registration Chair

Budget Chair

Marketing Chair/Special Events Chair





Start early!!!!!!

- ▶ You already have a full time job so start early!
- ▶ Determine the dates for the event, but be willing to change by a week or two for availability
- ▶ Pick a theme and keep that throughout the conference, ours was baseball
- ▶ Conference Chair should develop a timeline so the event stays on track (9 - 12 months out, 6 - 8 months out, 3 – 5 months out, 1 – 2 months out, 10 – 14 days out, day before, after the event)
- ▶ Meet monthly for lunch to review where we were and what we had accomplished, it's very important that every Chair attend every lunch meeting
- ▶ In between the lunches we communicated via email
- ▶ After the conference, meet to discuss what went right, what went wrong and what improvements need to take place for the next event

What Comes First?

- Once the chairs have been assigned, the Budget Chair needs to put together a basic budget to get started
- Determine the cost for registration and vendor sponsorships and vendor expo tables
- Use a previous conference for estimated numbers of attendees and vendors
- The budget will be ever changing throughout the year and must be kept up-to-date at all times
- The Facility Chair locates venues, look at multiple venues and obtain pricing from multiple venues
- Look for a venue that has restaurants/shopping/entertainment within walking distance
- Hotel should have enough conference rooms to accommodate your event, you don't want to have the event in multiple locations



- Negotiate at the beginning with the hotel for GSA rate
- Your hotel contract will require a room guarantee, be very careful that you don't over estimate because your Chapter is financially responsible for those rooms
- Ensure you can add additional rooms
- Review hotel contract to ensure the correct room rate is listed, the room guarantee number is correct and service fee rate is listed
- Work with the hotel on the minimum spend for food
- Have ample space for the vendor expo
- The amount of attendees and sponsors will dictate the quality of food....how fancy and will determine any social events
- We had a happy hour with appetizers and 2 drink tickets
- Social event was at a professional baseball park with food, 2 drink tickets, home run derby, scavenger hunt and casino tables

- Conference Committee determines if chapter is paying for any speakers, we do not
- Edu. Chair needs to start early with securing speakers and confirm multiple times
- Education Chair should also have 4-5 speakers ready to contact in the event a scheduled speaker cannot attend or is a no-show, good to use a chapter member
- Audio visual equipment can be expensive at hotels so we provided our own laptops (3) and we borrowed projectors so we only rented the microphones and speakers
- Get donations for the goodie bags and the binders for the program
- Determine if giving speaker gifts and if so cost limit
- Marketing is important, send out save the date emails once date is secured and continue emailing monthly until the last 4 months then increase to every 2 weeks and then once a week
- Registration was handled through Chapter Manager but registration committee must be very organized
- Send out a survey and look at the results
- We had 113 attendees and 67 vendors and net profit was \$27K and we spent more money than we ever had before!

Be Prepared for “Things” That Come Up



- Our first night we received over 12” of rain and our opening reception was across the street from the hotel and yet all was great and attendance was fantastic
- Wednesday morning Facility Chair received a call that the breakout rooms got flooded but the hotel was fantastic and put us in other rooms
- Service rate increased for the hotel but because we had a binding contract they were bound to that rate
- Inevitably some one will show up that did not register or came in place of some one else, have a laptop and printer at the hotel to accommodate making their name badge
- Be prepared to step in and assist a Chair that is not doing their job because in the end it affects the whole conference

Our After Action Review

- Send out registration confirmations 2 weeks prior (even though the system gave them one)
- Send out pre-conference class confirmations 2 weeks prior (even though the system gave them one)
- Use wrist bands for social events if outside of the hotel
- Each Chair needs to prepare a detailed job description now while fresh on their minds
- Sign in sheets are needed for pre-conference seminar
- Certificates are needed for pre-conference seminar at the end of the day
- Certificates are needed for conference attendees for distribution at the end of the event
- Notify speakers in advance that we'd like their presentations so they can be added to the website after the event
- **AND remember to have FUN! It's contagious!!**



Forms Utilized

- Save the date flyer
- Preparation timeline
- Budget form
- Vendor Exhibitor Application



Questions For Damon

Area 2 Conference

Maureen McIlvaine, CPPO, CPPB

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Area 2 Conference

History

- 1989 NIGP's Region III member chapters started discussing holding a Regional Conference
- Member chapters were Delaware, Maryland, Washington DC, North Jersey, South Jersey and Pennsylvania
- A Hosting Rotation schedule was set up

Area 2 Conference

- Chapters can count on receiving Revenue at least once every 4-5 years
- Each chapter's members are treated as Host Chapter members for Registration rates
- First Region III Conference was held in 1991, hosted by MPPA



Area 2 Conference



- The scheduled Host Chapter can trade years with another chapter or decide to skip their year for hosting.
- If the scheduled Host chapter decides to skip their year, the next Chapter in the rotation could decide to host that year and the chapter that skipped their turn is scheduled to host in another 4 years.

