



Area Chapter Leaders Conference Toolkit

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SECTION I: OVERVIEW

What is an area leaders conference?

While ATD offers excellent opportunities for chapter leaders to meet their counterparts from around the country at the International Conference & Exposition, the ATD Chapter Leaders Conference (ALC), and TechKnowledge, an area leader conference is the perfect venue to exchange ideas and best practices for chapter management with leaders from your geographic area.

Very often an area leader conference is hosted by a single chapter and marketed to chapters in nearby cities and states. In some instances, the conference is hosted collaboratively by multiple chapters, and every participating chapter has a stake in the success of the event.

To ensure optimal participation from chapters in your area, an area conference should be timed carefully, so as not to conflict with other chapter events, holidays, or ATD conferences.

Why host an area leaders conference?

The benefits of hosting a leader conference are numerous, and realized during and immediately after the conference. The face to face interaction that would otherwise not take place is invaluable for chapter collaboration and relationship-building. Here are some of the many reasons to host a conference:

- Networking
- Share best practices
- Find solutions to common challenges
- Professional development
- Collaboration and relationship building with nearby chapters
- Drive ideas for chapter membership growth, including joint membership growth
- Serve the profession locally
- Exposure to new speakers and topics
- Development of event planning competencies for board members
- Share database of chapter programs and speakers
- Generate volunteer enthusiasm

The Conference Idea

There is no substitute for the relationship building and networking between leaders that occur at face-to-face events. Online engagement is a tool of choice for many chapter leaders, but it is the in-person meetings that often prove to be rich and rewarding.

There are many motivations for hosting an area leaders' conference. Here's an example that illustrates some of the benefits:

A chapter V.P. of Programming returns from a meeting where local programming was a key issue but no one was able to offer viable improvement ideas. After conversations with their chapter coach and National Advisors for Chapters, the board member receives a number of good ideas and action items, but none that are specific to their geographic area.

After brainstorming the best ways to bring in a local speaker to energize their members, the V.P. reaches

out to his or her counterpart at a chapter 50 miles away. They have an upbeat conversation, exchange a number of ideas and best practices, and share contacts that would be willing to speak at each other's events. Their boards approve a reciprocity program, by which the members from one chapter receive member pricing to attend the other's programs. A month later, the V.P. of Administration for both chapters have a conversation about insurance carriers. One chapter leader tells the other of a carrier with competitive rates in the area.

All of these interactions happen electronically, over time. They could have happened more quickly in person. Area leader conferences provide these types of opportunities and have taken place in the past, either on a state level, or in a more informal setting hosted by one of the National Advisors for Chapters. The outcomes have been the same — strong best practice sharing, networking, brainstorming and problem solving.

SECTION II: MARKETING TO NEARBY CHAPTERS

Identify Marketing Radius

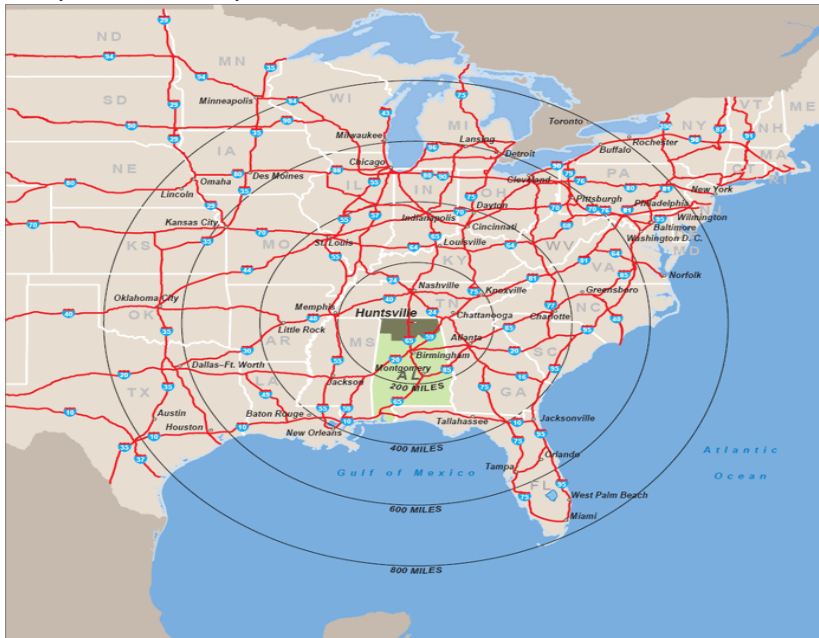
Once you've identified the need for a conference and where the host city will be, the next step is identifying a reasonable radius to market to attendees. This will depend in large part on the structure of the conference. Since most attendees will be driving, choose a city that's easily accessible from an interstate and located near as many nearby cities as possible.

