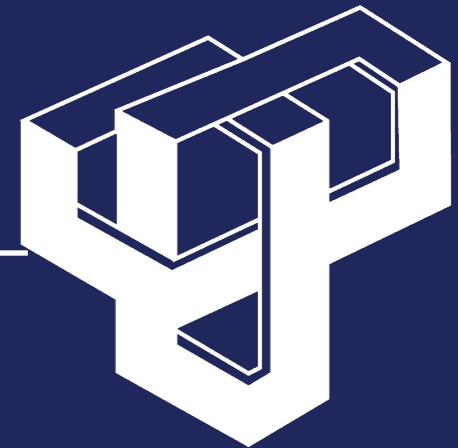


2021 ANNUAL CONFERENCE



SO YOU THINK YOU CAN HOST?: HOW TO BID FOR A CONFERENCE

Presented By:

Christina Aichele | NACURH Conference Resource Consultant

Dr. Cory Shapiro | 2018 Annual Conference Advisor, Arizona State University-Tempe;

2013-2016 IACURH Regional Advisor

Scott Singleton | On Campus Marketing

Stephanie McDade | On Campus Marketing

Angela Powell | Student Playbook

Please sign in at: tinyurl.com/BidHostAttendAC2021

BEFORE YOU BEGIN THE BIDDING PROCESS

- **Things To Do**

- Speak to your advisor and/or any other administrators about the possibility of gaining school support.
- Read the NACURH Policy Book (Conference Section).
- Read your region's governing documents/policy book.
- Tour your campus to make sure you have the facilities needed to host.
- Attain past conference bids and wrap up reports; utilize them as resources.
- Contact your Regional Advisor and Director for specific information about bidding on the regional level and bidding resources.
- Contact the NACURH Conference Resource Consultant for the Host School Acknowledgement Form and additional bidding resources.
- Review applicable conference checklist (Annual Conference, RLC, RBC/SLC).
- Consider your theme. What do you want your conference's message or story to be? How will you incorporate it into all aspects of the conference?



HOST A NACURH CONFERENCE & ANNUAL CONFERENCE BID VIDEOS

- [Host a NACURH Conference](#)
- [2015 | North Dakota State University](#)
- [2016 | University of Delaware](#)
- [2017 | Purdue University](#)
- [2018 | Arizona State University -Tempe](#)
- [2019 | Louisiana State University](#)
- [2020 | University of Dayton](#)



CONFERENCE STANDARDS



THINGS TO CONSIDER FOR YOUR BUDGET

- What are the NACURH or regional breakdowns of the budget?
- How detailed does the budget need to be?
- Staff/RBD/SEC/NACURH Boards Costs
- Conference Insurance
 - Do you need to purchase insurance?
 - Insurance is not required if the conference is hosted virtually.
- Contracts
 - When do you sign?
 - Who signs?
- Banking Costs or Administrative Fees
- How do you plan to keep people accountable to the budget?
- What is the break even point? (See NACURH or regional policy or your finance officer for this).



BUDGET PLANNING AND DEVELOPMENT

- Contact your regional Associate Director for Administration and Finance (regional conferences) or the NACURH Conference Resource Consultant (Annual Conference) for the conference budget template.
- Regional conference budgets may vary region to region– consult your regional policy book/governing documents for more information.
- Consult the NACURH Policy Book for NACURH Policies governing regional conferences.
- Things to Consider
 - Break Even Point
 - How detailed should the budget be?
 - Banking Costs and Administrative Fees



HOST TEAM OR COMMITTEE RECRUITMENT AND SELECTION

- Things to Consider
- How many staff members should your team consist of?
- Check out wrap-up reports for previous positions and descriptions.
- Recruitment Methods
 - Email
 - Social Media
 - Meetings
 - Word of Mouth
 - Videos
 - [2018 Annual Conference Staff Recruitment Video](#)
- Application Processes
- Appointment Processes
- Should you receive the conference, what is the process for bid team members to continue on through the conference as host team members (if applicable)?
- Conference Bid Team vs. Conference Team



THINGS TO CONSIDER FOR YOUR BID

- * = Not required for a conference hosted in a virtual format!



