# TIPS FOR PLANNING AN AFFILIATE MEETING

Having meetings is a great way to bring the membership of the affiliate together to foster community and engage the members. But planning a meeting can be daunting. We have developed a step-by-step guide to break down the jobs to help you recruit volunteers and plan a successful meeting.

# First thing’s first!

The decision to have a meeting has been made – now what?! The Board needs to make some decisions before moving forward.

* What is the purpose of the meeting? Be clear about the objectives and purpose for the meeting. This will also help with marketing materials.
* Will CEUs be offered?
* How long should the meeting be?
* Where should the me eting be held? Is there a location in the affiliate that makes more sense to meet?
* Should the meeting be held during the legislative session and include a lobby day?
* Will a registration fee be charged?
* Will there be exhibitors and/or sponsors?

# BUDGET

Once these questions have been answered, the Treasurer, with input from the Board should develop a meeting budget. This budget should be realistic and serve as a guide for planning the meeting. Having a budget also helps with volunteer job descriptions and setting expectations. When setting a meeting budget, don’t forget to include the income from registrations, sponsorships, grants, exhibits, etc. Different expenses associated with a meeting could include:

* Rental Space
* Food and Beverage
* Honorarium for invited speakers
* Travel expenses for speakers
* Name badges/Handouts/Program book
* Audio/Visual
* Marketing and promotion (including signage)

# ROLES

When you ask the question, who wants to help plan the Affiliate Annual Meeting, you might be surprised how few responses you get. That question is too general and people are afraid to commit to the unknown. If you clearly lay out the tasks that need to be completed and have a job description, people will be ready to commit!

Below are some of the roles that are part of planning a meeting or event. Depending on the type and size of your meeting, you may or may not need all of these.

**Program Committee and Chair**

The program Committee develops the program of the meeting. They are the committee that identifies and invites speakers; applies for CEUs and is responsible for the content. This is a very important job that requires a lot of time and dedication.

To determine the theme and content of the meeting, the Program Committee may want to consider a survey of the membership to see what topics they would like covered at a program. The Program Committee can then set the theme, topic, schedule of the meeting and work with the speakers to obtain biographies and CVs that will be used for marketing the meeting.

The Program Committee should also develop a meeting evaluation form to be given to and collected from the attendees at the meeting. The evaluation form should ask for feedback about the speakers and topics, but also about the venue, accommodations, cost and also ask for future topics. Evaluations offer such valuable information about the meeting and help ensure the event is a success in the future.

This committee and chair will do a lot of ‘heavy lifting’ for the meeting and the Board should give a lot of thought to who they approach for these positions.

**Logistics Coordinators/Committee**

This Committee is charged with finding the location of the meeting. Affiliate meetings can take place anywhere – an office, a hotel/conference center, a restaurant or even someone’s house. However, someone needs to take the lead in determining the best location. The Logistics Coordinator should consider the size of the meeting; the budget appropriated for the locations costs and what sort of audio/visual will be needed. If many members are joining remotely, make sure there is adequate internet connection and no background noise. Meetings in a restaurant can be fun and really add to the camaraderie building, but make it difficult for members to join in remotely.

The Logistics Coordinator should also determine if there is another meeting that makes sense to hold the affiliate meeting/program in conjunction? Are the nurse practitioners meeting and could you contract for a meeting room as part of that meeting? There are many locations to have a great meeting; it just needs someone willing to do some searching.

**Registration Coordinators/Committees**

This position is charged with developing a registration system to track attendees. Depending on the meeting size and type, this could be an online registration system that also collects a registration fee; a reply to an email or a mailed in registration flyer. Whatever the method, someone needs to manage and track attendees.

Depending on the size of the meeting, this position will also be responsible for supplying name badges for those that registered and either staffing or recruiting volunteers to staff the registration table. If the meeting is going to be held at someone’s house, the Registration coordinator can also serve as the person to coordinate pot luck dishes to make sure there is ample food and variety.

**Exhibitor or Sponsorship Coordinators**

If the board decides to pursue exhibits or sponsors, a person or committee should be appointed to develop a prospectus and approach possible companies of interest. Having exhibitors or sponsors can add to the bottom line of a meeting, but please make sure the presence of exhibitors or sponsors does not violate CEU terms and conditions.

**Marketing Coordinator**

The role of the marketing coordinator is to spread the word about meeting both to members and nonmembers. Is the information that will be presented appealing to labor and delivery nurses? Are there large practices that you can send the meeting information to inform CNMs that are not ACNM members? Consider the use of social media to reach a wider audience.

The marketing materials need to clearly state the reason for and objectives of the meeting. In every marketing piece you want to present importation information:

* **Who** is the announcement from?
* **Why** someone would want to attend?
* Include the **date(s) and time**. Putting a day and a date, Wednesday, August 21, 2013, helps people remember the correct day/date.
* Include the name and address of the **location** of the meeting; if in a hotel or office, include the name of the meeting room.
* Include the **telephone number** of the location.
* Be sure to include the cost of **registration**, what each attendee receives for that price and if food is included.
* **CEUs** are a big draw. Highlight the number of CEUs eligible for attendees and if there is a separate cost to obtain the CEUS.
* Include a **call to action** such as “guarantee a seat”, “register today” helps generate registration
* If the meeting is being hosted or so-sponsored by a vendor, include that information

It is also a good idea to have someone proof the materials. If they knew nothing about the meeting, would they be able to determine the date, time, location, costs and how to register to attend?

Use any printed or emailed piece to direct potential attendees to a website with more detailed information, including speaker bios, directions to the location, overnight accommodations (if necessary) and any other pertinent information you think will encourage people to attend.

**Cleanup crew**

If the meeting is being held at someone’s house, please have someone in charge of clean up. This should not be left to the host, nor should it be put upon the host to arrange for/ask people to help clean up.

# POST MEETING

After the meeting, someone should be charged with following up with the attendees, posting presentations, and thanking the speakers. The Treasurer should make sure all expenses incurred from the meeting are paid. The Program Committee and the Board should both review the evaluations from the meeting and looking for areas of improvement and successes. These tasks are best done by the Board and/or program committee, and cannot be forgotten.

Post meeting follow up is also a great time to announce the next meeting dates and theme. It is never too early to begin planning and marketing the next meeting!