



NEHA 2018 AEC and HUD Healthy Homes Conference

Anaheim • California • June 25-28, 2018



Green & Healthy Homes Initiative®

Affiliate Leadership Workshop



NEHA 2018 AEC and HUD Healthy Homes Conference

Anaheim • California • June 25-28, 2018



Green & Healthy Homes Initiative®

CONFERENCE PLANNING 101



ConferenceDirect®

NEHA – ConferenceDirect Team



Lindsey F. White
Director of Global Accounts
Venue Sourcing and Contract Negotiation



Laura Harrison Palmer, CMP
Global Project Manager
Conference Manager



What is ConferenceDirect?

ConferenceDirect is a full service meeting solutions company that secures the best-fit hotel accommodations, meeting space, and conference venues on your behalf – all while focusing on maximizing your ROI.



How can ConferenceDirect help you?

- ❖ If your main role in your organization is *something other than* planning and organizing your meetings, ConferenceDirect can help you **save time** by taking tasks off your plate so you can focus on what your true role is within your organization.
- ❖ **Save money** by using ConferenceDirect's buying power and industry relationships to negotiate on your behalf.



ConferenceDirect's Services

- Site Selection / Venue Sourcing
- Contract Negotiation
- Conference Management
- Housing Management
- Registration Services
- Mobile App Technology
- Strategic Meetings Management



City and Venue Sourcing

- Time of year
- Location
 - ✓ Geographic decision
 - ✓ Business decision
 - ✓ Distance from airport? Downtown? Suburbs?
- Venue's/City's preference of guest room night pattern
- Cost – not just guest rooms!
- FLEXIBILITY



RFPs – Questions to Ask Yourself

- Is your pattern flexible?
- Are your dates flexible?
- Are your meeting specs updated?
- Guest Room Block – Accurate History?
- Concession Wish List – which ones are most important?



You've Chosen your Location – Now What?

Contract Negotiation

Everything is Negotiable!

Hot Points – check list?

- ❖ Deposit Schedules
 - ❖ Cut-off Dates
- ❖ Force Majeure
- ❖ Cancellation
- ❖ Renovation

Room Blocks

- ❖ Double Check!
- ❖ Performance Clause/Attrition
 - ❖ Govt per diem Rooms



We've Covered...

- ✓ City and Venue Sourcing and Selection
- ✓ RFPs (Requests For Proposals)
- ✓ Contracting



Planning – Tips and Tricks



- Keep planning details in one location (spreadsheet, folder, Dropbox, etc.)
- Write EVERYTHING down
- Add in extra time (a cushion!) wherever possible during the planning process
- Be efficient - Use your resources!
- Create a “Lessons Learned” document to add notes to DURING the planning process and DURING the conference
- “Plan for the worst, Hope for the best”

Timeline Tools – Basic Timeline



Starting
from scratch?

- Work backwards
- Check contract dates
- Ask about deadlines

NAME OF Meeting LOCATION DATES				
Average Due Dates	Actual Deadline	Task	Complete Yes/No	Staff Responsible
90	03/26/18	Determine budget, location ideas, and other details to begin planning process		
90	03/26/18	Begin site selection process		
86	03/30/18	Review potential site options		
86	03/30/18	Draft timeline		
82	04/03/18	Select hotel/meeting facility		
81	04/04/18	Request contract, direct bill, A/V, and food and beverage information from hotel/meeting facility		
75	04/10/18	Sign contract		
75	04/10/18	Post information to calendar		
		Update timeline according to contracted dates		
75	04/10/18	Discuss Social Media outlet options		
70	04/15/18	Develop conference planning spreadsheet with program, budget, F&B, housing list		
68	04/17/18	Create travel logistics document/attendee travel communications		
65	04/20/18	Hotel logistics document sent to invitees		
65	04/20/18	Submit names of travelers to Travel Agency		
60	04/25/18	Confirm with accounting that direct bill application has been completed		
30	05/25/18	Submit housing list to hotel, Assign comp rooms to attendees (No Federal; staff preferred)		
20	06/04/18	Determine the hotel hold amount for checkcards/credit cards		
20	06/04/18	Send hotel confirmation numbers with ground transportation info, hotel		
20	06/04/18	Select group dinner location, make reservations		
18	06/06/18	Order meeting supplies (if necessary)		
14	06/10/18	Final program logistics due to hotel (including room set-up, F&B, AV)		
14	06/10/18	Finalize shipping list		
8	06/16/18	Finalize evaluation form		
8	06/16/18	Finalize participant list		
8	06/16/18	Print tent cards and badges		
7	06/17/18	Stuff participant packets		
7	06/17/18	Review and sign BEOs		
6	06/18/18	Print FedEx labels and neon-colored ID labels		
6	06/18/18	Ship date		
5	06/19/18	Guarantees due		
5	06/19/18	Cancel dummy rooms on hold		
3	06/21/18	Request counter-signed BEOs if not yet received		
2	06/22/18	Print and organize onsite logistical packet		
1	06/23/18	Check-in date / Staff arrival		
0	06/24/18	Meeting Start Date		
10	07/04/18	Review hotel bill		
10	07/04/18	Post-con wrap-up and review meeting		
30	07/24/18	Confirm with accounting that check has been cut for hotel		