THINGS TO CONSIDER FOR YOUR BID

- Insurance *
- Does the host school have the ability to obtain liability insurance to cover the conference?
- What will the cost of the insurance be?
 - The cost may be incorporated into the conference budget.
- NACURH policy requires the host school to submit a certificate of insurance (special event liability policy) purchased specifically for the conference or documentation that the purchase of the certificate is in progress to the CRC no later than thirty (30) days after winning the bid for the conference.
 - Minimum coverage is outlined in policy.
 - Again, if the conference is hosted virtually, the insurance requirement is waived.



THINGS TO CONSIDER FOR YOUR BID

- **Facilities ***
 - What are the requirements/needs?
 - Signing of Contracts
 - Be sure all facility arrangements are in writing.
 - Contingency Plans
 - Are facilities large enough for mass gatherings/large events/philanthropy?
 - Are there regulations about food? Serving costs?
 - Accessibility for those with disabilities or special needs?
 - What does your office of disability services consider reasonable accommodations?
 - Plan for “signers” at large gatherings for attendees with hearing impairments.
 - Hidden costs: tech support, set-up charges, charges for tables, chairs, security, etc.



THINGS TO CONSIDER FOR YOUR BID

- **Working With Hotels ***
 - Parking and fees-think about vans and buses. Costs?
 - Keys
 - How many per room?
 - Who will distribute?
 - Lost key cost?
 - How will you handle or coordinate check-in and check-out?
 - When reserving blocks of rooms, be sure all rooms have 2 double/queen beds or can hold 4 delegates or 2 advisors, etc.
 - How will the hotel do billings?
 - Are any deposits required up front?
 - Who signs contracts?
 - Does the hotel understand your conference? Door decs?
 - Security - will it be provided?
 - Cutting off or blocking movie channels, room service, etc.
 - Make sure hospitality rooms, meeting rooms, complimentary rooms for each specified room that you book are appropriately noted in your budget.
 - Can food be brought in or do you need to work with hotel catering?



THINGS TO CONSIDER FOR YOUR BID

- **Safety and Security ***
 - Needs
 - What is required by the facility? Institution? Department policy?
 - What is needed based on the location of the facilities?
 - Will a traffic control guard be needed for walking across a busy street? If so, is there a cost?
 - Costs
 - Communication
 - Radios
 - Cell Phones
 - How will they be identified?
 - Student vs. Professional
 - Hotel and Conference Events
 - Training



THINGS TO CONSIDER FOR YOUR BID

- **Volunteer/People Power**
 - Needs for Volunteers
 - How many will you need for various areas of the conference?
 - Recruiting Volunteers
 - Training and Recognition of Volunteers
 - Scheduling and Assigning Volunteers
 - Meet Committee Needs and Tasks
 - How will volunteers be identified?



THINGS TO CONSIDER FOR YOUR BID

- **Transportation ***
 - What type/needs?
 - Accessibility for Delegates with Special Needs
 - Charge by mile, hour, day?
 - Insurance, License Requirements
 - Shuttle Schedules
 - Vehicle and Driver Contracts
 - Who is able to drive?
 - If bringing delegates to off-campus events, does your campus have a policy concerning schools driving themselves?



THINGS TO CONSIDER FOR YOUR BID

- **Registration**
 - Timeframe
 - What are your dates?
 - What will be included in the registration process?
 - Set-Up and Check-In Process
 - Process for Confirmation/Notifications to Schools (Timely Manner)
 - Invoices
 - Conference Cap | Will there be a conference cap? How will you handle alternates, cancellations, etc.?
 - Have you reviewed NACURH policy that defines conference registration and check-ins (i.e. No Pay/No Key policy)?



