

**ASSOCIATION FOR CONTINUING HIGHER EDUCATION**

**GUIDELINES**

**FOR THE**

**PROGRAM COMMITTEE**

**AND THE**

**LOCAL ARRANGEMENTS COMMITTEE**

Approved by:

Board of Directors  
November, 1989

Revised and Corrected:  
October, 2007\*

**\*All Guidelines under Local Arrangements Committee are subject to change in 2009.**

## INTRODUCTION AND ACKNOWLEDGEMENTS

The "Program and Local Arrangements Guide" for the Association for Continuing Higher Education is designed to assist those Association members with responsibility for ACHE's Program Committee and for its Local Arrangements Committee with the "collective memory" of the Association. It is the work primarily of Charles F. Falk who drafted the original working document in 1987. It was adopted by Board action in November, 1989, and has been revised periodically since then.

Each year, those responsible for the Association's work with Program and with Local Arrangements report that their most helpful resources are those who have preceded them. The most recent Program and Local Arrangements Chairs are:

	<u>Program</u>	<u>Local Arrangements</u>
Roanoke (2007)	David Grebel	Dave Waterman/ Dan Dowdy
Los Angeles (2006)	Rick Osborn John Yates	Jan Jackson Dennis "Skip" Parks
Madison (2005)	Chris Dougherty Roxanne Gonzales	Roger Maclean
Newport (2004)	Ron Blankenstein	Phil Sisson
Charlottesville (2003)	Regis Gilman Dennis "Skip" Parks	James Baker
Birmingham (2002)	Donna Keene	Sallie Dunphy Philip Whatley
Vancouver (2001)	Art Hoover	Penny Southby
Myrtle Beach (2000)	Patricia Szymurski	Peter Balsamo

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## **PREFACE**

The Annual Conference and Meeting of the Association for Continuing Higher Education (ACHE) is the organization's most visible activity. Membership surveys reveal that the opportunity to attend and participate in the program at the Annual Conference and Meeting is one of the most compelling reasons why membership in ACHE is valued. The significance of the program to the Association requires that the event be designed and implemented with great care each year. The purpose of this notebook is to provide guidance and assistance to those with responsibility for planning and implementing this important event. The notebook is intended to serve as the framework established by the Board of Directors within which the Program and Local Arrangements Committees plan and conduct the Annual Conference and Meeting.

In its distinguished history of over sixty-five years, ACHE has held many outstanding meetings. To a great extent, the guidance given to those with responsibility for developing these programs had been limited, but sketchy Guidelines have been given to program and local arrangements personnel; much of what one needed to know was passed along by word-of-mouth from one year to the next. In some cases, the information passed along was adequate; in others, it was not. Thus, by not capturing, or not systematically passing on information developed from the past experience, the association may have lost insights and experiences which could have contributed to better programs and/or arrangements for this flagship event.

This notebook represents an effort to remedy this situation. It is hoped that the information presented in the following pages will provide useful assistance to members who may become involved in future efforts to plan and implement the program and local arrangements for the Annual Conference and Meeting of ACHE.

While offering direction for the future, it is important to note that the advice and counsel offered in this document is not intended as a precise and inflexible series of mandates. Many observers will agree that the Annual Conference and Meeting has evolved and changed significantly in the last several years. New ACHE officers, new Program or Local Arrangements Committee personnel, unique opportunities associated with meeting sites, and changing environmental factors have contributed to improvements and/or changes in the style, content, and scope of the Annual Conference and Meeting. It is likely that these factors will continue to influence the nature of the Annual Conference and Meeting in the future. These guidelines, while offering some benchmarks and minimum standards for the program, are not intended to preclude additional change and experimentation, nor are they intended to take flexibility away from future Program Committee and Local Arrangement Committee Chairs.

## I. INTRODUCTION

This planning guide for the Annual Conference and Meeting of the Association for Continuing Higher Education provides the Guidelines by which the Program Committee and the Local Arrangements Committee will complete their tasks under the direction of the Board of Directors.

The guide is prepared in notebook format for the following reasons:

1. Among the most important elements of the Notebook will be the materials appended on an ongoing basis in Appendices B and C. The "institutional memory" of the successive Program Committees and Local Arrangements Committees should, so much as is possible, be committed to writing and included as specified elements of this notebook. The notebook format permits ready addition of these reports. Note that the document calls for the most recent three reports. It might be valuable to retain as many as a large notebook will contain.
2. The Board of Directors is responsible for the growth and continued development of the Association. The notebook includes as its first substantive chapter a section for specifying Board action relative to the Annual Conference and Meeting. It may be that revision of the notebook will be mandated by some Board actions. In other cases, the notebook format will make it possible to establish and maintain an ongoing record of such action for the information of those responsible for the Annual Conference and Meeting.
3. The Notebook is intended to be an inclusive and exhaustive compilation of the elements necessary and to be helpful in planning and conducting the Annual Conference and Meeting for ACHE. As the Board, officers, or others responsible for the Annual Conference and Meeting identify other helpful inclusions for planning, this format will enhance the possibility of keeping everything in one place.
4. The Notebook need not have wide circulation. While it certainly should be available as needed to every member of ACHE, copies should be developed and updated for Board members and for the Program and Local Arrangements Committees as well perhaps for those preparing an invitation as a host institution. The notebook format is possible and economical for such a small number of copies.

## II. BOARD OF DIRECTORS

The Board of Directors is responsible for the growth and development of the Association for Continuing Higher Education, and the Board has approved these Guidelines as the planning outline for the Annual Conference and Meeting.

The Annual Conference and Meeting is the responsibility of two committees—the Program Committee and the Local Arrangements Committee. The succeeding two chapters outline the responsibilities and procedures for those committees. Note that the President-Elect appoints the Chair of the Program Committee.

For at least the most recent three annual conference and meetings, tradition has been held that the chairs of the upcoming Program Committee have served as the “Call for Proposals” Chairs. This has allowed for enhanced continuing and experience in the Leadership of the Program Committee.

It is also the responsibility of the Program and Local Arrangements Committees to ensure that the annual conference and meeting hotel, program sessions, and special events meet the provisions of the Americans with Disabilities Act. This federal statute requires that "No individual shall be discriminated against on the basis of disability in the full and equal enjoyment of the goods, services, facilities, advantages, or accommodations of any place of public accommodations." The registration form should include a space whereby a disabled person can request the "reasonable accommodations" required by the law.

### III. PROGRAM COMMITTEE

The Program Committee is responsible for planning, conducting, and evaluating the program for the Association for Continuing Higher Education Annual Conference and Meeting.

**It is important to note that by ACHE policy, its members cannot be paid honoraria or be offered expense reimbursement in exchange for any roles they might play in the program at the Annual Conference and Meeting.**

#### A. Guidelines

The following constitutional guidelines provide the framework in which the Program Committee conducts its work:

1. The President-Elect shall appoint a Chairperson of the Program Committee. Other members of the committee may be appointed by the President-Elect or recommended by the Chairperson and approved by the President-Elect. Consideration of persons located at or near the site of the Annual Conference and Meeting should enter into the selection of the Committee.
2. The Program Committee is to arrange the program and its presentation; secure speakers; and make all arrangements for the speakers. Note that the Local Arrangement Committee provides the budget for the speakers.
3. The Program Committee is responsible for someone to meet speakers as appropriate, and see to their comfort and their timely departure.
4. As far as possible, the membership should be used as program presenters.
5. The Program Committee shall be responsible for giving explicit instructions to all program participants on their roles and duties.
6. The Program Committee is to report the organization of a program to the Board of Directors.
7. The Program Committee is funded through the budget for the Annual Conference and Meeting which must be approved by the Board of Directors. Authorization to spend funds of the Association may not, except with the permission of the Board of Directors, exceed the amounts budgeted for the Annual Conference and Meeting.
8. The following deadlines are to be observed:
  - a) The theme and overall program plan to be developed by the mid-year Board of Directors' Meeting, and the Program Chairperson shall present these to the Board of Directors.
  - b) The Local Arrangement Committee is responsible for printing and mailing the annual conference and meeting program and any ancillary promotional material.

To enable the Local Arrangements Committee to do this in a timely manner, the Program Committee must complete its work so the first program or program summary mailing can be mailed by June 15. Local Arrangements can, of course, send an inexpensive "date holder" notice in advance of the initial program mailing.

- c) The second (and final) program shall be mailed by September 1.
- d) Brief articles on the program to be mailed to the Editor of the Journal by February 15 for Spring issue and by July 1 for the Fall issue.

(NOTE: Recent annual conference and meeting programs have been produced and distributed electronically, and additional "Day at a Glance" Guides have complemented those programs. Some attendees have commented that they prefer to receive a printed program onsite.)

- 9. The printed program for the Annual Conference and Meeting shall distinguish between workshops for individuals new to the field and other workshops.

The means by which the Program Committee is consistent with these guidelines and does its work, subject to the approval of the Board of Directors, are the subject of this chapter.

## **B. Composition of the Program Committee**

As noted above, the President-Elect appoints the Chair of the Program Committee (and its members). In addition to the Chair, the Chair of the Local Arrangements Committee (or his/her designate), and the Editor of the Proceedings, and about a dozen additional persons will make up the Program Committee.

In inviting persons to become members of the Program Committee, an effort is made to provide some broad-based representation of the types of individuals, institutions, and interests which comprise ACHE. For example, representation by several regions, public and private and large and small institutions, and persons with interests in credit and noncredit programs can be sought.

Members of the Program Committee are expected to attend a mid-year planning meeting—usually in February. No significant financial support is available, however, to reimburse committee members. The annual conference and meeting budget usually includes an expense line item for no more than \$3000 for all committee expenses. For economic reasons, a local person representing the Local Arrangements and Program Committee will attend the Midyear Board meeting to report on the upcoming conference. The Program Chairs have the capacity to define whether all members of the Program Committee must attend the February meeting.

## **C. Theme**

It is the custom of ACHE to have a "theme" for the Annual Conference and Meeting. The theme provides an umbrella, phrase or slogan that sets a context in which the program is developed. The theme is intended to provide "focus" for the program and suggests appropriate topics for major addresses, events, and activities.