If it is an event held on a Friday morning through late afternoon, it's reasonable to assume that many attendees will be travelling in the day before and leaving the day of the conference. A good rule of thumb is to target chapters within 300 miles of the host city, allowing them the opportunity to drive back to their locale at the conclusion of the conference.

An excellent mapping tool to help you determine the radius for targeted chapters can be found at:

<http://www.freemaptools.com/radius-around-point.htm>

Sample Radius Map:



Contacting Nearby Chapters

Your chapter relations manager can provide contact information for nearby chapters, or by using the chapter locator, you can find the leadership information for those chapters on their websites.

- Chapter Relations Manager - www.td.org/crm
- ATD Chapter Locator - www.td.org/chapterlocator

When approaching other chapter leaders about putting together an area conference, it's important to emphasize the collaborative nature of the event. When chapters feel like equal partners, conference attendance and engagement will be greater.

Once presidents of nearby chapters are onboard with the conference idea, it's best to set up a call to begin discussing the central themes and organizational strategies of the meeting. Your chapter coach can host the call through ATD's conference call provider and act as a discussion facilitator if necessary.

A spreadsheet should be assembled with interested area contacts, their contact information, and notes on what ideas/materials/speaking topics they're willing to supply.

Sample contact spreadsheet:

<u>Chapter</u>	<u>Contact</u>	<u>Phone</u>	<u>Email</u>	<u>Topic</u>
Northern Missouri	Jane Smith	xxx-xxx-xxxx	jsmith@jan smith.com	Membership growth
Eastern Kansas	Bob Williams	xxx-xxx-xxxx	bwilliams@williams.net	Programming
Southwest Illinois	Susan Richards	xxx-xxx-xxxx	susan@suranrichards.com	Financial administration

SECTION III: PLANNING THE CONFERENCE

Initial Call

Once you've identified the interested chapter leaders and set up a conference call, you'll need to plan an agenda for the first call. The key items you'll need to keep in mind and resolve by the end of the initial conversation are:

- Participant introductions
- Host city and location
- Targeted date
- Length (half day, full day, etc.)
- Central theme(s) of the conference
- Expected number of attendees
- Appointment of conference planning committee.

Designate a Conference Committee

When the initial high-level goals have been decided, participating chapter leaders should then form a specific conference committee, preferably with a representative from each participating chapter. The basic roles of the committee will be:

- **Director of Conference**
 - Responsible for securing location, working with staff on-site, setting up the event signs, ensuring each speaker has the A.V. equipment needed for their session, planning meals, and working with nearby hotels to negotiate a group rate (if applicable). This individual should be a board member from the host city chapter.
- **Director of Content**
 - Responsible for assembling RFP subcommittee, reviewing, approving, and declining speaker proposals, setting up session schedules, collecting speaker evaluation forms, and working with speakers to gather supporting content before the event.
- **Director of Communications**
 - Responsible for coordinating conference planning committee calls, communicating conference updates to all board members and attendees, funneling ideas from chapter leaders to committee members, and advertising the conference online through chapter websites, Facebook, Twitter, and Linked-In.
- **Director of Registration**
 - Responsible for setting up and monitoring event registration page, preparing nametags, taking registrations, updating the committee regularly on attendance numbers, and handling registration on-site.