THINGS TO CONSIDER FOR YOUR BID

- **Educational Sessions**

- Requirements and Needs for Rooms/Facilities
- Speaker Contracts
 - When do you need to sign a contract or agreement?
- How will you recruit sessions?
- How will you select sessions?
- What will the educational session tracks be?
- What are the tech needs and what equipment do you have access to? What are the costs?
- Do you need tech support for any sessions? Is there a cost involved?



THINGS TO CONSIDER FOR YOUR BID

- **Philanthropy**

- What sort of opportunity would you like to offer and who would you like to partner with? What is its meaning in relation to your conference?
 - On-Campus Partners
 - Community Agencies
 - Agreements?
- Space Needed
- Time Needed
- Supplies and Costs
- Supporting Regional Initiatives



THINGS TO CONSIDER FOR YOUR BID

- Sponsorship
 - Conference Sponsors
 - Corporate Partners/Corporate Sponsors
 - Money, Items In-Kind
 - Advertising/Recognition
 - Deadlines
 - Contract
 - Be sure all agreements are in writing!



THINGS TO CONSIDER FOR YOUR BID

- Summits/Site Visits/Semi-Annual (NACURH Annual)/Pre-Conference *
 - Housing
 - Hotel?
 - On Campus?
 - Cost?
 - Food
 - Schedule
 - Conference Staff Availability
 - Meeting Room Space
 - Tech Needs



BIDDING!

- [2018 | Arizona State University - Tempe Bid Presentation at 2017 Annual Conference at Purdue University](#)



NACURH AND REGIONAL CONFERENCE POLICIES

- It is IMPERATIVE that you check your regional policy book/governing documents regarding conference bidding and hosting!
- It is IMPERATIVE that you check the NACURH Policy Book regarding conference bidding and hosting!
- PLEASE BE SURE TO READ BOTH DOCUMENTS!



CORPORATE PARTNERSHIP: ON CAMPUS MARKETING

- What They Do

- Advertisement - Copy-Ready and Guidebook
- Representative(s) at Each Regional Conference
- Presentation at Conference (at least one)
- Pens (1/Delegate- Regional Leadership Conference)
- Pens/Pads for NCCs - RLC and Regional Business/Spring Leadership Conferences
- \$150 for the Advisor Social (RLC)
- \$100 for the Advisor Social (RBC/SLC)
- \$1,000 for the Advisor Social (Annual Conference)
- \$500 for RHA Presidents Social
- Goodie Bags (1/Delegate) for Annual Conference



CORPORATE PARTNERSHIP: ON CAMPUS MARKETING

- What They Need From Conference Hosts
 - Time at the Banquet to Present (if applicable)
 - Printing of advertisement, no cost to OCM.
 - Registration fees waived for 2 OCM staff; single rooms provided (regional).
 - Registration fees waived for 4 OCM staff (Annual Conference).
 - No vendors in similar business may display, advertise or otherwise have presence at the conference.
 - Conference Delegate/School List (approved by RBD/SEC)



CORPORATE PARTNERSHIP: ON CAMPUS MARKETING

- Please note that the previously mentioned corporate sponsorship information is provided regardless of the host school.
- Take this information into consideration when bidding so you are not budgeting for pens and so that you build in costs for your OCM representative's attendance, etc.
- Have Questions? Call or email Scott Singleton at 1-800-220-4237 or scott@ocm.com.



SPONSORSHIP: STUDENT PLAYBOOK





What We Do

Student Playbook improves job and internship outcomes for college students and alumni.

The Student Playbook platform offers a truly personalized experience, with special focus on equitable outcomes, for example serving first-generation students and underserved populations.



Student Playbook Solutions... Helping NACURH Succeed!



➤ NACURH Partnership

We can help NACURH, including Regional Conferences!

- ✓ Educational sessions with career related topics – networking, internships, resume building and more.
- ✓ Financial support for Social Justice programs and other projects.
- ✓ Financial benefits for NACURH groups that sponsor Student Playbook.
- ✓ Free ongoing access to our webinars for conference delegates.
- ✓ Sessions to help delegates learn about Student Playbook and utilize our tools.
- ✓ Videos to support NACURH values and share Student Playbook information.