Themes chosen for recent programs include:

"Refining Our Mission: Continuing Education's Role in Engagement, Outreach, and Public Service" (2007)

"Continuing Education: Making a Difference! (2006)

"Designing Our Destiny: Creative Responses to Change in Continuing Higher Education" (2005)

"Lifelong Learning: Crossing Bridges into New Territories" (2004)

"Continuing Education in the Era of Quantum Change" (2003)

"Pathways to Success: Teamwork, Leadership, and Change" (2002)

"Building Solid Communities Within Higher Education: Leadership, Connections and Commitment" (2001)

"Sharing the Vision, Leading the Way: Continuing Educators in the New Millennium" (2000)

"Centering on Students" (1999)

"Scholarship, Service, and Integrity: Benchmarks in a Changing Landscape" (1998)

"Changing the Rules: Access and Accessibility in an Information Age" (1997)

"Repositioning the Continuing Higher Education Agenda" (1996)

"Redefining the Continuing Education Classroom" (1995)

"Enhancing Continuing Education Through Partnerships" (1994)

"A Call To Consciousness: Continuing Education For a Global Perspective" (1993)

"Making a Difference: Creative Leadership in the 1990s" (1992)

"Renaissance Of the Individual: The Older Learner in the Next Century" (1991)

"Ethical and Quality Issues In Continuing Higher Education" (1990)

"Education for a Multicultural Society: A New Agenda for Continuing Higher Education" (1989)

"Continuing Higher Education: In Retrospect and Toward the Future" (1988)

"The Emerging Role of Continuing Education: Providers, Delivery Systems, and Services" (1987)

"Continuing Education: The Crucial Resource for Building People-Tool Partnerships" (1986)

"Meeting the Challenge for Change: New Demands and New Responses for Continuing Higher Education" (1985)

It is the prerogative of ACHE President-Elect to make the decision about the theme of the program during his/her presidential year.

In some cases, the President-Elect will have very definite ideas about a program theme and will simply present the theme to the Program Committee. Such direction may consist of just a phrase, or it may include a position paper or some other statement from the President-Elect which gives the Program Committee Chair and members of the committee specific direction about how to shape the program.

In other cases, the President-Elect will rely on the Program Committee Chair and members of the Program Committee to develop the theme. Once a theme is approved by the President-Elect, the Program Committee begins its work.

Factors to consider as a theme is selected include the following:

1. Is the theme sufficiently different from that used in recent ACHE programs?
2. Is the theme sufficiently different from those recently chosen by competing organizations for their own national meetings? (As AAACE and UCEA themes in particular.)
3. Does the theme touch upon an issue, trend or opportunity of likely interest to ACHE constituency?
4. Is a theme "catchy" or cumbersome? Can it be used effectively in marketing the Annual Conference and Meeting?

While a theme may have some importance for the program, care is suggested so that a quest for the elusive "ideal" theme does not consume an inordinate portion of the limited planning time available to the Program Committee.

#### **D. Format**

While the Program Committee has flexibility in determining the format of the Annual Conference and Meeting, subject to the approval of the President and the Board of Directors, the following format is recommended as the "starting point":

##### Saturday

- |              |                           |
|--------------|---------------------------|
| 8:00-4:00    | Board of Directors        |
| 12:00 - 1:00 | Board Luncheon            |
| 4:30 - 5:30  | Program Committee Meeting |

##### Sunday

- |               |  |
|---------------|--|
| 8:00 - 11:00  | Leadership Institute for Regional Chairs |
| 11:15 – 12:00 | "Welcome to First-Timers" Session        |
| 11:45 - 12:45 | Past Presidents' Luncheon                |

11:45 - 1:30	2008 Program Committee Meeting
1:45 – 3:00	Welcome and General Session
3:15 - 4:05	Concurrents
4:35 - 5:35	Regional Business Meetings
6:30 – 9:00	Opening Reception

Monday

7:30 – 9:00	Breakfast with Sponsors
9:15 - 10:30	General Session
10:45-11:45	Annual Business Meeting
12:00 - 1:30	Awards Luncheon
1:40 - 2:30	Concurrents
2:40 - 3:30	Concurrents
3:45 – 5:00	Town Meeting
6:00 - 8:00	Reception
	Dinner on your own Special (optional) Events

Tuesday

7:45 – 8:30	Continental Breakfast - Networking
8:30 - 9:20	Concurrents
9:30 – 10:20	Concurrents
10:45 – 11:45	General Session
12:00 – 1:15	Inaugural Luncheon
2:30 - 4:30	Board of Directors Meeting
1:30 - 4:30	Value Added Workshops

Wednesday

8:00 – 12:00	Board Meeting
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## E. Role of Program Committee/Call for Papers

The Program Committee, subject to the direction of the President-Elect, is responsible for the program at the Annual Conference and Meeting. The manner in which the Committee exercises that responsibility may vary from year to year. In the discussion above on setting the theme, for example, it was noted that the process may vary from being a function of the President-Elect providing a complete narrative to being a phrase used as an organizing principle.

There is "creative tension" for the Program Committee in fulfilling its responsibilities. To what extent should the Program Committee be reactive in having program content result from what comes in the mail in response to a call for papers? To what extent should the Program Committee be proactive in inviting speakers? How much budgetary support is available for the Program Committee to be creative in its planning of the program?

The answers to all these questions, and more, will vary from year to year. Committees will vary in their exercise of responsibility for the program in terms of what they seek as opposed to what is submitted. But, they cannot vary in that the Program Committee is responsible, through whatever means for developing and organizing a program helpful for actual and potential members of ACHE.

The Program Committee has generally used evaluations of past programs and reports from past Program Chairs in planning the program; the contents of this notebook are designed to help the Program Committee. Of great help in recent years has been the "Call for Proposals."

Since 1985, it has become ACHE custom to utilize a "Call for Proposals". "Calls" have been in common use among other professional organizations for years. The "Call" is a critical means not only for identifying program content for the Annual Conference and Meeting but also for developing member ownership for the program and reminding actual and potential members of the Annual Conference and Meeting. The form which the "Call" might take can vary according to the preferences of the Program Committee, but the "Call" should be prepared soon after the theme for the program has been determined. Further, the "Call" should be issued at the Annual Conference and Meeting immediately preceding its own scheduling and also be electronically posted about a year in advance of the meeting for which planning is taking place.

**The "Call" must include a clear (or highlighted) statement that registration fees are not waived for concurrent session presenters.**

The posting date is critical since potential respondents will need some time to complete their proposals. The general idea is that the Program Committee Chair will want to have responses to the "Call" available for the mid-year Program Committee meeting when most of the major decisions for the program will be made.

In addition to soliciting possible presentations and speeches, the "Call" serves other purposes as noted above. It serves as the first official notice of the next Annual Conference and Meeting of ACHE. The "Call" can prompt interested persons to "mark their calendars" with the dates of the next meeting at that time. Also the "Call" can be used to solicit individuals who might like to serve in other capacities at the Annual Conference

and Meeting—specifically, it is a way to obtain names of potential presidors/moderators which are needed for the program's sessions.

As the program for the Annual Conference and Meeting continues to develop, the Call for Proposals may well expand to serve as even more a call for nominations for invited talks.

## **F. General Sessions**

It is both a custom of the organization—and an expectation of the participants—that the program each year will include a number of large audience general sessions. Increasingly, it is expected that the general sessions will feature "well-known" speakers who come from outside ACHE, and in many cases, from outside continuing education to present information, ideas, points of view, or experiences which are stimulating, challenging, and informative.

Attracting "renowned" speakers to the Annual Conference and Meeting has become possible through funds made available to the Program Committee for this purpose. Improved funding notwithstanding, many name speakers will still be financially out of reach for the Association.

There is no established number of general sessions which should be scheduled or included in the program. In the past, as few as two and as many as four have been planned. Scheduling a particular number of general sessions will be determined by opportunities presented to the Program Committee and from the relevance of general sessions to the overall program concept.

It should be noted that the identification and invitation of such speakers is a primary responsibility for the Program Committee. Broad representation on the Committee will help ensure the capacity of ACHE to "cast a wide net" in the identification of suitable speakers for these plenary sessions.

## **G. Concurrent Sessions**

The bulk of ACHE program each year consists of small group activities: workshops, lectures, panels, poster sessions, demonstrations, and similar activities. For many participants, these concurrent sessions are more important than the general sessions. In the small group sessions, more immediately and directly applicable knowledge and skills are imparted.

As with the general sessions, there is no magic number of small group activities. Some guidelines are the following:

1. The number of small group activities should be sufficient to attract and serve the many interest groups and constituencies which make up ACHE. In other words, try to have something going on which will interest everyone.
2. While it is important to provide a number of alternatives, it is also important to avoid a circumstance when the total number of activities occurring at one time is so large that, of necessity, only a small audience will attend each session—possibly causing a

presenter to wonder if time and effort has been well spent.

3. Careful attention in matching concurrent sessions to appropriate spaces in the meeting facility is required.
4. The nature of ACHE membership is very diverse. Many members who will attend the Annual Conference and Meeting are senior personnel—deans, directors, vice-presidents—who are in charge of continuing education programs in their respective institutions. Others in attendance may be very new and very inexperienced persons who function in program development, program or conference coordination, or instruction or design specialist roles. Many are experienced persons holding positions somewhere in the middle management ranks of the continuing education organization. Such members may have responsibilities for constituency-based programs (older adults, management development, public school personnel, etc.) or may be specialists in student counseling, advertising, registration, instructional technology, and similar roles.

Members' responsibilities vary along credit and noncredit lines. Each participant will look at the program from the point of view of particular needs and interests. As noted above, it is important to try to have something of interest to each person in attendance at the meeting.

5. Small group sessions should be selected or designed with an eye toward optimizing interaction of the participants and the presenters/resource persons. Evaluation of past programs reveals a strong desire among participants for fewer program segments where someone "talks at" the audience, and for more program segments which offer more opportunities for interaction and involvement.
6. Persons attending the Annual Conference and Meeting have reported that handouts are very helpful. Presenters should be made aware of this interest and informed that they are responsible for copies.
7. **Remember to include in the Concurrent Sessions a slot for the Research award recipient and the Crystal Marketing award recipient.**

## **H. Role of Other Committees**

The Program Committee is charged with developing the program for the Annual Conference and Meeting. Since the Annual Conference and Meeting represents the "annual gathering of ACHE members", many committees, networks, and other groups find the Annual Conference and Meeting the only time at which they are able to meet together to plan their work, to seek input from the membership in general, or to share their own work.

