

II. PLANNING A SECTION MEETING

A. Goals and Objectives

Determining meeting goals and objectives will provide the basis for determining program content and should serve as the guiding principle for each element of your Section meeting. It is important to collect the necessary information about the intended meeting audience to help formulate effective and clear goals and objectives. Knowing who the audience will be and conducting a needs assessment are the first steps in setting meeting objectives. The question to ask yourself is **“What is to be accomplished as a result of this meeting?”**

Collecting demographic and other critical information on past and prospective attendees is a critical element of determining goals and objectives. It is important for Section Executive officers to understand an attendee’s primary reasons for coming to a Section meeting, as well as the expectations AOAC members have for an event. Understanding the wants and needs of AOAC members is essential to designing objectives that will serve and promote member’s professional and educational needs.

Sections with a strong history and many traditions may not be open to radical changes, and the program objectives may remain similar year after year. However, if a Section is experiencing a decline in registration numbers it may be a sign the needs of attendees are not being met. In this case an objective should be to take a proactive approach and conduct a needs analysis. To design a needs analysis the key questions to investigate include:

1) Is attendance mandatory or voluntary?

Meeting attendees will have different expectations based on their reasons for attending the meeting. Attendees who have been sent to a meeting by their employers for industry-specific training may have different expectations than someone looking to expand their knowledge about their common interest or profession.

2) Who is paying the expenses for the attendee?

This issue will effect the expectations of the attendee.

3) How important are networking opportunities?

Networking opportunities may be offered in a variety of settings. Exhibitions offer a great opportunity for attendees to meet key industry suppliers and see the newest products and services. Receptions and meal functions offer a setting for informal discussions among attendees. Roundtable discussions offer a great opportunity for attendees to share experiences about a particular topic.

4) What professional and educational niche do we serve?

The current educational and professional needs of members are an essential part of determining meeting objectives. Items to identify include industry trends and changes in technology impacting responsibilities of members.

B. Program Development

After the goals and objectives have been established the program format and topics can be developed. If it is customary to do so, a meeting title and theme is selected before content is developed. Next, outline the desired meeting format combining an appropriate number of educational hours with social and extracurricular activities. Consider the attendees' preferences and interest levels and keep the program flexible. Plan breaks from the educational program to avoid over-taxing the attendees' concentration. Include a registration period, a formal opening, meal and social functions, exhibition hours (if applicable), and a formal closing or evaluation session.

In planning the program schedule, many factors must be taken into consideration. In addition to the meeting and learning objectives, factors such as logistical constraints of the potential meeting site, and timing of key sessions to best meet the needs of participants. Prior attendance patterns and the success of past programming choices will be the most reliable guide to scheduling specific events.

1) EDUCATIONAL FORMAT

Educational format should include a variety of delivery mechanisms. Techniques to consider for enhancing educational delivery include:

- ◆ **Presenter Format:** A panel of experts in selected subject areas are identified, with each giving a brief presentation. At the conclusion of the presentations, the audience is given an opportunity to ask questions of the entire panel.
- ◆ **Structured Questions:** Prepare eight to ten questions per one-hour presentation to be distributed in advance of the session to selected attendees. Presenters will have already prepared thoughtful answers, eliminating the potential for misinformation. This technique also confines the question and answer period to a set period of time.
- ◆ **Workshops:** This setting allows for problem-solving laboratories.
- ◆ **Roundtables:** The discussion group format provides an opportunity to use the major speakers one more time. A key topic and a topic expert are assigned to a table and attendees engage the experts in an informal atmosphere.
- ◆ **Hands-On Participation:** When discussing the appropriate topics, the hands-on demonstration is interesting and useful. Demonstrating AOAC Research Institute Rapid Method Test Kits would be an example of a topic for hands-on participation.
- ◆ **Controversy Panel:** To stimulate interest and debate, arrange for two or three views of a controversial issue to be presented.

- ◆ **Poster Sessions:** Photographs, charts and tables summarizing the topic are posted on a corkboard in a logical order. The printed program specifies when the presenter will be at a designated board to discuss the posted material.

2) PROGRAM COMMITTEE

Working with your Program Committee is a key component in developing a successful meeting program. The Program Committee is a recommended standing committee of each AOAC INTERNATIONAL Section.

Responsibilities for Program Committee members may include the following items, but not all of the responsibilities listed below are applicable for every Section meeting.