ConferenceDirect®

Timeline Tracking → Execution

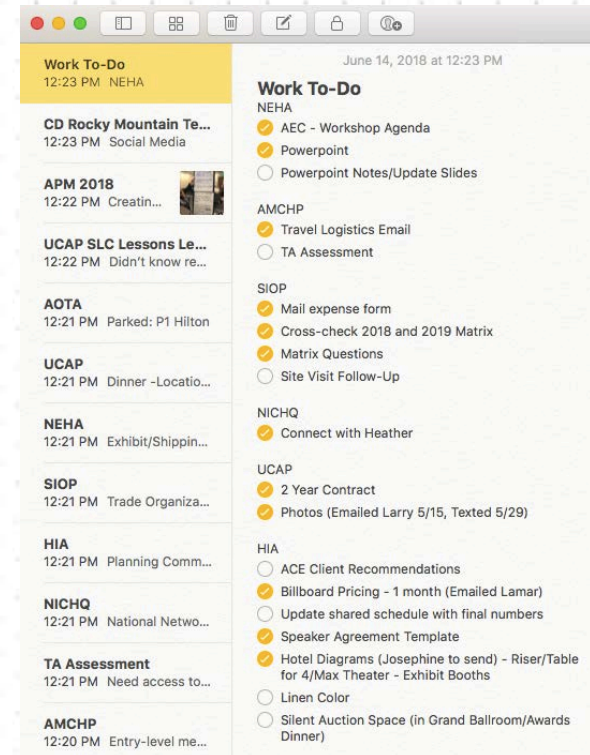
- Calendar
- Pen and Paper!
- Basic Apps
 - Notes (iPhone)
 - Evernote
 - GoogleDrive