Planning Checklist

Organization

- Determine the location
- Decide on a theme and outcomes for the event
- Determine a preliminary list of potential participants and presenters
- Recruit speakers
- Manage request for proposal process and approve sessions
- Publish session descriptions and finalize workshop schedule on the web site
- Create promotional plan – email campaign, web promotion, and social media
- Send a “save the date” email to potential participants and speakers

Logistics

- Create a budget and accounting system if the location is not in-kind donated space
- Book the venue, dining and session rooms
- Book a block of hotel rooms for participants and presenters
- Book audio visual equipment
- Select and order presenters’ gift(s) and/or prizes
- Book the caterer and get menu suggestions
- Plan the registration process – enter data into database, create/upload information for web registration
- Finalize the audio visual equipment booking
- Create on-site signage
- Design welcome packages and ice-breaker
- Web page uploading/design – registration, information on the location (map, weather link), hotel room booking, conference schedule, presenters’ profiles
- Determine session room assignments, create audio visual needs list, and room layouts

- Finalize participant and presenter list
- Finalize the menu
- Confirm with the caterer the final count of meals required
- Create on-site signage
- Finalize task lists/instructions for conference committee
- Finalize instructions for presenters
- Create name tags and welcome packages (conference schedule, participating chapters' contact information, paper, pen, flash drive if applicable)
- Create organizer's supplies kit (handouts, flip charts)

Follow up call schedule

Effectively planning the conference and ensuring all items on the checklist are met will require consistent communication. After the initial conference call, set a time each month leading up to the conference to check in and assess planning progress. In the month leading up to the conference, schedule two calls to be held two weeks apart, with the last call occurring within a week of the conference. Here's a sample call schedule for a conference planned four months out:

Second call (three months out)

- Brainstorm session content
- Target specific speakers
- Schedule for conference promotion and registration
- Determine invitation language (see example below)
- Request for proposal process
- Sponsorships (meeting space, refreshments, meals, AV, materials)

Third call (two months out)

- Review and confirm agenda
- Update on speakers
- Update on registration
- Determine if threshold has been met to continue conference planning

Fourth Call (one month out)

- Confirm AV setup
- Update on registration
- Confirm materials availability
- Confirm catering arrangements

Fifth call (week before the event)

- Ensure committee assignments are set
- Confirm attendees have received accurate agenda and directions
- Last-minute business or ideas

Sample Invitation

Below is a sample invitation from the Texas Chapter Leaders Conference:

Hello Western Conference ATD Leaders!!

The Fort Worth Mid-cities chapter is excited to host the ATD Western Regional Conference.

Date and Location

Friday evening, August 21 at 6pm will be a dinner/social. The conference will be from 8:30 to 4:30 on Saturday August 22 and will be held at the Holiday Inn Express in Hurst, Texas.

<http://www.ichotelsgroup.com/h/d/ex/1/en/hotel/dfwht> Rooms can be booked at a special rate by calling the local telephone number and requesting the ATD rate. The hotel offers free pick up from D/FW Airport, and is 25 miles from Dallas Love Field. (Southwest Airlines)

Meeting Agenda

We have a very simple plan in place that we believe will allow us to learn the very best practices from each other and to build relationships as well. We have decided not to have any guest speaker so that we can concentrate solely on learning from each other.

Our chapter has focused on a few "simple, sustainable, high-touch" strategies this year that have resulted in dramatically improved retention, chapter growth, and meeting attendance in the first six months of this year. We would like to share these strategies with the region.

These are the measurables that we want to focus on and we would like each chapter to share their best practices to retain members, grow new members, and improve meeting attendance. If each chapter that will be attending can send us their numbers for 08 and 09 for these three measurables, we will prepare a regional report as well as a national report so all of us will have an idea of what is happening. We would like to have the most successful chapters in each of these areas to participate in a presentation to share best practices.