NRHH

-
- Items to Consider in Planning
 - Boardroom Space
 - Seating Chart | Helpful in arranging reps and in counting placards.
 - Educational Sessions
 - NRHH Track | Promote service and recognition.
 - OTMs
 - Philanthropy
 - Passive Recognition
 - Posters
 - Recognition Boxes/Jars
 - Be sure space is provided for initiatives such as these.
 - NRHH Social
 - Open Space | Allows for congregation and conversation.



AFFILIATION & MERCHANDISE

- Please be sure there is an affiliation station in the check-in process!
- The Store
 - Lockable room to store merchandise
 - Specified location(s) for selling
 - Scheduled, advertised times to sell
 - For regional conferences, check-in, lunch, and banquet typically work well
 - For regional conferences, an assistant (from either the conference staff or regional board) to help set up and oversee merchandise



WRAP-UP REPORTS

- Every school hosting a regional and Annual conference MUST submit a wrap-up report by the specified date.
- It may be helpful to put a timeline for completion in your bid; please note there are set due dates for wrap-up reports:
 - Regional Conferences | 60 Days After Last Day of Conference
 - Annual Conference | 120 Days After Last Day of Conference



ANNUAL CONFERENCE ROLL CALL AND WRAP-UP VIDEOS

- Roll Call Videos
 - [Great Lakes Affiliate | 2011 Annual Conference](#)
 - [NACURH Board of Directors | 2017 Annual Conference](#)
 - [Southwest Affiliate | 2018 Annual Conference](#)
 - [NACURH Leadership | 2018 Annual Conference](#)
 - [Great Lakes Affiliate | 2019 Annual Conference](#)
 - [NACURH Leadership | 2019 Annual Conference](#)
 - [Intermountain Affiliate | 2020 Annual Conference](#)
- Wrap-Up Videos
 - [2015 | North Dakota State University](#)
 - [2016 | University of Delaware](#)
 - [2017 | Purdue University](#)
 - [2018 | Arizona State University - Tempe](#)
 - [2019 | Louisiana State University](#)
 - [2020 | University of Dayton \(Virtual\)](#)



QUESTIONS AND RESOURCES

- Contact the NACURH CRC with questions and for resources for the NACURH Annual Conference:

crc@nacurh.org

- Contact your Regional Advisor and Director with questions and for resources for regional conferences:

CAACURH | ca_advisor@nacurh.org and ca_director@nacurh.org

GLACURH | gl_advisor@nacurh.org and gl_director@nacurh.org

IACURH | ia_advisor@nacurh.org and ia_director@nacurh.org

MACURH | ma_advisor@nacurh.org and ma_director@nacurh.org

NEACURH | ne_advisor@nacurh.org and ne_director@nacurh.org

PACURH | pa_advisor@nacurh.org and pa_director@nacurh.org

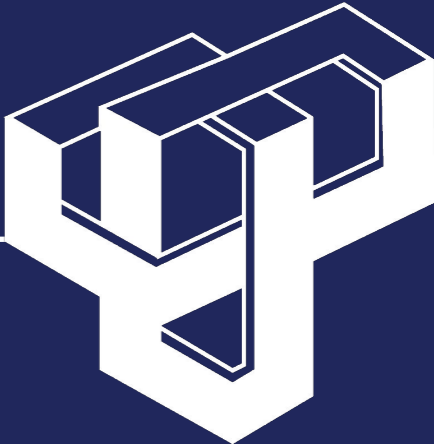
SAACURH | sa_advisor@nacurh.org and sa_director@nacurh.org

SWACURH | sw_advisor@nacurh.org and sw_director@nacurh.org



2021 ANNUAL CONFERENCE

HOW TO HOST A CONFERENCE



NOW THAT YOU HAVE WON THE CONFERENCE...