Notes

Notes sorted by meeting/client

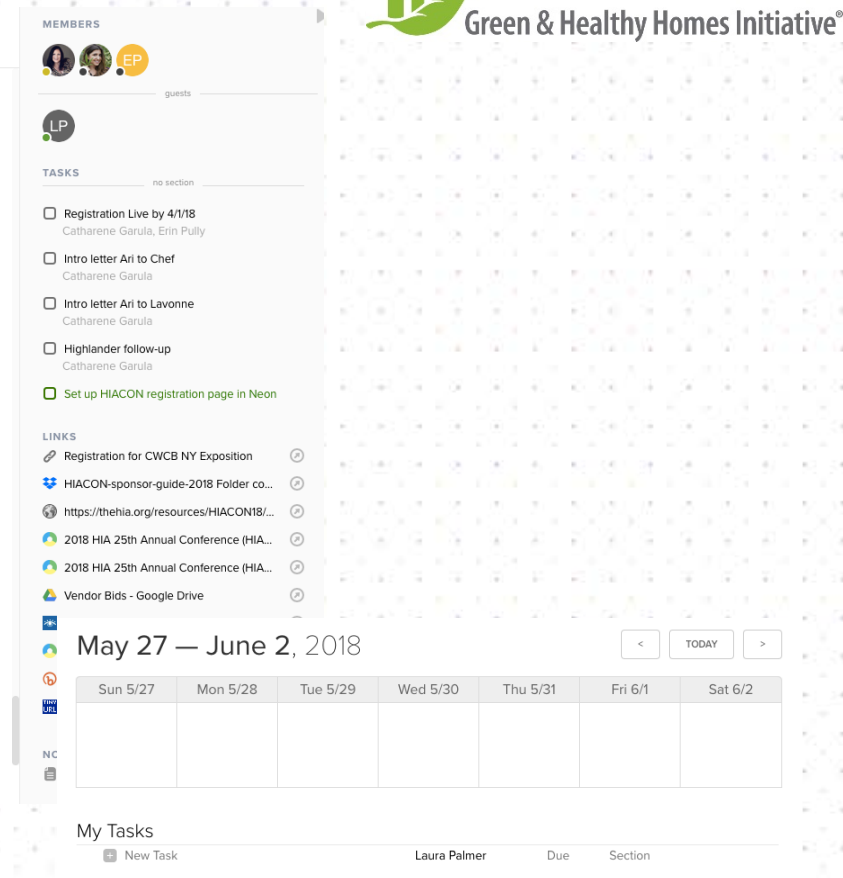
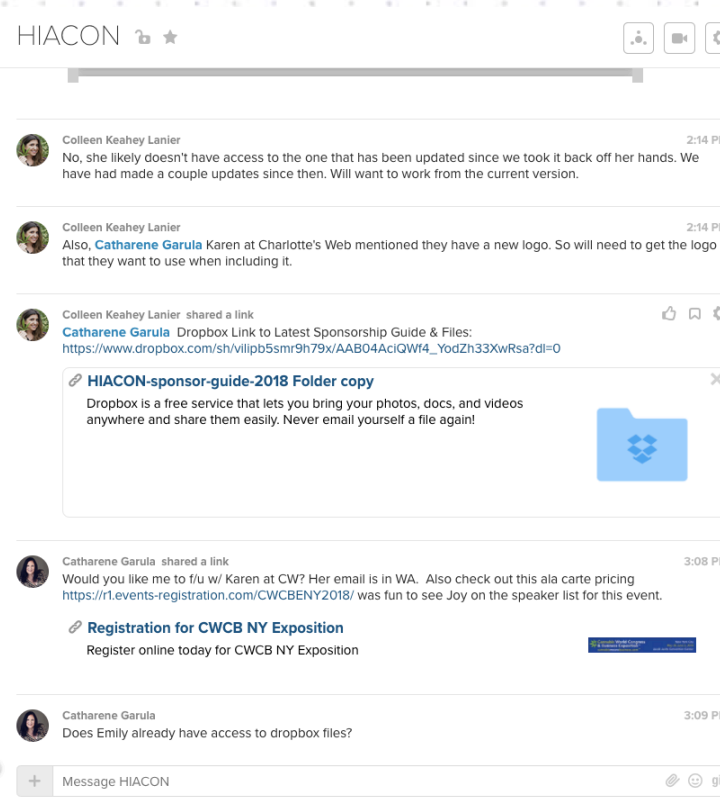
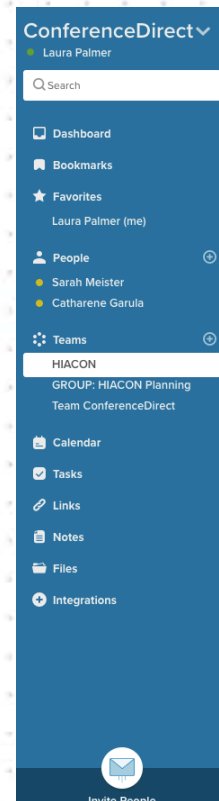
Action
Items