- 1) Meeting promotion/publicity/registration;
- 2) Development of the technical program;
- 3) Site, facilities, audio-visual equipment;
- 4) Exhibits/Sponsors; and
- 5) Social program, meals, recreational events, spouse and technically oriented tours.

Members for this program Committee should be selected on the basis of their dependability, accessibility and knowledge of the subject matter. The chairperson should be able to maintain organizational control and be confident enough in the program planning process to delegate responsibilities.

Planning sessions will be more efficient and organized if performance expectations are clearly defined. For example, guidelines might include the following:

- 1) Know and respond to all time lines and deadlines.
- 2) Report to chairperson and staff liaison immediately if deadlines cannot be met.
- 3) In contacting prospective speakers:
 - Obtain full names, mailing addresses and telephone, fax and e-mail addresses;
 - Explain expectations and format, including objectives and guidelines;
 - Delineate all remuneration and fee policies;
 - Indicate need for manuscripts and handouts; and
 - Report immediately to staff liaison and chairperson if assignments are inappropriate or cannot be completed in the time frame allocated.

Another useful tool you may consider using to facilitate your meeting session is a “**planning workbook**”. This workbook should be sent to committee members before the first planning meeting. A loose-leaf binder provides flexibility in making additions and deletions as the program develops.

A typical table of contents may include:

- ◆ List of committee members with their work, home and e-mail addresses, telephone and fax numbers;
- ◆ Committee performance criteria including members roles and responsibilities;
- ◆ Meeting goals and objectives;
- ◆ Brief history of program structure and previous year's promotion pieces and programs;
- ◆ Evaluation summary of previous program;
- ◆ Minutes of previous program planning meetings;
- ◆ Site information including floor plans and room capacities;
- ◆ Estimated attendance and meeting dates;
- ◆ Meeting budget;
- ◆ Planning deadlines/time frames; and
- ◆ Information on other elements of the program such as exhibits, spouse programs, tours, food and beverage functions and accommodations for people with disabilities.

The program development plan is the foundation upon which you will build your Section meeting. Thorough record keeping and staying in touch with the needs of the attendees can assist in the development of future plans. Evaluations, comments and feedback from attendees can provide valuable insights for the plan and its implementation.

Because the educational program is a primary reason attendees come to Section meetings, it stands to reason that the plan designated to create this program is a vital part of the process. Creating a team effort around a well thought-out and thorough program plan leads to the accomplishments of objectives.

3) SPEAKER COORDINATION

Working with your speakers is another key component in successful program development.

Evaluating potential speakers once you have identified them is a good idea to consider. This is a list of questions you might want to ask each speaker.

- ◆ How long have you been speaking?
- ◆ What are your credentials and background?
- ◆ Do you have any videotape, audiotapes or written promotional materials?
- ◆ Have you spoken for other companies/associations in the same industry?
- ◆ Will you bring your own handouts?
- ◆ Will you be accessible to the audience, either before or after the presentation?

Prepping speakers is an important function of program development. At a minimum, be sure to tell your speakers about:

- ◆ Expectations for topic and length of presentation.
- ◆ Audience size, age range, ratio of males/females.
- ◆ Session format including time allotted for Q&A.
- ◆ Name and topics of those sharing the platform.

- ◆ Dress code (business attire, casual, black tie).
- ◆ Speaker lounge or “ready room” location/hours.
- ◆ Subjects, if any, that are off limits or that might be considered controversial.
- ◆ Names of “high profile” people who will attend. Consider whether you wish the speaker to mention anyone by name. Sometimes it helps to personalize the presentation; sometimes it’s better left out.

Helping your speakers succeed will reflect on the success of your Section meeting.

- ◆ If your speaker is to speak after a meal, make certain the table service will be finished or will be unobtrusive when the speaker begins.
- ◆ Keep the meeting on schedule, especially for that last speaker.
- ◆ Plan your introduction carefully. Make sure not to mispronounce your speaker’s name or misspell it in any literature. If you condense the bio provided, make sure that you emphasize the important points.
- ◆ Involve the speaker in the development of conference promotional materials.
- ◆ Make sure the speaker receives copies of all promotional material and media invitations.
- ◆ Work with the speaker to create memorable handouts. Surveys show that conference attendees rate handouts as an essential part of the learning experience.
- ◆ Keep speakers informed as the program develops. Provide a Speaker Kit outlining when materials are due – particularly as it relates to promotional deadlines.