- Things To Do

- Develop your team!
- For regional conferences, develop a relationship with your regional board; for the Annual Conference, develop a relationship with the NACURH Executives.
- Read the NACURH Policy Book (Conference Section).
- Read your region's policy book/governing documents.
- Obtain past conference wrap-up reports to utilize as resources.
- Make sure the NACURH Conference Resource Consultant has ALL your required paperwork and information.
- Schedule visit with your regional board or the CRC (for Annual Conference)!
- Provide updates!
- [2018 Annual Conference Update #1](#)
- [2018 Annual Conference Update #2](#)



ADDITIONAL BUDGET ITEMS TO CONSIDER

- Monthly Updates
- Changes to Budget/Approval by RBD/SEC/NBD
- Contracts
 - When do you sign?
 - Who signs?
- How do you plan to keep people accountable to the budget?



ADDITIONAL FACILITIES ITEMS TO CONSIDER

- What has changed since getting quotes and placing initial reservations during bid process?
- Consider security, technology, set-up/tear-down and other facilities needs?
- When will your vendors need final numbers?



ADDITIONAL HOTEL ITEMS TO CONSIDER

- What has changed since getting quotes and making initial reservations during bid process?
- If using residence halls on-campus, set up contracts or quotes with guest and conference housing or other institution office.
- When will your vendors need final numbers?



ADDITIONAL VOLUNTEER ITEMS TO CONSIDER

- Determine roles that volunteers will fulfill.
- Develop an hourly volunteer schedule based on needs.
- Who to market volunteer opportunities to and how?
- If needed, volunteers can have conference fees (lodging and food) provided per NACURH Policy Book.



ADDITIONAL CONFERENCE TEAM ITEMS TO CONSIDER

- Start Meetings (Every Other Week vs. Weekly Meetings)
- Team Retreats/Bonding
- Motivation/Recognition



ADDITIONAL TRANSPORTATION ITEMS TO CONSIDER

- Who can drive? Develop a driving schedule.
 - Risk Management Policy



ADDITIONAL REGISTRATION ITEMS TO CONSIDER

- Do your dates give you enough time to complete what you need before your conference?
- Invoices | Roll-Out
- Conference Cap | Have you determined a delegate cap per school?
- Promissory Notes



ADDITIONAL EDUCATIONAL SESSION ITEMS TO CONSIDER

- Be sure all speakers have a signed contract or agreement.
- How will you recruit sessions?
- How will you select sessions?
- What will the educational session tracks be?
- Do you need tech support for any sessions?



ADDITIONAL PHILANTHROPY ITEMS TO CONSIDER

- If you will be collecting items, what arrangements will you need to make to deliver or distribute them?



ADDITIONAL SPONSORSHIP ITEMS TO CONSIDER

- Conference Sponsors
- Corporate Partners/Corporate Sponsors: review the OCM agreement/work with Scott Singleton; review provided Guidebook information/work with the NACURH Conference Resource Consultant.
- Money, Items In-Kind
- Advertising/Recognition
- Deadlines
- Contract
 - Be sure all agreements are in writing!



GUIDEBOOK

- Please ask the student on your conference staff who is/will be responsible for creating their conference's guide to contact the NACURH CRC directly at crc@nacurh.org with their email address *prior to beginning the process of building...it's that simple!* They will be provided with instructions from that point about how to build their guide on NACURH's "team."



GUIDEBOOK CONTINUED

- [Detailed Support Site to Freely Search Instructional Materials](#)
- [Overview for Numerous Modules and Functionalities](#)
- [Overview of How to Use the Guidebook App](#)



CONFERENCE WAIVERS

- All conference waiver language will be provided to you by NACURH.
 - There is separate language for conferences facilitated in a virtual format.
- You will be responsible for creating your waivers through JotForm or a similar tool.