Timeline Tracking → Execution

Software/Apps

- Glip
- Slack
- Zoho



Planning Template – Basic / Simple



Name of Meeting Hotel Location Dates							
Date	Begin	End	Event	Location	Room Set-up	Post as	Additional Notes
			Setup		Setup: _____, podium, water, glasses pads of paper and pens at each seating, 2 sign easels AV: Internet: Other: No candy on tables	Post As: Do Not Post (DNP)	Please deliver all boxes address to _____ at ____ AM ORGANIZATION to provide laptop, LCD projector, flip chart pads of paper, markers, and wireless presentation mouse
			Breakfast		Set-Up: Buffet setup inside of the room, adequate bussing stations inside & outside of the meeting room Other: At ____ AM, please consolidate leftovers for morning break F&B: Please see F&B Tab, water stations	Post As:	
			____ Meeting		Setup: _____, podium, water, glasses pads of paper and pens at each seating, 2 sign easels AV: Internet: Other: No candy on tables	Post As:	ORGANIZATION to provide laptop, LCD projector, flip chart pads of paper, markers, and wireless presentation mouse
			AM Break		Set-Up: Please refresh existing setup Other: F&B: Please see F&B Tab	DNP	
			Lunch		Set-Up: Please refresh existing setup Other: F&B: Please see F&B Tab	Post As:	
			PM Break		Set-Up: Please refresh existing setup Other: F&B: Please see F&B Tab	DNP	
			Breakfast		Set-Up: Buffet setup inside of the room, adequate bussing stations inside & outside of the meeting room Other: At ____ AM, please consolidate leftovers for morning break F&B: Please see F&B Tab, water stations	Post As:	

Items to include:

- Date
- Times
- Event
- Location
- Room set
- AV
- Internet
- Are you providing anything?
- F&B (Food and Beverage)



U.S. DEPARTMENT OF HOUSING
AND URBAN DEVELOPMENT

NATIONAL ENVIRONMENTAL
HEALTH ASSOCIATION

OFFICE OF LEAD HAZARD CONTROL
AND HEALTHY HOMES
Division • State • Family • Community

NEHA 2018 AEC and HUD Healthy Homes Conference

Anaheim • California • June 25-28, 2018

 Green & Healthy Homes Initiative®

- | Date/Time | Event/Description | Number of People | Price Per Person/Dozen | Total | | Service Fee | |
|---------------|-------------------|------------------|------------------------|--------|--|-------------|--|
| Date | | | | | | Tax | |
| Breakfast | | | | \$0.00 | | | |
| Time | | | | \$0.00 | | | |
| | | | | \$0.00 | | | |
| | | | Total | \$0.00 | | | |
| | | | Service Charge | \$0.00 | | | |
| | | | Food + Service Charge | \$0.00 | | | |
| | | | Tax | \$0.00 | | | |
| | | | Total | \$0.00 | | \$0.00 | |
| Morning Break | | | | \$0.00 | | | |
| Time | | | | \$0.00 | | | |
| | | | | \$0.00 | | | |
| | | | | \$0.00 | | | |
| | | | Total | \$0.00 | | | |
| | | | Service Charge | \$0.00 | | | |
| | | | Food + Service Charge | \$0.00 | | | |
| | | | Tax | \$0.00 | | | |
| | | | Total | \$0.00 | | \$0.00 | |

Planning Template – F&B



Date/Time	Event/Description	Number of People	Price Per Person/Dozen	Total	Service Fee	25%
					Tax	11.50%
GENERAL BREAKS						
Thursday, April 19						
AM Break		1275/1417				
10:00 AM - 10:30 AM						
Riverwalk A/B						
	Cinnamon Rolls	65	\$54.00	\$3,510.00		
	Brioche	65	\$54.00	\$3,510.00		
	Whole Fruit	405	\$3.60	\$1,458.00		
	Coffee	41	\$130.50	\$5,350.50		
	Decaf	20	\$130.50	\$2,610.00		
	Hot Tea	10	\$130.50	\$1,305.00		
	Juice	33	\$99.00	\$3,267.00		
			Total	\$21,010.50		
			Service Charge	\$5,252.63		
			Food + Service Charge	\$26,263.13		
			Tax	\$3,020.26		
			Total	\$29,283.38		
					\$29,283.38	