Committees and networks are active at the Annual Conference and Meeting in two ways. Sometimes, they will want to have their work, or work in which they are interested in included in the program. In such cases, the Chair of the interested network or committee is required to respond to the "Call for Proposals" and submit a proposal for Program Committee consideration. In other cases, meetings of various committees and networks

are structured as part of the Program and listed in the schedule for the Annual Conference and Meeting.

The committee that has the strongest relationship to the Program Committee is the Local Arrangements Committee. The Chairs of the two Committees sit on both committees. The Program Committee cannot complete its work without the active participation and support of the Local Arrangements Committee. While the following chapter outlines the work of the Local Arrangements Committee in detail, it is not possible to overstate the critical importance of excellent communication and cooperation between these two groups. There might be merit in having at least one joint meeting of the two groups—perhaps at the mid-year meeting of the Program Committee.

## **I. Other Program Considerations**

In developing the program for the Annual Conference and Meeting, the Program Committee should be sensitive to many traditions which have been developed in ACHE over the years. As people come and go, and as the times change so to have some of the traditions.

Because many aspects of ACHE's approach to the Annual Conference and Meeting are undergoing change, the best advice to the Program Committee is consultation with the officers and home office of the Association.

Some current examples of "obligatory" elements for the Annual Conference and Meeting include the following:

- Board of Directors Meetings (one before and one after the program starts and ends)

- Budget and Finance Committee Meeting

- Leadership Institute for Regional Chairs (Coordinated by the Vice President)

- Current Program Committee Meeting

- Next year's Program Committee Meeting (two sessions)

- Business Meeting

- Opening Reception (and sometimes Dinner)

- Regional Business Meetings

- Alpha Sigma Lambda Breakfast or event

- Past Presidents' Luncheon

- Closing Reception and Awards Banquet (modified for 2007—awards banquet changed to luncheon.)

In addition, the Program Committee should consider the following:

1. In addition to having an overall theme for the program, it has been common in the past to have sub-themes which focus upon sub-sets of the overall theme. Two options which might be used in taking the organization of the program to this next level include the following vertical or horizontal organizational patterns:
  - a) The vertical model involves establishing sub-themes or sub-topics for each day of the meeting, and slanting all content offered on this day toward the sub-theme.
  - b) The horizontal model involves having strands that weave horizontally through the program—something about each sub-theme is offered each day during the program.
2. One of the most important benefits of ACHE membership reported by ACHE members is the chance to meet and come to know their professional colleagues in the field. It is important that adequate time be built into the programs to permit informal interaction which promotes the development of the relationships which are considered so important by ACHE membership.
3. Exhibitors. Exhibits, sometimes are known as poster sessions, were first introduced to the annual conference and meeting at the Atlanta meeting in 1985. They remain a part of the current meeting design. In addition to providing an important revenue stream for the meeting, they are another form of activity for program participants. It is the Local Arrangements Committee and not the Program Committee which has responsibility for this dimension of the program. However, members of the Program Committee can contribute to this facet of the program by being alert to potential exhibitors and by referring anyone with a possible interest in exhibiting to the Chair of the Local Arrangements Committee.
4. Program Committee members should be aware that the hotel and meeting facility chosen for their program was, in most cases, selected three, four or more years in advance of the meeting for which they are planning the program. The local arrangements personnel choosing the hotel will have booked meeting spaces after having reviewed patterns of meeting room use in previous ACHE programs (See Appendices for sample conference room Accommodations).

It is critical that Program Committee members know exactly the number, type, and capacity of all rooms that will be available to them for the program which they are to design. Care must be taken to be sure that the facility needs of the program can be met by the facilities which have been reserved for ACHE Annual Conference and Meeting by the Chair of the Local Arrangements Committee. The Chair of the Program Committee should ascertain this information very early in the program planning process. Extreme caution is urged in any situation where the hotel will be required to sub-divide or reconfigure meeting room spaces in short turn-around time periods in order to meet ACHE needs. If not accomplished promptly and effectively, room configuration changes can wreak havoc on the timing of the whole meeting.

5. Another important facet of the Annual Conference and Meeting is a family member/guest program tailored to the needs of those who accompany members to the meeting, but who are not interested in the professional sessions. Experiments with the format of spouse/guest programs are ongoing, and the shape of this aspect of the program can be whatever seems appropriate from the perspective of the Local

Arrangements Committee and ACHE Board.

It is the Local Arrangements Committee which has the responsibility for the development, promotion, and implementation of this program. The Program Committee Chair must, however, know the details concerning these events,

## **J. Operation and Organization of the Program Committee**

The Program Committee has the principal responsibility for the design and implementation of the program at the Annual Conference and Meeting of the association. While many duties are stated or implied, the following list summarizes these responsibilities:

1. Designing the framework for the overall meeting.
2. Integrating obligatory functions into that framework (as business meetings, committee meetings, social and meal functions).
3. By issuing a "call for proposals" and other means, identifying and contacting the best possible speakers and resource persons for the program.
4. Negotiating with speakers and resource persons and reaching agreements about any honoraria, special services, or expense reimbursements to be provided as a condition of a person's becoming a part of ACHE program.
5. Soliciting information about speaker/resource persons' needs for accommodations, audio visual equipment, duplication services, or other supports; and taking the steps needed to assure that this support is properly rendered.
6. Providing on-site coordination services at the Annual Conference and Meeting by:
  - a) Making sure that scheduled speakers/resource persons have arrived, are made to feel welcome, and have appropriate support equipment and materials;
  - b) Assuring that sessions of the program start and finish on time;
  - c) Assuring that presiders and other program personnel are in place in the appropriate rooms at the appropriate times;
7. Designing and implementing a system for evaluating the satisfaction of the membership with the program.
8. Operating within the Board-approved budget for the program.
9. Closely cooperating with the Local Arrangements Committee and with the Editor of the Proceedings of the Annual Conference and Meeting.
10. Preparing a summary report outlining successes and problems associated with the planning and implementation of the program; and including suggestions for program committee personnel who may follow.

The Program Committee accomplishes these tasks in four meetings. The first two meetings occur at the Annual Conference and Meeting of the Association in the year prior to the year for which a Program Committee will have future program planning responsibility.

The third meeting takes place in mid-year, usually in February. The Chair of the Program Committee is expected to attend one day of the mid-year ACHE Board of Directors meeting to report the progress of the Program Committee. For economic reasons, a local person representing the Local Arrangements and Program Committee will attend the Midyear Board meeting to report on the upcoming conference.

The final meeting of the Program Committee takes place at the Annual Conference and Meeting for which the group has developed the program. In somewhat more detail, the purposes of these several meetings are indicated below:

Meeting #1. Meeting #1 will take place in the early afternoon on the first day of the previous Annual Conference and Meeting—and usually before any major sessions are scheduled. The purpose of this one hour meeting is to introduce all committee members to one another and to orient them to the task ahead, and to their particular responsibilities. At this meeting, the Program Committee Chair should be prepared to share with committee members any preliminary information that he/she has developed to facilitate the work of the committee—including concept papers, ideas for speakers, activities or presentations.

Meeting #2. The second meeting of the committee occurs during the context of the program. It is at this meeting that serious discussions of speakers, topics, and program concepts can be held.

Meeting #3. The third meeting is the mid-year Program Committee session. This will be discussed in detail below.

Meeting #4. The fourth meeting is held on the first day of the Annual Conference and Meeting for which the Program Committee has planned the program. This session is usually one hour in duration, and is intended as a last minute review of what is to occur during the ensuing period. This meeting can be used to communicate on-site coordinating or hosting assignments for members, and/or to discuss contingency plans that might be put in place if any of the scheduled speakers fail to appear.

It is possible to schedule additional meetings of the committee if logistics and timetables might permit. What has been outlined above is just that which has been customary.

One feature which will characterize all of these sessions is that they will be too brief. It is important for the Chair(s) of the Program Committee to be highly organized in order to make the maximum use of the limited time which the group will have together.

Individual Chairs may have their own ideas about what will work best for them, but however it may be done, it is essential that the Chair delegate some authority and responsibility for tasks to be accomplished by the Program Committee. It was noted earlier that the

program itself can be organized along "day" themes or by "strand" themes. Thus, one way to organize the committee is to name persons to be in charge of either days or strands, and to form sub-committees to work with day or strand theme sub-committee chairs.

A sub-committee could be asked to develop the evaluation instrument utilized by the Program Committee for its meeting. Other types of delegations could be made as might make sense to the Chair in terms of either his/her management style or as circumstances might deem wise.

The volume of correspondence for the Program Committee Chair can be minimized if sub-committee members work with and report to sub-committee chairs, and if sub-committee chairs, in turn, report to the Program Committee Chair. This subtlety should not be overlooked since the bulk of the Program Committee's work will have to be carried on over the phone and through emails. The use of listserv and internet enhances the speed and turn-around time of communications.

By using delegation, the Chair(s) can multiply his/her efforts and get more done with a smaller commitment of personal time. However, it is incumbent upon the Chair(s) that he/she follow-up and audit the progress of the work of the sub-committees. If follow-up is not practiced, and if a particular sub-committee is falling behind, or just not doing what it had committed to do, this could have disastrous consequences for the overall progress of the Program Committee.

The mid-year meeting of the Program Committee permits a sustained effort by the committee, working as a group, to brainstorm and accomplish most of the work of pulling the program together. Typically, it is scheduled to commence on a Saturday at about 3:00 p.m.; and to conclude the following Monday by around noon. Recent meetings have deviated from this schedule as needed. Between arrival and departure, members of this committee should expect to work hard and late.

The location of this meeting is left up to the discretion of the Program Committee Chair, who makes this decision in consultation with the President-Elect. The site for this meeting should, however, be selected with care; principally with reference to minimizing expenses for those who will be members of the committee. Again, one should be reminded that members of this committee are expected to cover most expenses for this meeting.