ADDITIONAL WRAP-UP REPORT ITEMS TO CONSIDER

- Your region (for regional conferences) or the NACURH Conference Resource Consultant (for the Annual Conference) can provide you with a wrap-up report checklist to aid in writing your wrap-up report.
- You may contact your region (for regional conferences) or the NACURH Conference Resource Consultant (for the Annual Conference) to gather past hosts' wrap-up reports.



BEST VIRTUAL PRACTICES

- Campus Considerations
 - Creating the Conference Experience on Campus
 - Contributing to the Conference
- Conference Team Considerations
 - Two-Day Conferences
 - Built-In Breaks
 - Staff Development
 - Alternative Educational Sessions
 - Interactive Mass Gatherings
 - Spirit Packs
 - ...make it manageable!



TIPS FROM OUR PAST CONFERENCE HOSTS

- If they have a place to sleep and they have a place to eat, everything else will fall into place.
---Jess Robinson, 2014 Regional Conference Advisor, Great Lakes Affiliate
- Roll with the punches. Everything is going to be okay. Even if something unexpected comes up, you can handle it.
---Molly McKinstry, 2014 Regional Conference Co-Chair, Southwest Affiliate
- Build a strong team. As soon as you trust the team you have and you work together, things will get done more efficiently.
---Shelby Anderson, 2015 No Frills Chair, South Atlantic Affiliate
- Plan, plan, plan ahead. But, also be comfortable with last-minute changes. Strike a balance between intense planning and going with the flow!
---Emily Braught, 2015 No Frills Chair, Midwest Affiliate
- Make sure your conference evaluation is prepared and ready to send after your conference.
---Andrew Raj, 2015 No Frills 2015 Chair, Intermountain Affiliate
- The conference isn't over until the wrap-up report is submitted!
---Tyler Nees, 2015 No Frills 2015 Co-Chair, Pacific Affiliate
- If your philanthropy is an item drive, it's great when the location and receiving organization work out – and, if that's what the students want, then awesome – but often the forgotten piece is “how are we going to get ALL OF THIS STUFF to the organization!?” 😊 It also makes it tricky for traveling delegations to contribute and/or bring stuff with them.
---Kate Gannon, 2015 Regional Conference Advisor, Pacific Affiliate



TIPS FROM OUR PAST CONFERENCE HOSTS

- Take in every moment. I know it will be hard to enjoy what you are doing when your ceremonies space fell through or if your swag items are actually coming in the Monday after the conference, but enjoy watching your hard work fall into place. Believe it or not, the delegates won't see or even know the issues you are experiencing. Keep a smile on your face, your energy up, and watch the learning, growth, and development happening around you and on your campus.
---Ileana Garcia, 2016 Regional Leadership Conference Co-Chair, South Atlantic Affiliate
- Putting on a conference is more than completing tasks. You also need a group that trusts and supports each other. Ensure that you focus on staff development. As hosting gets closer or work becomes busier, be sure to stay grounded in your "why." If even one delegate leaves feeling more empowered, educated, confident, or connected, you have done your job.
---Gracie Smith, 2017 Regional Business Conference Chair, Midwest Affiliate
- Conference planning and execution shouldn't just be working, it should also be about having fun. Make sure to work hard during your conference, but most of all, take time to have fun and enjoy the conference you are planning! It's not just for your conference delegates, it's for you too!
---Alisha Mohammed, 2017 Regional Business Conference Co-Chair, Southwest Affiliate
- Adaptability! Things may come up and things can possibly go wrong, but it's all about your viewpoint on it. Lead with a positive attitude and others will follow. Let your positivity be the pebble that starts a wave of ripples.
---Esha Mohammed, 2017 Regional Business Conference Co-Chair, Southwest Affiliate