Area 2 Conference

- 3rd quarter 2021- Conference Chair will present the Board with a recommendation for Conference dates (usually held in October), location and budget; Board approves.
- 4th quarter 2021- Request official NIGP visit; Conference marketing begins:
 - Post “Save the Date” information on the Chapter Website



Area 2 Conference

- Ask other chapters in the Area to post “Save the Date” information on their websites
- Post Registration and Hotel information
 - Delegate Registration
 - 1-Day \$100
 - Full Conference (2 ½ day) \$200
 - Vendor Registration
 - \$800- one expo booth w/ table & two chairs; two lunches at expo; contact information listed in the program, 1-month web posting





Area 2 Conference

- \$1000 Gold Vendor- one expo booth w/ table & two chairs; two lunches at expo; ½ page ad in program, 3-month web posting
- \$2000 Platinum Vendor- one double sized expo booth in prime location w/ table & four chairs; four lunches at expo; full page ad in program, 6-month web posting
- Start working out the program schedule
 - Start looking for speakers
 - We started thinking about speakers shortly after the completion of the previous year's conference in DE
 - Goal was to secure some speakers that didn't necessarily offer "public procurement" training, but current topics that would be relevant to our group.

Area 2 Conference

- Don't forget resources from previous work experience- one resource had a presentation on cybersecurity that we used
- Look at local colleges for certificate programs and adult learning classes
- Look at other professional organizations



Area 2 Conference

- Look within your own chapter or neighboring chapters
- Request a Chapter Ambassador to update your attendees on what's new in NIGP
- Start to look for vendors sponsors
 - \$500 Educational Room Sponsor: signage at the room, announced at time of speaker introduction, recognition in Program (helps pay for room charge as well as AV equipment rental)
 - \$950 Beverage/Snack Sponsor: signage at break area, ¼ page color ad in Program (helps to supplement cost of morning or afternoon break on Day 1 or Day 2)



Area 2 Conference

- \$750 Bag Sponsor: bag with vendor logo, ¼ page color ad in Program
- \$750 Program Sponsor: Full page color add on back cover of Program
- \$750 Name Tag/Lanyard Sponsor: Name tag/lanyard with vendor logo, ¼ page color ad in Program
- \$2000 Breakfast Sponsor: Signage at room, 10 minutes to speak during breakfast, two attendees at breakfast, ½ page color ad in Program, 6-month web sponsor (helps to supplement cost of breakfast)

Area 2 Conference

- \$3000 Lunch Sponsor: Signage at room, 10 minutes to speak during lunch, two attendees at lunch, ½ page color ad in Program, 9-month web sponsor (helps to supplement cost of lunch)
- \$3200 Reception Sponsor: Signage at reception area, 10 minutes to speak during reception, two attendees at reception, full page color ad in Program, a drink named after the vendor, 9-month web sponsor.

Sponsors

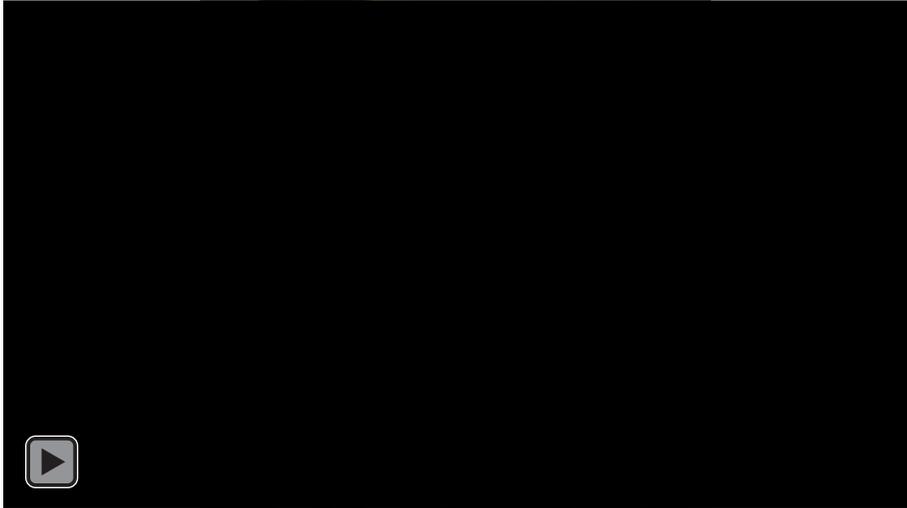


Area 2 Conference

- 2nd quarter 2022- start to advertise program and sponsor vendors
 - If other Chapters in your Area are from another State(s), be considerate of your differences- do not have speakers that only address your State's requirements.
 - Offer two or three sessions at the same time to give Delegates choices.
 - Try not to repeat sessions.
 - Ask the other Chapters if they have any vendors they would like invited to the Vendor Expo

Area 2 Conference

- In the weeks before conference- finalize registration numbers; finalize meals with the hotel; print program- ask the next Host Chapter in the rotation for any available “Save the Date” information for their Area 2 Conference.