In many cases, there will be merit in having the mid-year meeting at the site of the Annual Conference and Meeting. When this can be done, there are the following advantages:

1. The Program Committee can tour the facilities in which the Annual Conference and Meeting and the Program will be held. The tour may identify problems or opportunities about which the Program Committee would not otherwise have been aware.
2. The Annual Conference and Meeting hotel may be generous by providing reasonable room rates and other amenities for the planning group.
3. The Local Arrangements Chair and his/her staff or colleagues will be in this locale and can make arrangements for the Program Committee's mid-year meeting. The two committees might well meet together briefly and then tour the facilities.

A number of tactics can be followed to assure that maximum benefit is derived from the mid-year meeting.

1. Schedule meals as group events so much as the Budget will allow this. Keeping the group together and focused upon the purpose of the gathering will help everyone get to know one another much more quickly, and forestall time wasted by moving about the area in search of restaurants.
2. Try to "confirm" all of the featured speakers before the committee departs from this meeting. By this it is suggested that:
  - a) The group come to closure as soon as possible and settle upon a desired list of persons whom they would like to see as the general session presenters.
  - b) The list of desired speakers should include more names than the minimum number needed to "cover" general sessions; and that priority numbers assigned to each desired speaker.
  - c) During the meeting, some members of the committee may be temporarily excused in order to make telephone calls to the desired speakers. From these calls, speaker interest, availability, and cost can be determined and committee members will know more quickly where they stand in terms of their chances of attracting particular resource people to the program.
3. Mention has been made earlier about delegation of responsibility to committee members, and of the formation of sub-committees. Some suggestions here include:
  - a) That some time during the mid-year meeting be provided for sub-committee meetings to meet apart from the committee as a whole. The sub-committees can develop smaller plans and agendas pertinent to their assigned tasks. These can then be reviewed for reaction by the larger group.
  - b) That at the close of the mid-year meeting, each member should leave with a clear understanding about what he/she is to do next, by what date, and for whom.

#### **K. Budgeting/Fiscal Policies and Procedures for Program Committee**

The "bookkeeper" and "banker" for the program are the local institutional host and the Chair(s) of the Local Arrangements Committee.

1. Speakers. Each year, the Board of Directors approves a budget for the Annual Conference and Meeting. Included in that budget are approved sums intended for honoraria and expense reimbursement for speakers/resource persons at the Annual Conference and Meeting. The amount of money set aside by the Board for this purpose has increased steadily in recent years. Increased funds for speakers have been provided for a number of reasons. These include:
  - a) The importance of being on the program in the minds of the membership.
  - b) Evidence of satisfaction with the recent trend of bringing to the program more key speakers who are not in continuing education or in education per se.

- c) A realization that ACHE has moved away from a posture of covering all small group sessions with no-cost ACHE member-speakers—and toward a posture of having more paid outside persons delivering several, but not all, of these program segments.
- d) Increasing costs for both honoraria and travel.

In approaching possible speakers, an offer can be made of expenses only, or of an honorarium and expenses. If expenses are to be paid, it should be made clear in writing to the parties involved about what is or is not included. For example, that ACHE will reimburse for coach class airfare only. Will we or will we not pay a claim for airport parking? For local mileage? For tips to baggage handlers or hotel porters? For phone calls back home, or to offices?

As a prudent business practice, keynote speakers should be issued a formal written letter of invitation which:

- a) Confirms the day, date, time, and location of the presentation.
- b) Confirms the title and/or content of the speech/presentation/ activity.
- c) Confirms the amount of any honorarium offered.
- d) Confirms the nature and amount of expenses for which reimbursement will be provided.
- e) Confirms other expectations of the speaker (that he/she will bring an abstract of his/her talk; will bring 50 hand-outs; will agree to be tape-recorded, etc.).
- f) Confirms when the speaker expects to arrive on-site and how he/she plans to get there (car, plane, riding with an ACHE member, etc.).
- g) Confirms that the speaker does or does not want a room reservation made for him/her (irrespective of whether ACHE is paying for it or not). Note that Local Arrangements Chair must be copied on all confirmations with speakers.
- h) Secures a social security number (chances are this will be needed later in order for the Local Arrangements/sponsoring institution to pay the person).

Taking the time to clarify all of these points limits the possibility of painful or embarrassing misunderstandings at a later point. To make sure this process works, send two copies of the letter of invitation to the speaker, and ask that he/she sign and return an "acknowledgment" copy to the Program Committee Chair in a postage paid envelope which has been included.

**It is important to note that by ACHE policy, its members cannot be paid honoraria or be offered expense reimbursement in exchange for any roles they might play in the program at the Annual Conference and Meeting.**

When possible, checks for honoraria are available at the meeting and are presented to the speakers upon the conclusion of their part of the program. Speakers receiving expense

reimbursement are asked to fill out the host institution's travel voucher forms and are reimbursed as soon as possible.

One final note about relationships with speakers. Many of these folks will not know much about ACHE or its purposes. Since it is generally desirable for a speaker to know about an audience, the Program Committee should take it upon itself to orient speakers who are to be part of the program. A brief written narrative has been used for this purpose in the past.

2. Meeting Registration Fee and Guest Speakers. Invited general session or special event speakers are not charged the meeting registration fee. Member and non-member concurrent session speakers are charged the registration fee. The registration fee payment requirement must be addressed clearly in the Call for Papers.

ACHE policy requires Presidential approval for any registration fee waiver. The Home Office Administrative Assistant and long-time member Alex Charters will receive complimentary registration.

Additionally, it is only courteous to ask keynote speakers to attend meal functions proximate to the time when they are to appear on ACHE program. This matter has been dealt with in the following manner in the past:

- a) In consultation with the President-Elect and the Local Arrangements Chair, speakers are invited by the Program Committee Chair to selectively participate in meal functions proximate to their presentations.
  - b) The speakers are given "speaker" badges which entitle them to participate in any of the non-meal functions as they might chose.
  - c) The cost of these meals is absorbed as a conference expense and is not "counted" against the Program Committee speaker expense budget. The Local Arrangements Chair must know of all such meals.
3. "Budget Expanders". While the Program Committee Chair will have a budget for speakers of a fixed sum, there are the following ways in which that sum can be expanded or stretched:

- a) Complimentary Rooms. The negotiations with the conference hotel will have a provision which will give ACHE a number of complimentary room nights (comps). A ratio of one free room-night for each fifty room nights booked by meeting participants is common. The comps are intended to provide no cost accommodations for the President, Executive Vice President, Home Office Administrative Assistant and other officers as possible.

Participant bookings for a typical ACHE meeting might result in 12-20 free comps. By working closely with the Local Arrangements Committee Chair, the Program Chair might use some of these comps as part of his/her negotiations with speakers. In the absence of the comps, the lodging costs for speakers would have to be charged against the budgeted amount.

- b) Complimentary Airline Tickets. Airlines operate in a manner similar to the hotels. If

an airline is designated the "official carrier for ACHE meeting," a particular code number is assigned to ACHE meeting by that airline. While it varies from carrier to carrier, usually if fifty people book their air travel arrangements with the official air carrier, ACHE gets a free ticket. The Program Committee Chair can, with the consent of the Local Arrangements Committee Chair, use this ticket for one of the speakers and, thereby, expand the program budget further by the value of the ticket.

One problem with the complimentary airline ticket is that it might not be known until too late that the ticket will be available. In other words, the speakers will have to be committed before it is known if a ticket will have been earned by the Association. The Program Chair will need to check to see if a ticket left over from a previous year's meeting (because of late knowledge of a ticket having been earned) can be used as budget expander for the current year.

Car rental companies operate on the same premise. The Program Committee Chair should inquire about the availability of this potential resource.

4. Mechanics of Payments/Reimbursements. The sponsoring institution is responsible for paying all bills associated with the program at the Annual Conference and Meeting. For this reason, the Program Committee Chair should familiarize himself/herself with the reimbursement procedures to be followed. The Program Committee Chair and/or his/her designees will be managing relationships with speakers and should be in a position to tell speakers what, if anything, they will have to sign and how long it will take to receive expense reimbursement. Once again, an effort should be made to obtain social security numbers from all presenters who are to be paid for anything—they'll probably be needed later.
5. Program Committee Operating Expenses. In addition to payments for speakers, and to payments to the conference hotel, the sponsoring institution shall also reimburse the Program Committee for the budgeted expenses. The Program Committee Chair shall direct bills for these items to the Local Arrangements Chair for payment.

It is possible, possibly desirable, and in some cases it may be required that the Program Committee Chair indemnify his/her own institution from bearing the brunt of too many local costs associated with the Chair's role in planning of ACHE program. Depending on the host institutions procedures, a local account, established in the Program Committee Chair's home institution, might be used to accumulate ACHE expenses for duplicating, long distance phone calls, postage, or similar cost items.

## **L. Publications Committee**

Each year, the President-Elect appoints an Editor of the Proceedings for the next Annual Conference and Meeting. This appointment is made in consultation with the Chair of the Publications Committee. The Proceedings Editor is responsible for capturing the content of the Annual Conference and Meeting and subsequently producing a high quality "proceedings" as soon as possible following the close of the meeting. The Editor automatically becomes a member of the Program Committee.

The major opportunities for cooperation between the Program Committee Chair and the Editor include the following:

1. The Program Chair will include a letter from the Editor of the Proceedings in the packet sent to participants in concurrent sessions. This letter explains how presenters should forward the information on their presentations to the Editor. Currently presenters are asked to send their material as a Microsoft Word attachment via email.
2. The Program Chair will facilitate contact among the Editor, the day chairs and the presenters to encourage presenters to turn in their presentations.
3. The Editor is responsible for:
  - a) seeing that material for the Proceedings is received from presenters of general sessions, presenters at concurrent sessions, committee chairs, and other persons to see that all events at the conference are covered.
  - b) editing, and arranging for the disseminating of the Proceedings. Production costs are a line item in ACHE operational budget.
  - c) keeping records on how the task was accomplished and seeing that a successor editor knows in detail how the task was accomplished in the previous year.

#### **M. Program Evaluation**

Since most continuing educators make it a practice to evaluate programs they conduct in their own institutions, it should not be a surprise that ACHE is anxious for its own program to be evaluated. Thus, program participants have been asked to complete evaluation sheets during the context of the meeting each year or online.

#### **IV. LOCAL ARRANGEMENTS COMMITTEE – All Guidelines under Local Arrangements Committee are subject to change in 2009.**

The Local Arrangements Committee is responsible for planning, conducting, and evaluating the logistical and other local arrangements for ACHE Annual Conference and Meeting.