TIPS FROM OUR PAST CONFERENCE HOSTS

- School support during the bid/proposal phase of a conference looks different than school support when hosting a conference. It is important to get buy-in from staff, students, and other stakeholders when hosting a conference.
- Solicit interest from student leaders and staff and then tap strengths to build a well-rounded host committee. Utilize a plan of committees, guides, advisors, etc. depending on the conference and your school's resources available.
- Practice a bid or proposal whether it's showing the bid or sharing a presentation or video to staff.
- For Advisors: Keep your supervisor knowledgeable about the conference and team roles during planning.
- Find a structure for planning meetings that make sense whether it is a large group meeting, 1:1 meetings, and/or small group meetings.
- If the conference will be on-campus, work with your Guest & Conference Housing, Dining, Facilities Management, and Classroom Support. If the conference is off-campus, work with your Hotels/Travel Office. Either way, work with your Business & Finance, Marketing & Web Team, and Vendors as appropriate.
- Utilize strategic planning with your team and make sure to look at your institution's calendar.
- After hosting, provide appreciation while celebrating and create a transition document.
- If planning a virtual experience, make sure you are familiar with what technology format to use and the tools that go along with them.
- Double check everything and keep a book of all reservations, contracts, agreements, etc.
- Have a registration platform that is easy to use and even easier to export data for conference usage.



TIPS FROM OUR PAST CONFERENCE HOSTS

- Be prepared for the unexpected and consider creating your own emergency response protocol.
- Consider the convenience of locations and try not to have too much walking or driving between sessions.
- Be intentional about start and end times to sessions to keep everything moving smoothly.
- Hold a retreat with your planning team to focus on team-building along with understanding the purpose of hosting the conference.

---Dr. Cory Shapiro, 2018 Annual Conference Advisor and Dr. Catherine LaRoche, 2018 Annual Conference Semis Advisor

- Create a plan; then a back-up plan; then a back-up plan for your back-up plan; and, then four or five more back-up plans after that. I think what made our conference run more smoothly (even though there were some significant problems and a few last-minute changes) was that we had thought through all of the possible problems and created contingency plans for how we would address each. It made it a lot easier to deal with problems as they came up because we had already planned for the worst possible things that could happen. We also tried to think through the actual experience of every part of the conference and re-work portions that we believed could be improved. So, we paid a lot of attention at the three conferences from the time we bid until ours to see what would make things run more smoothly or enhance the experience of conference delegates.

---Rachel Jones, 2019 Regional Business Conference Advisor, Great Lakes Affiliate



TIPS FROM OUR PAST CONFERENCE HOSTS

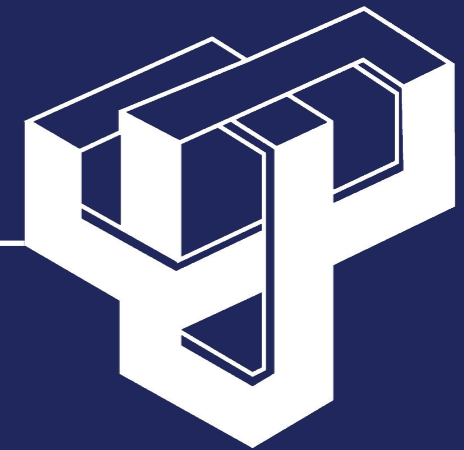
- Advisors: make your students practice their bid and presentation. I suggest having them give the presentation to you and the rest of the team and then give feedback. For the 2nd and 3rd practice times I would have other professionals and student leaders come in, give them the 5 to 10 minutes of questions just like when they present, and then have everyone give feedback. It helped my students feel more prepared and other people thought of pieces of feedback that I would have never of thought of.

Students: Have fun, it's going to be stressful but if you are presenting your bid or running the conference and are so worried about things people will notice. Prepare as much as you can, reflect on how things are going, and have fun because it will be relieving when it's over, but you won't have another experience like it.

---Andrew Beck, 2020 Regional Leadership Conference Advisor, Pacific Affiliate; 2021 Annual Conference Sponsorship and Philanthropy Advisor



QUESTIONS?



[Conference Frequently Asked Questions](#)

Thank you for attending!

Please reflect on this session at: tinyurl.com/BidHostReflectAC2021