**Have fun at
your
Conference!**



Questions
for
Maureen

Kansas City Regional Procurement Exposition



Russ Pankey, CPPO, CPPB



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Kansas City Regional Procurement Exposition

- Collaboration
- Planning
- Struggles
- Successes





Kansas City Regional Procurement Exposition

Collaboration

- Produced every other year since early 1990's by
 - Missouri Association of Public Purchasing (MAPP)
 - Mid America Council of Public Procurement (MACPP)
 - Kansas Association of Public Purchasing Professionals (KAPPP)
- Venue: Kansas City region, thus the name
- Logo



Kansas City Regional Procurement Exposition

Collaboration

Governance

- Oral agreement since inception
- Duties and the revenues have always been split as equally as possible
- Chairs or co-chairs from each chapter
- President or someone appointed by the chapter – main point of contact



Kansas City Regional Procurement Exposition

Collaboration

Planning

- History – For many years, planning committee included anyone
 - Met face to face monthly for year prior to event
- Since 2016, only co-chairs and committee chairs
 - Meet via conference call, conference call
- Chairs recruit/engage volunteers, work with committee



Kansas City Regional Procurement Exposition

Collaboration

Pros/Cons/Challenges

- Pro-Current planning strategy reduced stress and is more efficient
- Pro-Promotes communication among chapters
- Pro-Reduces negative chapter competition
- Con-Don't really see any
- Challenge-member engagement
- Challenge-Finding great speakers and presenters within budget



Kansas City Regional Procurement Exposition

Collaboration

Dividing revenue and cost

- Engage a Treasurer for the event
- Treasurer works with the co-chairs to ensure security of funds, expenses, etc.
- Separate checking account; never co-mix with chapter accounts
 - Manage all expenses & revenues through a single account
- Revenue divided equally by 3
- Keep \$3,000 seed money (\$1,000 per chapter)



Kansas City Regional Procurement Exposition

Planning

Agenda

- Typically Wednesday noon through Friday noon
- Mini-Forum model:
 - Vendor expo
 - Keynote speakers/presenters
 - Certification-focused training - maximize contact hours
 - Social event
 - Networking - procurement pros and vendors
- Session length-don't make them too long
- Fun things-door prizes, Chapter Academy ideas



Kansas City Regional Procurement Exposition

Planning

Timeline and Task List

- Begin at least a year out
 - One year out – meeting every other month
 - Six months out – every month
 - Two months out – every two weeks
- First things-hotel and agenda
- Task list-defines committees, deadlines, responsibilities



Kansas City Regional Procurement Exposition

Planning

Task List/Committees Example:

- Venue/Facilities
- Agenda/Program
 - Publications
 - Transportation
- Vendor Expo
- Delegates
 - Packet Assembly
- Finance
- Food/Hospitality
 - Hospitality Suite
- Social Event
- Photographer



Kansas City Regional Procurement Exposition

- Fees – delegate registration \$125 – full registration
 - Pro-rated daily rates
- Vendors – 1 booth \$500, 2 people, listed in program
 - \$75 for each additional person beyond 2
- Sponsorships –
 - Bronze \$300 – 1/8 page ad; 1 month on website
 - Silver \$500 – ¼ page ad; 3 months on website
 - Gold \$750 – ½ page ad; 6 months on website
 - Platinum \$1,000 – ¾ page ad; 9 months on website
 - Diamond \$1,200 – full page ad; 12 months on website



Kansas City Regional Procurement Exposition

Struggles

- Policy & procedure
 - Determining how things should be done
 - Written plan if needed
- Volunteer engagement
 - Manning committees
- Marketing
 - It's everyone's responsibility



Kansas City Regional Procurement Exposition

Struggles (continued)

- Vendor Expo
 - It's everyone's responsibility
 - Hiring a marketing firm?
- Communication
 - Whose responsibility is it?
- Technology
 - Website
 - Registration



Kansas City Regional Procurement Exposition

Successes

- WIIFM – What’s In It for Me?
- Networking
 - Probably most valuable takeaway
- Learning and transformation
 - Focus goal is to experience change/transformation



Kansas City Regional Procurement Exposition

Successes

- Recognition
 - Recognize everyone!
- Fun
 - Most IMPORTANT! Have fun!
 - Create experiences



Questions For Russ