The Chair of the Local Arrangements Committee is usually identified by the host institution through the invitation procedure. Acting with advice and counsel from the Local Arrangements Chair, the President-Elect appoints members of the Committee.

The Association strongly encourages Local Arrangements Chairs to include other local institutions in the many hosting functions. Building an ad hoc “coalition” can increase access to local resources, including facilities, AV equipment, and staffing.

**It is important to note that by ACHE policy, its members cannot be paid honoraria or be offered expense reimbursement in exchange for any roles they might play in the program at the Annual Conference and Meeting.**

## A. Guidelines

The Local Arrangements Committee is responsible for planning, conducting, and evaluating the logistical and other local arrangements for the Annual Conference and Meeting of the Association.

The following constitutional guidelines provide the framework in which the Local Arrangements Committee completes its work:

1. The Local Arrangements Committee shall recommend the facility or facilities which will house the annual conference and meeting. The facilities must comply with ADA standards.
2. Upon approval of the facility or facilities, the Local Arrangements Committee shall reserve and complete all local arrangements for space in the facility or facilities.
3. Approximately one year prior to the annual conference and meeting, the Local Arrangements Committee shall sign an agreement with the facility in which the rates and space are guaranteed to the Association and the Association guarantees to hold the meeting in the facility. **For the 2009 Annual Meeting and Conference, the Board hired a meeting planner MSP, Inc. to negotiate hotel arrangements and assist with operations. (See Appendices for contract.)**
4. The facility shall guarantee adequate space for general meetings and small meetings without cost to the Association.
5. The facility shall furnish without charge suites for the President and Executive Vice-President. If insufficient rooms are booked, ACHE shall pay for these suites. If the facility provides rooms on a lesser booking, the Board shall determine who shall occupy any excess complimentary rooms. (After Keynote Speakers rooms are covered.)
6. The Local Arrangements Committee shall furnish without cost to the Association a headquarters room. Hospitality rooms if deemed desirable shall also be furnished without cost to the Association.
7. In selecting accommodations for the annual conference and meeting, it is recommended that the location in regard to the hub of activity in the city be considered.
8. The facilities should be attractive with adequate rooms, medium rates, and convenient to parking for those who drive.
9. All liaison and arrangements for facilities shall be through the Local Arrangements Chairperson.
10. The Local Arrangements Committee shall meet at least once during the year.
11. A bulletin board for announcements and messages shall be maintained near the registration information desk.

12. The Local Arrangements Committee is not authorized to charge the annual conference and meeting budget for expenses incurred in committee travel to prior year(s) annual conference and meeting(s).

**Role of the Local Arrangements Committee.** The Local Arrangements Committee is charged with responsibility for insuring effective and efficient arrangements for the Annual Conference and Meeting. Specific responsibilities, addressed in the following sections, include the following:

1. Hotel and Meeting Space
  - a) Hotel Arrangements
  - b) Meeting Spaces
  - c) Audiovisual Support
  - d) Meals/other functions
2. Budget/Fiscal Management/Reporting
3. Guest Program
4. On-site Management
  - a) Registration
  - b) Headquarters Room
5. Exhibits/Sponsors
6. Amenities
7. Evaluation
8. Marketing and Printing

**B. Hotel and Meeting Space**

**(This process will be changed for the 2009 Annual Meeting and Conference in Philadelphia according to the Board's contract with MSP, Inc.)**

The process by which the Association for Continuing Higher Education selects sites for the Annual Conference and Meeting involves early consideration of the facility which will house the Annual Conference and Meeting. The Board of Directors considers invitations from member institutions to host the Annual Conference and Meetings. These invitations, generally coordinated in conjunction with convention and visitors' bureaus and hotel/meeting facilities of possible host cities, include projected information on overnight room rates, support, and amenities associated with the Annual Conference and Meeting being held in a particular city. The timing is generally between October 15 and November 15.

It is important to note, however, that ACHE looks to an institutional sponsor which is then responsible for the contractual arrangements for the Annual Conference and Meeting. ACHE enters into a formal contractual agreement with the host institution;

however, it relies on the goodwill and professionalism of the host institution as the key factors guaranteeing the success of the Annual Conference and Meeting.

It is not ACHE which signs the contract with the hotel but rather the local institution, generally the institution of the Chair of the Local Arrangements Committee.

It is also important to note the Board does not regard the "hosting" function to be a revenue-generating venture for the host institution. While the Board expects the meeting budget to recover out-of-pocket costs, it does not routinely pay overhead fees to host institutions. ACHE shall pay to the host institution an administrative fee of 7.5% of the gross conference revenue.

When extenuating circumstances occur (e.g., the hotel closing which happened with the Annual Conference and Meeting in Philadelphia), the host institution has responsibility for obtaining another site.

If a coalition of institutions are involved as joint sponsors for the Annual Conference and Meeting, there is still only one of them named as fiscal agent. This is then the institution responsible for the contract with the hotel.

1. Hotel Arrangements. It is then the responsibility of the host institution to sign the contract with the hotel. Among the most important negotiated items with the hotel are the room rate and other charges (including space rental, meal rates, etc.).

Hotels will generally not guarantee a room rate much more than a year prior to an event. ACHE has generally requested one single rate for single and double rooms. The rate will depend on other opportunities for the hotel to sell the rooms (e.g., hotel rates in Indianapolis in May are often for a three-day minimum at high rates), on the number of rooms booked, and on other factors such as the meals to be included and so on. It is obviously important to negotiate as favorable a rate as possible in order that as many actual and potential members as possible may attend the Annual Conference and Meeting.

Accepted practice in the hotel industry is generally one complimentary room for every fifty room nights booked in the hotel. It has been practice to provide both the President and the Executive Vice-President with suites used for ACHE business during the Annual Conference and Meeting. Suites are charged in multiples of comps, one night often "costing" three comps.

2. Meeting Spaces. While hotels are in the business of charging for their meeting space, the volume of room bookings and meal functions for ACHE has generally precluded any charges for meeting or exhibition space. (See Appendices for sample meeting Accommodations.)

The configurations and availability of meeting space varies greatly in hotels. The Local Arrangements Committee must make certain that the Program Committee has accurate information on the meeting spaces in the facility.

Meeting rooms are configured in the following three ways:

- 1) Theater style. Rows of chairs facing a head table with a podium for the speaker or other arrangements for the program.
- 2) Classroom style. Tables and chairs facing a head table with a podium for the speaker or other arrangements for the program.
- 3) Conference style. Tables and chairs in a "U" or "O" shape for "conference-style" sessions.

ACHE has had positive feedback from use of the classroom configuration so much as possible (except, of course, for concurrent workshop sessions where those responsible for the program have designated other preferred arrangements, such as conference style).

In configuring the available space for the sessions, it is important that the hotel have adequate "turn-around" time between different functions. It is not possible, for example, for a luncheon to follow a general session set up theater style in the same room without two or so hours for "tear-down" and "set-up." Note that recent practice has reinforced the importance of good signage for meeting rooms, a Local Arrangements Committee responsibility.

3. Audio-visual Support. It is the responsibility of the Program Committee to learn of audiovisual requirements for the program and other events at the Annual Conference and Meeting. The Local Arrangements Committee then has responsibility for the delivery and maintenance of the equipment during the Annual Conference and Meeting.

Past practice has included both arrangements whereby local institutions provide equipment and a person or persons to maintain the equipment and ensure its security and whereby the hotel or its agent provides the equipment. ACHE has had successful experience with both arrangements.

4. Meals/Other Functions. The ACHE Board has provided the following guidelines for meals and meal functions for the Annual Conference and Meeting:
  - a) The Local Arrangements Committee shall make arrangements for all scheduled meals.
  - b) Unless changed by the Board of Directors, the scheduled meals shall include:
    - 1) opening reception;
    - 2) one luncheon;
    - 3) banquet;
    - 4) social hour preceding the banquet.
  - c) The Local Arrangements Committee shall select the menus for the scheduled meals. This should be done at the same time as the contract thus guaranteeing the price. The committee shall be responsible for guaranteeing a minimum number attending just prior to the meal.
  - d) Other meal functions, e.g., Board of Directors, Past President's luncheon, Alpha

Sigma Lambda, shall be responsible for communicating to the Local Arrangements Committee their needs, so the committee can make the proper arrangements. **These are not covered in the conference budget and are on a "cash" basis.**

- e) Any scheduled beverage breaks shall be the responsibility of the Local Arrangements Committee for arrangement and budget.

ACHE relies on the Local Arrangements Committee to select appropriate menus and to make other meal arrangements. Note that it is appropriate to provide provision for those requiring special diets. Note also that favorable comments have been received in recent years for "light" lunches (e.g., salad plates, chicken entrees, and so on). The banquet, on the other hand, has been well received as a "big" meal. This may also be arranged in conjunction with MSP and their conference planning work.

### **C. Budget/Fiscal Management/Reporting**

Recognizing that the "hosting" function accrues direct and indirect costs to the host institution, ACHE pays the host institution an "administrative/management" fee of 7.5% of the gross income for the annual conference and meeting. This arrangement will be confirmed by a contract between ACHE and the host institution.

The purpose of the annual conference and meeting is to provide a program of interest and stimulation to the membership. However, if approved activities should produce a deficit, it shall be paid from the treasury of the Association and if there is a surplus, it shall accrue to the Association. **Note that the Budget of the Association includes a specified net return from the Annual Conference and Meeting. The amount of this return to the Association is treated as a line item expense in the Board-approved meeting budget. The meeting "surplus" is thus calculated after all expenses are addressed, including the budget return to ACHE.** The Board has established the following guidelines:

1. The Local Arrangements Committee shall recommend the registration fees (and meeting budget) to the Board of Directors. The budget—and the fee—are then set by the Board. The non-member registration fee is higher than the member amount by the amount of professional member dues for one year. This sum is reported separately and treated as dues.
2. The Annual Conference and Meeting Budget shall include a return to ACHE amounting to 10% of the gross revenue.
3. The Local Arrangements Committee shall collect all fees in connection with the annual conference and meeting and be responsible for their safe keeping.
4. The Local Arrangements Committee shall disburse funds by recognized fiscal procedure.
5. The Board of Directors recommends that the person responsible for the collection and reimbursement of funds be bonded.
6. In order to provide an operating fund, it is recommended that early registrations (July, August or September) be solicited from the Board, Program and Local Arrangements Committees.
7. **The Local Arrangements Committee shall submit a financial statement to the Board of Directors within 90 days following the conclusion of the annual**

**conference and meeting, listing all income and expenditures under major categories and budget items.**

8. The Local Arrangements Committee shall work closely with the President-Elect and shall have the President-Elect's approval to exceed the approved budget expenditures categories.
9. The Local Arrangements Committee shall follow this refund schedule:
  - a) Full refund if request is received three days prior to Sunday of the Annual Conference and Meeting.
  - b) 80% after a) and until Sunday of the Annual Conference and Meeting.
  - c) No refund after Sunday of the Annual Conference and Meeting.
10. The Local Arrangements Committee shall issue receipts for registration indicating amount, and the receipt shall be signed.