AOAC INTERNATIONAL Speaker Representatives

If you would like to request a representative from AOAC INTERNATIONAL, AOAC staff and members of the Board of Directors to attend your Section meeting as a speaker or presenter, fill out and return the “AOAC Speaker Request Form” in Appendix A. **Forms must be received at least 120 days prior to your meeting date.** An AOAC representative cannot be sent to your Section meeting unless a formal request is submitted. Requests will be honored based on availability of travel funds.

C. Budgeting and Financial Management
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A good financial management system sets up a framework that monitors all elements of a meeting and allows the Section to:

- ◆ Monitor the financial situation as it relates to the goals and objectives;
- ◆ Understand where income is coming from and where it is going;
- ◆ Identify the percentage of income and expenses derived from individual areas;
- ◆ Analyze and control expenditures;
- ◆ Determine areas to increase revenues and reduce expenditures; and
- ◆ Make decisions affecting all areas of the meeting.

Establishing financial goals should be completed before any other planning begins. The budget will determine many components of the meeting and should be communicated to key

suppliers to allow everyone to work within a common frame of reference.

The first step is to determine the expenses of the meeting. A functional expense budget allows all expenses to be categorized under the proper area of the meeting. This allows for easy monitoring of costs.

Functional areas to include in your budget are:

- ◆ Program development and production (program committee expenses, speaker expenses, program printing and other production costs);
- ◆ Executive Committee expenses (travel and complimentary registration expenses if applicable);
- ◆ Promotion/marketing (development and production of all marketing tools);
- ◆ Exhibit costs (promotion, decorator, signage, security and space rental);
- ◆ Registration expenses (badges, forms, personnel, computer equipment);
- ◆ Audio visual equipment;
- ◆ Social functions (tickets, food and beverage costs); and
- ◆ Operations (duplication, postage, meeting room rental and insurance).

Determining income is accomplished in much the same way as expenses were developed. Like expenses, income should be budgeted by function areas. Main income areas include registration fees, exhibitor income, sponsorship income, and social functions.

The most important use of financial statements and budgets is to allow for decision-making based on actual fiscal performance. The opportunity for continuous adjustments in the overall meeting can provide not only increased profitability for a program, but also increased benefits to attendees.

At the conclusion of each Annual Section meeting, financial reports and bank statements must be sent to AOAC headquarters. Financial management is important to the success of the meeting and to overall organizational goals and objectives.

D. Site Selection

Selection of a meeting site can be a critical factor in the success or failure of a Section meeting. Needs of the event must first be identified and matched to those sites that can handle the requirements.

Prepare a list of meeting specifications to provide to potential facilities. Items on your list should be in a format by day, time and hour so it can be reviewed easily and compared to space availability in the facility.

The list should include:

- ◆ Preferred dates;
- ◆ Anticipated attendance;
- ◆ Number and type of sleeping rooms, if any;
- ◆ Number, size and usage of meeting rooms;
- ◆ Range of acceptable rates;
- ◆ Types of food and beverage events; and
- ◆ Exhibits and any other special events or activities.

The meeting's objectives and physical requirements will usually dictate the general area where the meeting should be located. Political and economic factors may play a part in narrowing the choices, or organizational policy may dictate the general location.

There are several **types of facilities** that you may want to consider to best match your meeting's objectives and physical requirements.

Each has unique advantages and disadvantages.

- ◆ Metropolitan hotel
- ◆ Suburban hotel
- ◆ University
- ◆ Airport hotel
- ◆ Resort
- ◆ Conference center

Site selection is the most important phase of planning a meeting because it is here that a successful meeting begins. **The process should follow six basic steps:**

- 1) Identifying the meeting objectives;
- 2) Developing the format of the meeting;
- 3) Determining the physical requirements of the meeting;
- 4) Defining attendees' interests and expectations;
- 5) Selecting the general area and type of facility; and
- 6) Evaluating the choices.

E. Exhibitors

Having exhibits at your Section meeting can be a good way to generate additional revenue as well as interest by attendees. If you are planning to have exhibits at your Section meeting, you will need to determine the scope of your exposition and compare the costs to the expected revenue.