ATD will share their best practices in one session.

The final session of the day will be an open forum to allow Q&A to deal with any unique issues and challenges that have not been dealt with earlier in the day.

The Fort Worth chapter looks forward to hosting an event that will make us all closer, better equipped to lead, and more prepared to achieve great results.

RUNNING THE CONFERENCE

Sample schedule

Friday, August 19	
7:30 – 8:30 a.m.	Registration and breakfast
8:30 - 9:00 a.m.	Introduction from Director of Conference

9:00 - 10:30 a.m.	<p><u>Session #1</u></p> <p>Building your Chapter Brand and Outreach Presenter: Jane Smith, V.P. of Membership, Northern Missouri</p>
10:30 - 10:45 a.m.	Break
10:45 – 12:15p.m.	<p><u>Session #2</u></p> <p>Twelve Months, Twelve Great Programs Presenter: Bob Williams, V.P. of Programs, Eastern Kansas</p>
12:15 – 1:15	Networking lunch
1:15 – 2:45	<p><u>Session #3</u></p> <p>Running your Chapter Like a Business Presenter: Susan Richards, V.P. of Finance, Southwest Illinois</p>
2:45 – 3:00	Break
3:00 – 4:00	Open brainstorming session
4:00 – 4:15	Director of Conference closing address and adjournment

Key points to remember

- **Don't attempt to accomplish too much** - Too often we try to plan more into the agenda than we can accomplish. As a result, discussions get rushed or cut short, and attendees can become frustrated. Instead, select only the number of objectives that can be thoroughly discussed in the time set aside for the conference. If the central themes are membership, programming and financial operations, try to maximize idea sharing around these three points.
- **Ensure facilitation and participation** – The goal of an area conference is to bring together leaders with a diverse range of experiences, ideas, and best practices. Unlike a larger conference with hundreds or thousands of attendees, a chapter leader area conference has no spectators — everyone is a participant. Engagement of every leader and the incorporation of their ideas into every discussion is critical to the event's success.
- **Make time for networking** – While content sharing is the primary driver behind an area conference, facilitating relationship building is a primary purpose. Ensure that there is time specifically set aside to network, with icebreakers, social activities, and an opportunity for each attendee to share something about themselves that the other attendees would not otherwise learn in a session.
- **Address challenges** – The most effective learning tool in this kind of environment is one of collaborative problem solving. Time should be set aside in each session to address an issue one or more of the participating chapters is having with something related to the presented content. The real measure of the conference's success will be what immediate action items can be implemented by the attendees when they return to their home chapters.
- **Record feedback** – In addition to session evaluation forms, it's important for the conference organizers to record all attendee feedback and report back to the conference committee during and after the

event. All comments about the location, session topics, food selection, attendee engagement, conference organization and quality of presenters should be recorded into a master spreadsheet and reviewed thoroughly. If the conference is a success and becomes an annual meeting, these comments will help the future planning processes.

FOLLOW UP AND EVALUATION

Follow up

After the conference is over, be sure to schedule a follow up call with the planning committee to discuss the conference in detail. The main topics of this debrief should include:

- Session evaluations
- Location convenience
- Attendance vs. expected attendance
- Informal attendee feedback
- Logistics (food, room setup, AV, registration)
- “A-ha” learning moments
- Planning for next year (date, location)

Post Conference Survey

The Director of Communications should also follow up with a survey for attendees. Included below is a sample post-conference survey.

	Excellent	Good	Neutral	Fair	Po
Conference location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conference facility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conference meals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Length of sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conference materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How relevant were the conference sessions to your role as a chapter leader?

How would you rate the overall effectiveness of the speakers?

Please provide suggestions for speakers and topics for next year's conference:

Please provide any other comments you have about your conference experience:

Good luck with planning your own ATD area leaders conference!