Note that both the approved budgets and the final financial reports of the past two Annual Conference and Meetings are included in an appendix to this notebook.

**D. Guests Events**

The Local Arrangements Committee is responsible for developing and conducting a program for guests, for which a guest fee is charged. Guests also pay for meals and special events (e.g., tours, transportation, etc.) as necessary and as indicated on the registration form. Specific guidelines by the Board are the following:

1. A separate registration fee may be charged for participants in a guest program.
2. Guests wishing to attend any of the planned meals should have the opportunity of purchasing tickets.
3. The Local Arrangements Committee may plan for tours during or after the Annual Conference and Meeting. These may be included in the registration fee or may be charged separately.

**E. On-site Management**

The Local Arrangements Committee is responsible for the on-site management of the Annual Conference and Meeting. Guidelines from the Board include the following:

1. The Local Arrangements Committee shall provide for registration which will include handling finances, forms, and other necessary materials and personnel.
2. The Local Arrangements Committee shall arrange for location of registration desk in any easily accessible area.
3. The Local Arrangements Committee shall prepare a name badge for each registrant. Note that ribbons and color coding or other means should be used to identify speakers, officers, directors and "first-timers."
4. The Local Arrangements Committee shall make arrangements for adequate headquarters.

5. Packets and hand out materials are prepared and distributed by the Local Arrangements Committee.
6. **No partial registrations are to be accepted.**
7. Upon request of the Program Committee and approval of the President, complimentary registration may be given to external speakers who appear on the program.
8. Roster of attendance at the Annual Conference and Meeting shall be provided by noon of the third day of the meeting.
9. Minimally, the registration and information desk shall be open on Saturday from 1:00 to 9:00pm, Sunday from 8:00 am to 7:00 p.m. - other days from 8:00 a.m. to 5:30 p.m.

"After-action" report summarizing experience with Local Arrangements that year and offering recommendations for the future.

Many of these functions will be assumed under contract with MSP beginning in 2010.

#### **F. Other Guidelines**

The Board has established the following additional guidelines for the Local Arrangements Committee, acting in concert with the Program Committee as appropriate:

1. The Chairperson of the Local Arrangements Committee and the Chairperson of the Program Committee shall each serve as an ex-officio member of the other committee.
2. The Local Arrangements Committee shall assign meeting space based on the program developed by the Program Committee.
3. The Local Arrangements Committee shall within reason provide meeting space and media materials (audio-visual equipment) as needed by the Program Committee as arranged well in advance of the program.
4. The Local Arrangements Committee shall provide tickets for functions requiring the need for tickets.
5. The Local Arrangements Committee shall be responsible for information releases about the Annual Conference and Meeting.
6. The Local Arrangements Committee shall arrange for the seating at the head tables in collaboration with the Program Committee and the President, often coordinated by the home office.
7. The Local Arrangements Committee shall invite appropriate heads of local

institutions of higher education.

8. The Local Arrangements Committee is responsible for design and dissemination of the annual conference and meeting program documents and any ancillary promotional material. To enable the Local Arrangements Committee to do this in a timely manner, the Program Committee must complete its work by June 15.

The Local Arrangements Committee should set up its annual conference and meeting appropriate website at least one year prior to the meeting. It also must link to the ACHE website.

9. The immediate past Local Arrangements Chairperson will be named a member of the current Local Arrangements Committee.
10. Within 90 days following the Annual Conference and Meeting, the Local Arrangements Committee shall furnish to the incoming Chairperson and the Executive Vice-President a completed copy of the Local Arrangements Committee questionnaire.

## **G. Exhibitors**

Exhibitors have the potential of providing attendees with valuable information and contacts often not otherwise available at the sessions. Exhibitors providing services to ACHE members include training consultants, software firms, distance learning providers, resorts and other facilities, journals, publishers, and so on.

Exhibitor fees have the potential for offsetting rising Annual Conference and Meeting costs. While the hotel may charge a standard rate for draped tables used for exhibits, the Association fee should be significantly higher than cost (See Appendices for samples).

While a charge for exhibit space should be established, it may also be appropriate to "trade" space. Other organizations, for example, may find it worthwhile to have an exhibit at the ACHE Annual Conference and Meeting and to provide in-kind space at their conventions. The Executive Vice President's guidance should be sought with such possibilities.

The host/site for the next annual conference and meeting shall be provided with a complimentary exhibit space.

The location and "viewing time" for exhibitors are critical to successful vendor relationships and should be held in a well-trafficked and high visibility area.

Exhibitors shall be registered, given name tags and ribbons and be given packets. Other benefits will be determined by their level of sponsorship/exhibitorship.

## **H. Sponsors**

Sponsors for events at the Annual Conference and Meeting are important for ACHE and

for the sponsors. Local institutions and ACHE Regions, for example, may find it appropriate to show their commitment to the Association and to the Annual Conference and Meeting by sponsoring coffee breaks or other hospitality events during the Annual Conference and Meeting. Sometimes, exhibitors are interested in showing their hospitality and hosting an event. The MLE program of Harvard University has often sponsored receptions for "Alumni/alumnae" attending the Annual Conference and Meeting. Recent years have seen a significant increase in the number of sponsors who visit ACHE annual conferences and meetings. And, obviously, the Annual Conference and Meeting budget benefits greatly by having such sponsors.

## **I. Amenities**

While the success of the Annual Conference and Meeting is not a function of amenities, the Local Arrangements Committee generally pays special attention to amenities. For example, the host institution or other local institutions might arrange for fruit baskets for special guests at the Annual Conference and Meeting. VIP transportation should be arranged for special guests. Attendees might find printed guides to eating out or shopping helpful during their visits. The availability of a wide range of printed materials, including maps on the city and the surrounding area will be appreciated. Many program participants will appreciate the chance to visit the host institution's campus, including the bookstore. "Rolling out the red carpet" is appropriate for ACHE visitors. They'll probably be in town only once during your professional career; make them remember the host city and institution. In 2009, while MSP will be contracted to handle many local arrangements, the Program Committee and Local Arrangements Committee will continue to play an important role in "hospitality." The evaluations may be done on paper or online.

## **J. Evaluation**

The primary "after-the-event" document produced by the Local Arrangements Committee is the final financial report. This report, prepared in comparison with the approved budget, is an important document. Equally important, perhaps, in ensuring future success, is the narrative prepared each year by the Chair of the Local Arrangements Committee. While the evaluation of the program is the responsibility of the Program Committee, the Chair of the Local Arrangements Committee is also responsible for preparing an after action report. The report should include a complete roster, with addresses, of all those in attendance and, a separate listing of non member registrants.

## **K. Marketing/Publications**

The Local Arrangements Committee, working with the Program Committee, has the major marketing responsibility for the Annual Conference and Meeting. Shaping the content of the program is, itself, a major marketing task as the committee attempts to put an event together which it believes will attract the target audience.

As this is being written, the marketing emphasis is shifting from print and direct-mail media to web-based, online media. While many members prefer receiving printed program documents, others prefer online access.

It is the responsibility of the President-Elect and Local Arrangements Chair to arrive at the best promotional mix.

If the Local Arrangements Chair uses direct mail promotions, the Home Office will provide membership labels and/or mailing lists.

The plan for marketing and promotion must include:

1. Preparing and disseminating the "Call for Proposals."
2. Preparing a Conference Announcement—"Mark Your Calendar" announcement (the "broadside").
3. Preparing and posting the Official Program of the Annual Conference and Meeting—the promotional booklet.
4. Placement of advertisements in the Chronicle of Higher Education and publications is handled by the Home Office.
5. Preparing sequential announcements for "5 Minutes."
6. Preparing copy for linking to ACHE homepage.

The timing of the releases is discussed elsewhere. Preparing the Official Conference Program is by far the most complex and time consuming of these tasks.

An effort should be made to have all promotional material concerning the Program of the annual conference and meeting carry the same graphic identity or "signature". The purpose of this effort is to breed recognition among clients for messages concerning the annual conference and meeting.

In order to fully implement the use of common graphics on all promotional materials, a decision on the graphic image to be used will have to be made quickly following the determination of the theme, if possible.

In the past, ACHE purchased an advertisement (charged to the annual conference and meeting budget) in the Chronicle of Higher Education to promote the Annual Conference and Meeting. However, lost issues have encouraged ACHE to consider other electronic means for promoting the conference.

The official program document for the Annual Conference and Meeting reflects a level of sophistication which reflects positively upon ACHE. A review of recent examples will, once again, provide better direction than words can convey. There are, however, a few points concerning this piece which deserve emphasis.

1. Registration forms for both the Annual Conference and Meeting and for hotel reservations are embedded into the program document. Care should be taken to assure that as registrants remove either or both documents, that other significant information in the booklet is not removed as well. If online, registrants must be able to download the form easily. Further, it should be clear in the instructions that registrants are to send hotel reservation forms to the hotel (and not to the host

institution), and that meeting registration forms go to the host (and not to the hotel).

2. A "program at a glance" feature should be built into the document. This feature provides the reader with an instant overview of what is going on at what time on each day of the meeting.
3. Care should be taken to provide adequate description of session content so that participants can make intelligent choices about which sessions they will attend.
4. If events are not intended for all participants at the meeting, this fact should be so noted in the document.
5. Be sure to include clear instructions about how to reach the meeting hotel via the major arteries, and information about the schedule and cost of airport limos or alternate forms of transportation from the airport to the hotel.
6. Don't forget to list the names of the persons who make up both the Program Committee and the Local Arrangements Committee for the meeting.