Planning Template



2018 SIOP Conference - Event Matrix													
File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive													
70% \$ % .0 .00 123 Arial 10 B I S A													
fx Max Rounds													
29	Tuesday	9:00 PM	6:30 AM	Riverwalk Promenade/Riverwalk A		Security			Hughes				
30	Wednesday, April 18, 2018												
31	Day	Start	End	Room	Room Size	Title	Session #	Info	Contact Name	Format	Ppt/Setup	Std AV	Comment
32	Wednesday	12:00 AM	12:00 PM	Ballroom Office		Storage/Office			Hughes, Baker		Tables and chairs around perimeter		REKEY
33	Wednesday	12:00 AM	12:00 PM	Illinois Boardroom		Committee Room 1			Kealy		Conference for 16		
34	Wednesday	12:00 AM	12:00 PM	Tennessee		Committee Room 2			Kealy		Theater for 32		
35	Wednesday	12:00 AM	12:00 PM	Lincoln Boardroom		Committee Room 3			Kealy				
36	Wednesday	12:00 AM	12:00 PM	Riverwalk A/B		Decorating Exhibitors Move In			Vanneman, GES		GES Alyson Miller		Exhibitor Set-up 12-4
37	Wednesday	7:00 AM	7:00 PM	Convention Registration Office 2		Mothering Room			Vanneman		2 Comfortable Chairs		Small refrigerator Please do not lock
38	Wednesday	7:15 AM	8:00 PM	Riverwalk Promenade		Workshop/Consortia Registration			Case, Lentz		Built-ins	No	8 computers, 8 Barcode scanner SIOP to provide: 4 computers, 4 Trash Pick-Up: 6:30 AM, 9 AM
39	Wednesday	7:15 AM	8:00 PM	Riverwalk Promenade		Hospitality Desk					6 ft table		
40	Wednesday	7:15 AM	8:00 PM	Riverwalk Promenade		Fun Run Desk					6 ft table		
41	Wednesday	7:30 AM	8:30 AM	Chicago Ballroom Promenade		Workshop-Consortia Breakfast			Hughes		475 Flow Scattered highboys		
42	Wednesday	8:00 AM	8:30 AM	Sheraton II		Consortia General Session			Hughes Wendy Bedwell paceconsultingsolutionsllc@gmail.com		Max Rounds	Yes	
43	Wednesday	8:30 AM	4:30 PM	Sheraton I		Masters Consortium			Hughes Katherine Sitter & Ms. Erin Wood	Meeting	Classroom	Yes	
44	Wednesday	8:30 AM	4:30 PM	Columbus A	31	Doctoral Consortium			Kealy Jenna Shapiro & Dr. Lawrence Houston	Meeting	Max Theater	Yes	
45	Wednesday	8:30 AM	4:30 PM	Columbus B	31	Doctoral Subgroup Applied			Kealy	Meeting	Max Theater	Yes	
46	Wednesday	8:30 AM	4:30 PM	Sheraton III		Early Career Practitioner Consortium			Hughes Vince Conte or Ashley Guldrotz	Meeting	10 Rounds	Yes	
47	Wednesday	8:30 AM	4:30 PM	Mayfair		Junior Faculty Consortium			Kealy Tyree Mitchell or Lars Johnson	Meeting	Classroom	Yes	
48	Wednesday	8:30 AM	5:00 PM	Michigan B	70	Leadership Development Programs: Current State and State of the Art			Kealy	Workshop 10	Rounds Head Table	No	Screen, LCD, 1 lav, 2 flipcharts v
49	Wednesday	8:30 AM	5:00 PM	Erie	70	Storytelling with Impact: Mastering the Practical Science of Influential Communication			Kealy	Workshop 9	Rounds Pens/pencils and pads of paper Head Table	No	Screen, LCD, 2 lavs, computer s
50	Wednesday	8:30 AM	5:00 PM	Superior B	60	Individual Leadership Assessment: An Overview for Experienced Assessors			Kealy	Workshop 11	5 Rounds of 8 2- Head Tables Pens/pencils and pads of paper Arrange chairs so they have a good view of the presenters Soaker table and chairs	No	Screen, LCD, 3 lavs, WIFI, 6 flip for computer batteries at each ta Masking tape



ConferenceDirect®

Planning Software

- E-touches
- Whova
- Cvent

The screenshot shows a web browser window with the URL "eiseverywhere.com". At the top, there are two buttons: "Save & Stay" and "Save & Exit". Below these is a section titled "General details" with a dropdown arrow. The form includes the following fields:

- Room Name: ROOM A
- Dates: ☒ Thu 09/08/2016, ☐ Fri 09/09/2016
- Capacity: 100
- Setup: Other (dropdown menu)
- Rows: 1 (dropdown menu)
- ☐ 24 Hour Hold/Overnight
- Notes: (empty text area)

Below the "General details" section is another section titled "Room A/V requirements" with a dropdown arrow. Under this section, there is a "Lighting" category. It contains two boxes:

- Gobo Style 2 Uplighting (Decor)
- Gobo Style 1 Lights (Presenter) Stage Wash 1

Between these two boxes are "Add" and "Remove" buttons with right and left arrow icons respectively.