Items to consider include:

- ◆ Number of exhibits
- ◆ Type and size of exhibits
- ◆ Timing and format, relative to technical sessions
- ◆ Electrical usage
- ◆ Security issues

- ◆ Availability of space to accommodate exhibits
- ◆ Signage
- ◆ Clean-up following the exposition
- ◆ Materials and services to provide
- ◆ Increasing traffic by holding breaks in exhibit area
- ◆ Materials to include in the Exhibitor Kit

Many AOAC Sections choose to provide a tabletop with skirting and no electrical services for their exhibitors. This has been a successful way for the Section to generate additional revenue without increasing their costs substantially. The fees charged range from \$100-\$350 per tabletop display. To receive a sample Exhibitor Kit, please contact the Manager, Section programs at AOAC INTERNATIONAL headquarters.

F. Registration Procedures

Registration is the first impression that attendees will have of the Section meeting. A carefully planned registration process that is quick and easy as possible for attendees to utilize will be greatly appreciated by attendees. Just as a poor registration will frustrate potential attendees and possibly mar an otherwise outstanding program.

Pricing strategy will be different for each Section. Some will choose to include all Section meeting activities in the registration fee. Others may choose to keep the fee as low as possible so as not to discourage people from attending. Activities and special events are added as optional fees in addition to the meeting registration fee.

Other items to consider when determining the registration process include:

Including an **advance registration** option can dramatically simplify on-site traffic problems, improve attendance and generate cash flow during the months preceding the meeting. An advance registration announcement or brochure should contain complete information highlighting registration procedures, such as:

- ◆ Fee for each category of registrant (AOAC member, Section member, Early Bird, Advance, On-site, etc.) **Note:** According to AOAC policy, all AOAC product and service fees (including Section activities) **must** have a lesser rate for **AOAC members** vs. non-members. This is a **required** policy that must be considered when determining registration fees for Section meeting attendees. Sections may choose to have a pricing structure that allows for different rates for Section-only members, but it is not required.
- ◆ Materials and amenities included in fee.
- ◆ Deadline for receipt of advance registrations.
- ◆ Policy on credit cards, checks, purchase orders, foreign funds and wire transfers.
- ◆ Cancellation and refund policies.
- ◆ On-site fees that will apply (if different from advance fees).
- ◆ On-site registration location and hours.

Attendees should be able to register by mail, phone, fax or on-line. Confirmation should be expedient, with a follow-up mailed, faxed or e-mailed within 48 hours. Payments should be received by check, money order or credit card.

For those Sections without the necessary equipment to process credit card payments, AOAC is offering a service you may want to consider. AOAC can process credit card payments for Section meeting registrations on an “at cost” basis. This means 5% of the total charges will be deducted from the consolidated check sent to the Section as a processing fee (as passed on from the credit card companies).

Sections collect the registrations for meeting attendees and then send data to AOAC, all at one time, for processing. For each transaction the Section must provide AOAC with the following information:

- 1) Cardholder’s name as it appears on card
- 2) Expiration date
- 3) Account number
- 4) Transaction amount

Credit cards that are accepted include VISA, MasterCard and American Express.

Please contact the Membership Coordinator, Section Programs for additional details regarding this Section benefit.

G. Meeting Evaluation

Meeting evaluation should be incorporated into your overall Section meeting management strategy. Evaluation allows you to determine whether the goals and objectives of your meeting have been met and can be used for planning future meetings and defining the needs of your attendees. You might also utilize this form as a recruitment tool to identify future volunteers.

Some questions you might want to include on the meeting evaluation include the following.

- ◆ Did attendees feel the meeting was of value to them?
- ◆ Did the program meet the attendees’ educational needs?
- ◆ Were the promotional efforts for the meeting effective?
- ◆ Did attendees like the location of the meeting?
- ◆ Were social events entertaining?
- ◆ Were speakers informative and interesting?
- ◆ Were the networking opportunities sufficient?
- ◆ Did registration run smoothly?
- ◆ Did hotel and meeting rooms meet attendees’ expectations?
- ◆ Were exhibitors pleased with their sales leads?
- ◆ Are you interested in participating in future Section meetings?
- ◆ What topics would you like to see on future programs?

Evaluation typically occurs after an event has happened. The best results will be achieved if forms are gathered immediately after a session or workshop, while opinions are still fresh.

Guidelines for Designing the Evaluation Form:

- 1) Keep the evaluation form short and simple.
- 2) Ask specific questions.
- 3) Make it easy for attendees to complete evaluations.
- 4) Provide for convenient collection of evaluations. If evaluations are collected on-site, receptacles should be clearly marked and readily available. If possible, have volunteers collect evaluations as attendees exit the meeting room.
- 5) Make sure your form is designed so you can conduct data analysis with the information.