It is also customary for the Local Arrangements Committee to make, as the prior annual conference and meeting, a ten to fifteen minute "promo" presentation on the next annual conference and meeting. This is done during the business session and often includes a promotional video or skit.

Members of the Local Arrangements Committee, along with members of the Program Committee, should be sensitive to other avenues through which the Annual Conference and Meeting of the Association may be promoted. To this end, a press release or copies of the conference announcement could be mailed to state associations, professional journals and any other outlets which might reach individuals with potential interest in the meeting and its program.

## **V. HOME OFFICE**

The Program Committee and the Local Arrangements Committee, subject to the approval of the Board of Directors, plans, conducts, and evaluates the Annual Conference and Meeting.

At the Annual Conference and Meeting, however, much business of ACHE is conducted. While officers and committee personnel manage much of this process, it is the Home Office, under the leadership of the Executive Vice President, which "tracks" and ensures the successful completion of ACHE business.

Appendix F provides a listing of tasks coordinated by or through the Home Office.

## **APPENDICES**

- A) Program Committee Calendar**
  - Guidelines: Day Chairs**
  - Presiders**
  - Speaker Information**
  - Small Group Activities**
  - Survey**
  - Evaluation Form**
  - Sample Speaker/Keynote Letters**
  - Speaker/Keynote Travel Forms**
  - Proceedings Information**
  - Suggestions for Speakers/Presenters**
  - Sample Letter - Presiders**
  
- B) Exhibitor/Sponsor Information**
  
- C) Local Arrangements Committee Reports**
  
- D) Budgets and Financial Reports**
  
- E) Hotel Contract**
  
- F) Home Office**

## APPENDIX A

### PROGRAM COMMITTEE CALENDAR AND TIMELINE

Target Dates	Item
<b>May</b>	Determine Annual Conference and Meeting Theme (completed).
<b>June-July</b> (completed).	Form Annual Conference and Meeting Program Committee
<b>August—December</b>	Identify keynote speakers (in-process).
<b>October 30</b> – <b>November 3</b>	ACHE Annual Conference and Meeting
a) Distribute	“Call for Proposals” at Annual Conference and Meeting.
b) Distribute	“Presider/Recorder Volunteer Form” at Annual Conference and Meeting.
c) Distribute	Date Saver Cards at Annual Conference and Meeting.
<b>November</b>	
a) Email	“Call for Proposals”
b) Advertise	“Call for Proposals, Five Minutes with ACHE newsletters, and other organizations with Continuing Education focus.
<b>November — March</b>	
a) Finalize Keynote Speakers.	
b) Recruit Presiders. (Day Chairs)	
<b>February</b>	Program Committee Meeting
<b>March — April</b>	
a) Letters mailed via electronic mail with return receipt:	
1) Confirmation letters to Keynote Speakers requesting return of bio, travel, and equipment information (Program Chair sends with copies to Day Chairs and Local Arrangements).	
2) Confirmation letters to Concurrent, Workshop, and Roundtable session presenters (Call for Proposals Chair sends with copies to Program Chairs, Day Chairs, and Local Arrangements Chairs) advising of upcoming contact with appropriate Day Chair.	
3) Confirmation letters to Session Presiders (Appropriate Day Chairs sends these).	
b) Other Correspondence:	
1) Letters to rejected proposals (sent by Call for Proposals Chair, offering roundtable or poster sessions as an alternative)	

- 2) Letters to Committee, Network and Region Chairs (sent by Liaison to Committee/Network and Region Chairs).

**April 15**

- a) Day Chairs confirm all arrangements with Keynote, Concurrent, Workshop, and Roundtable session presenters for the appropriate day; including getting presentation descriptions, bios, a/v requirements, room set-up, etc. (Day Chairs send confirmation notices to Local Arrangements Chair and the Program Chair).
- b) Day Chairs confirm Presiders assigned to all sessions on the appropriate day (also sends confirmation notices to Local Arrangement Chair and the Program Chair).
- c) Liaison to Committees/Networks and Region Chairs confirms all meeting arrangements/information needed (also sends confirmation notices to appropriate Day Chair and the Local Arrangements Committee Chair).
- d) Day Chairs prepare and submit Annual Conference and Meeting program copy for the appropriate day to Local Arrangements Chair and the Program Chair).
- e) Day Chairs prepare and submit Annual Conference and Meeting program copy for the appropriate day to Local Arrangements Chair and the Program Chair).
- f) Annual Conference and Meeting Program report due to the Board.

**April or May**

- a) Board meeting

**May 1** Annual Conference and Meeting Program Brochure copy due to Local Arrangements chair and JCHE editor.

**May 15**

- a) Annual Conference and Meeting Program report due to the Board
- b) First draft of the ACHE Program Booklet due to the Program Planning Committee.
- c) Mail Date-Saver Card to selected mailing lists (Local Arrangements Committee).

**May 15 — July 1**

- a) Proofread and finalize draft copy of Annual Conference and Meeting Brochure (Program Chair with assistance of Day Chairs).

**July 15**

- a) Mail out Annual conference and meeting Program Booklet (Local Arrangements Committee); send copy to editor of JCHE; post on web site.

**July 15, — August 15**

Program Chair sends Annual Conference and Meeting Brochure and cover

letter to:

- a) Keynote Speakers
- b) Concurrent, Workshop, and Roundtable Session Presenters
- c) Members of Program Planning Committee
- d) Committee/Network, and Region Chairs

**September 15**

- a) Evaluation Committee (Chair) prepares all evaluation instruments
- b) E-mail Marketing Date Saver (Local Arrangements Committee)

**October 1**

- a) Evaluation Chair duplicates evaluation forms and prepares evaluation “packets” for all Presiders/Recorders use on-site at the Annual Conference and Meeting.

**October Annual Conference and Meeting**

Final Program Planning Committee meeting

## **Guidelines for Program Day Chairs**

Program Day Chairs have the responsibility of overseeing a day of the conference.

Communication via correspondence and email is critical to the success of the conference.

The Program Committee Chair will send a letter of congratulations/acceptance to those whose proposals were accepted for session presentations and workshops and copy the Day Chair and the Chair of the Local Arrangements Committee.

### **Program Day Chair**

You will work with the person who made contact with the general session speaker/keynote for your day to make arrangements.

Everyone should be clear on who is making travel arrangements, including room accommodations, (see Budgeting/Fiscal Policies and Procedures for Program Committee).

The Presenter will also receive from the Program Committee Chair, a Speaker/Presenter Confirmation letter. The Program Committee Chair will indicate in the letter that the Day Chair will contact the speaker regarding additional AV needs and schedule verification information.

Day Chairs prepare and submit program copy for their day to the Local Arrangements Committee.

Day Chairs will be responsible for appointing and confirming, (in writing), presidors for all sessions, including general sessions on the appropriate day.

Day Chairs will ensure presidors are present at the Annual Conference and Meeting and have picked up their packets. If an individual does not attend the Annual Conference and Meeting, then the Day Chair will locate a suitable presidor replacement.

### **Instructions for Session Presiders**

Persons serving as workshop and concurrent session presidors perform an important function in the meeting. It is your job to see that speakers are present and ready to go and to keep the meeting moving along by observing starting and ending times. The following guidelines are offered to help you meet these important obligations.

- Session Presiders pick up Presider packets at the registration desk. Confirm that your packet contains a presidor direction sheet and session evaluation forms.
- Place evaluation slips on each chair in the meeting room.
- Arrive early at the session for which you are presidoring to assure that the speaker(s) or other resource persons are present.

- Verify that room arrangements and audio-visual support equipment are in place and that all equipment is in working order.
- Start the session on time and introduce the speaker and title and formally welcome the speaker(s).
- Assist the speaker with the distribution of handout materials.
- Watch the elapsed time for the session and alert the speaker/presenter if he/she seems unaware of the advance of time and allow time for questions/answers/discussion.
- Conclude the session on time. Please thank the speakers/presenters. Also, thank the participants for attending, remind them to complete and turn in the session evaluation form to you.
- Offer direction to participants about what is next on the program.
- Collect and count the completed evaluation forms, picking up any blank forms left behind. Write the number of attendees/completed forms on the front of the packet envelope. For example, if 15 people attended a session and 10 evaluation forms were returned, you would write "15/10" on the outside of the envelope.
- Place all evaluations, completed and blank, in to the packet envelope.
- Return the envelope to the registration desk by the end of the day.

**Questions? Please contact your Day Chair.**

## Speaker Information

1. When approaching possible speakers, provide each speaker with a brief written narrative about ACHE and its purposes. An offer can be made for expenses only or for an honorarium and expenses. If expenses are to be paid, it should be made clear in writing to the parties involved what is included. The sponsoring institution is responsible for paying all bills associated with the program at the Annual Conference and Meeting.
2. It is suggested that an offer to an individual being asked to speak be issued a formal written letter of invitation to confirm:
  - day, date, time and location of the presentation.
  - title and/or content of the speech/presentation.
  - amount of honorarium offered.
  - nature and amount of expenses for which reimbursement will be provided.
  - other expectations of the speaker.
  - arrival time and travel for the speaker.
  - whether the speaker needs a room reservation.

Secure a Social Security number (necessary later for paying speaker).

(NOTE: Local Arrangements Committee Chair must be copied on all confirmations with speakers.)

3. The Program Committee chairs sends two copies of the invitation letter to the speaker with a self-addressed postage paid envelope. If done electronically, request a read receipt. Ask that he/she please sign and return one copy to the Program Committee Chair; may be done via fax. Program Committee Chair is responsible for informing each speaker on how to get reimbursed for expenses. Checks for honoraria are available at the meeting and given to speakers at the conclusion of their part of the program. Speakers will need to complete appropriate paperwork for reimbursement.
4. Program Committee Chair invites keynote speakers to participate in meal functions proximate to their presentations. They are given speaker badges that entitle them to participate in any of the non-meal functions as they might choose. The cost of these meals is absorbed as a conference expense and is not counted against the Program committee speaker expense budget. The Local Arrangements Committee Chair must be informed of all such meals.
5. Hotel rooms and airline tickets for speakers can sometimes be arranged as complimentary. Most conference hotels and designated airlines will give ACHE a number of complimentary rooms/tickets. The Local Arrangement Committee Chair handles these and can inform the Program Committee chair if such complimentary rooms/tickets are available.