Registration

WHAT information do you need to collect?

First Name	Last Name	Title	Organization	Address	City	State	Zip	Phone #	Email	Cell Phone	Emergency Contact	Hotel Arrival Date	Hotel Departure Date	Room Type	Hotel Confirmation Number	Billing Information

How many people are you collecting the info from?

- Manual Tracking
- Data Collection: Survey Monkey, GoogleForms
- Fee Collection: RegOnline, Weems, Eventbrite



We'd love to hear from you!

lindsey.white@conferencedirect.com
laura.palmer@conferencedirect.com



EXHIBITORS

The Icing on Your
Conference Cake

Bob Custard, REHS, CP-FS

Environmental Health Leadership Partners, LLC

Why Exhibitors?

- Enhanced EH learning experience
- Conference revenue



What Do Exhibitors Want Most?

**Quality
Facetime**

An Exhibitor Wants To ...

- **Build brand recognition**
- **Explain the value of their product or service**
- **Identify potential customers**
- **Talk with people who can influence their customers**

Help Exhibitors Build Brand Recognition through...

- **Recognition from podium**
- **Named sponsorships**
 - Breaks, Meals, Events
- **Program advertising**
- **Conference web site**

Drive Traffic To Exhibit Area With ...

- **Exhibits located in traffic flow**
- **Longer breaks**
- **Food in exhibit area**
- **Fun atmosphere**
- **Useful* exhibitor tchotchkes**
- **Exhibitor “bingo cards” as prize drawing entries**

Help Exhibitors Engage Attendees and Add to the Learning Experience in Meaningful Ways

- **EH learning experiences and demonstrations at exhibit booths**
- **Learn EH facts and information from exhibitors to earn CE credits**

Ways for Exhibitors to Capture Attendee Contact Information

- **Attendee name badges**
- **Business card drop boxes**
- **Information request forms**
 - **Paper**
 - **Email**

Marketing to Exhibitors

- **Start early – exhibitors need plenty of lead time to plan and budget for travel**
- **Personal contact with potential exhibitors**
- **Clear information packet**
 - **Clear expectations for host & exhibitors**
 - **Directions to hotel and exhibit venue**
 - **Details on exhibit setup & tear down, exhibit hours**
 - **Draft conference agenda**
- **Easy exhibitor registration process**

Two Cautions

- In marketing to exhibitors, be careful to avoid potential conflicts of interest if you are a regulator.
- Speaking slots should not be for sale in exchange for agreements to exhibit. No infomercials! However, some exhibitors are great speakers.

Program Design

- **Limit exhibit time to 24 hours max**
 - **Time = \$\$**
- **Longer breaks to give exhibitors time to engage attendees**
- **An evening reception in exhibit area if a multi-day conference**

Logistics

- **Tables, table skirts, chairs**
- **Trash cans & trash removal**
- **Utilities – electric, internet, water**
- **Easy set up & tear down -help schlepping their stuff, luggage carts**

Exhibitor Fees

- **Typically \$1-\$3 per attendee with a \$200 minimum**
- **Additional charges for**
 - **Prime space**
 - **Utilities – electric, internet, water, etc.**
 - **Event sponsorships**
 - **Program advertising**
 - **Web site advertising**

Exhibitor Retention

- **Proactive exhibitor coordinator**
- **Goody bag for exhibitors (water, snacks, etc.)**
- **Caterer/server to bring exhibitors coffee, break food, etc.**
- **Exit interview soliciting feedback**
- **Personal thank you note to exhibitors**
- **Opportunity to immediately sign up for next year at a discount**

Contact
Information

Bob Custard

NEHA Past President

BobCustard@comcast.net

**Environmental Health
Leadership Partners, LLC**