## **Background and Briefing Paper for Speakers/Presenters**

This background and briefing paper has been prepared to provide you with information that will create a general awareness of the Association for Continuing Higher Education (ACHE) and of its membership. Hopefully, this will give you an opportunity to know more about the audience you will be addressing.

ACHE is an international organization that has been in existence for longer than one-half century. The membership is composed of professional continuing educators from colleges and universities throughout the United States and Canada. The members have diverse job responsibilities including marketing specialists, curriculum experts, off-campus course or center coordinators, deans of extension or schools of continuing education, adult student counselors/advisors, financial managers and conference planners. The principal focus of the efforts of such persons is service to an adult or non-traditional student market in campus settings, off-campus extension locations, or on the sites of business, governmental and community organizations. Many continuing educators are interested in the use of telecommunications and other forms of technology as these concepts might relate to the delivery of service to adult learners.

There are three types of ACHE memberships available to educators. Institutional membership is for persons who are employed by institutions which are members of ACHE. Professional membership is for individuals who wish to hold personal membership in the organization. Affiliate membership has been established for proprietary institutions or other organizations which are involved in higher education. The current membership of the Association for Continuing Higher Education is approximately 1,500. A national meeting is held in the fall of each year dealing with concerns of professional educators. These meetings are held at various locations throughout the United States and Canada and are hosted by colleges or universities within the area of the conference. Regional organizations are also a significant part of the association. Presently, there are 8 regions which are set up by a geographical division of the U.S. and Canada. The regional organizations have a slate of officers and host meetings in the spring of each year at locations within the respective regions.

The governing body of the Association for Continuing Higher Education is a board of directors. The directors are elected for a three-year term. Committees are also an important part of ACHE. Constitutional committees, standing committees and ad hoc committees are established to carry on the program of the Association for Continuing Higher Education.

Each month a newsletter is published by ACHE that deals with issues, trends and problems in the field, with reviews of literature about continuing education, with professional conference or meeting dates, and with job opportunities in the field. On a quarterly basis, the association also publishes the *Journal of Continuing Higher Education*, which features scholarly and technical articles, and other information of interest to continuing education professionals.

Among the most important benefits of membership in ACHE are the professional

friendships and communication networks which develop among those who make up the Association. Members of this organization feel free to contact colleagues for advice and ideas. There is among this group an open willingness to share information with and provide help to professional colleagues.

### **Small Group Activities**

1. The bulk of the ACHE program each year consists of small group activities: workshops, lectures, panels, demonstrations, and similar activities.
2. It is important to provide several alternatives, but not so many that only a small audience will attend each session.
3. Careful attention in matching concurrent sessions to appropriate spaces in the meeting facility is required. It is critical that Program committee members know exactly the number, type, and capacity of all rooms that will be available to them for the program that they are to design.
4. Small group sessions should be selected or designed to optimize interaction of the participants and the presenter.
5. Handouts are very helpful. Presenters should be made aware of this interest and informed that they are responsible for copies.

### **Program Evaluation**

Since most continuing educators make it a practice to evaluate programs they conduct in their own institutions, it should not be a surprise that ACHE is eager for its own program to be evaluated. Thus, program participants have been asked to complete evaluation sheets during the context of the meeting each year or online.

### **Other Program Considerations**

1. In developing the program of the Annual Conference and Meeting, the Program Committee should be sensitive to many traditions that have been built up in ACHE over the years.
2. One of the most important benefits of ACHE membership is the chance to meet and come to know their professional colleagues in the field. It is important that adequate time be built into the programs to allow informal interaction that promotes the development of these relationships.
3. Exhibits are the responsibility of the Local Arrangements Committee. However, members of the Program Committee can contribute to this facet of the program by suggesting and referring possible exhibitors.
4. Another important facet of the program is the family member/guest program. This program is arranged by the Local Arrangements Committee. The Program Committee must know the details concerning these events.

**ACHE 2006**

**Los Angeles**

**October 28 – 30, 2006**

*Thank you for attending the 2006 ACHE Annual Meeting. We hope the sessions were both informative and relevant. We have strived to develop programs that are beneficial to you. Please take a few minutes and help the program committee evaluate how well we have done.*

*We hope to see you in Roanoke in 2007*

**2006 Conference Evaluation**

1. How did you hear about our Annual Meeting?

- Brochure    ACHE Newsletter    Chronicle of HE    Previous Conference    Website
- Other (describe)

2. Including this year, how many ACHE Annual Meetings have you attended?

- 1    2    3    4-5    6-10    More than 10

3. How many years have you been working in the field of continuing education?

- 1    2-5    6-9    10-14    15-19    20-24    More than 25

4. What is your primary area of responsibility (please check only one)?

- Credit Programming    Non-credit Programming    Distance Education
- Faculty    Administration    Other \_\_\_\_\_

5. Which best describes your place of employment?

- Two-year college    Research University    Private Business
- Four-year baccalaureate    Distance Education    Other \_\_\_\_\_

6. Which best describes your institution?    Public    Private    Other \_\_\_\_\_

7. What estimate of expenses will you personally incur in attending this Annual Meeting?

- None    1-24%    25-49%    50-74%    75-99%    100%

8. Please identify the reasons why you chose to attend this Annual Meeting of ACHE

	Important			Not Important	
Develop/maintain network of colleagues	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Theme of the conference	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Keynote speakers	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Identifying emerging issues	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Present paper/session	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Location of the meeting	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Always attend	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1

Opportunity for skills development of staff  5  4  3  2  1  
 Other \_\_\_\_\_  5  4  3  2  1

9. Please evaluate all aspects of the annual meeting.

	Outstanding	Average	Needs Improvement		
Logistics	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Overall quality of the conference	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Organization of the conference	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Facilities	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Meals	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Directional signs	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Check-in/Registration	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Pre-conference publicity	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Conference Booklet	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Barbara White Wright Keynote Address	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Dr. Stanley Shugart Keynote Address	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
California Higher Education Leadership Panel	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Quality of Concurrent Sessions	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Length of Concurrent Sessions	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Annual ACHE Luncheon	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
Optional LA Tour (only if attended)	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1

10. How well did the Annual Meeting meet your expectations?

Very well  Adequate  Not so well

11. How did you rate the length of the Annual Meeting?

Just right  Too long  Too short

12. How did you like the Saturday starting date for the Annual Meeting?

I liked it  Move back to Sunday  Another day \_\_\_\_\_

13. Did you stay at the Sheraton Hotel?  Yes  No If yes, rate the facilities

Excellent  Average  Poor Comments \_\_\_\_\_

14. Did you visit the Annual Meeting website (ache2006.org)?  Yes  No If yes, how would you rate it?

Very helpful  Somewhat helpful  Not helpful at all

15. Do you plan to attend the 2007 Annual Meeting in Roanoke, Virginia?  Yes  No

16. Please give the Program Committee suggestions on how to make the Roanoke meeting better.

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## KEYNOTE SPEAKER EVALUATION FORM

Session Title:

Featured Speaker:

1. On a scale of 1 — 5, how would you rate this session for “delivered as advertised” (5 = I got what I expected from it; and 1 = I did NOT get what I expected from it.) Please circle below:

5      4      3      2      1

2. What will be the most important piece of information that you will take home with you as a result of attending this Keynote session?
3. What did you find to be the least helpful piece of information presented by the speaker?
4. Would you like to make any recommendations regarding our having these types of sessions and/or keynote speakers in the future?

## WORKSHOP AND CONCURRENT SESSION EVALUATION FORM

Session Title:

Presenter(s):

1. On a scale of 1 — 5, how would you rate this session for “delivered as advertised” (5 = I got what I expected from it; and 1 = I did NOT get what I expected from it.) Please circle below:

5      4      3      2      1

2. What did you like most about this session?
3. What did you like least about this session?
4. Would you like to make any recommendation for improving and/or changing this session if it is delivered in the future?

**Presider: Please give to presenter upon completion of the session**

## Sample Speaker/Keynote Letter

November, 2006

Keynote/Presenter  
Address

Dear \_\_\_\_\_:

The Association for Continuing Higher Education (ACHE) 69<sup>th</sup>'s Annual Conference and Meeting is being held in Roanoke, Virginia, at The Hotel Roanoke and Conference Center, October 27 through October 30, 2007. ACHE has a long history as an organization that values quality learning opportunities for adults. The theme of the 2007 Annual Conference and Meeting is: **Refining Our Mission: Continuing Education's Role in Engagement, Outreach, and Public Service.**

We are pleased that you will be our keynote speaker on DAY, DATE, TIME, (INSERT APPROPRIATE INFO). Members of the Program Committee are excited to have someone of your caliber and expertise join us. As (APPROPRIATE CONTACT PERSON) has indicated, the Association will provide (\_\_\_\_\_) to cover honorarium and travel expenses.

To ensure a timely planning process, please complete and return the enclosed forms.

1. Speaker Information Form
2. Equipment/Materials Request Form
3. Program Copy Form
4. Please complete travel forms and remember to me. I will forward the information to \_\_\_\_\_, Sunday Day Chair. You may contact \_\_\_\_\_ :

APPROPRIATE DAY CHAIR  
ADDRESS  
Phone/Fax/E-mail:

We want to publish your presentation in the ACHE Proceedings. Please find enclosed a letter explaining the presentations summary required.

On behalf of ACHE thank you for agreeing to be our keynote speaker. Please call me at (\_\_\_\_\_), or email me at \_\_\_\_\_ if you have any questions. I look forward to meeting you in Roanoke.

Sincerely,

Day Chair/Program Chair

Enclosures

Cc: Day Chair  
Editor  
President

**NOTE:** All presenters are expected to pay the conference registration fee. There will be no exceptions. There are no reduced fees for presenters or participants wishing to attend only part of the conference. Keynote presenters receive a complimentary registration.

## Keynote Speaker Travel Form

**69th Annual Conference - ACHE 2007**  
**Saturday, October 27 through Tuesday, October 30, 2007**  
**The Hotel Roanoke and Conference Center**

As soon as your travel arrangements are made, please complete and return this form to Roxanne Gonzales, Program Chair. Thank you.

Your Name: \_\_\_\_\_  
(First) (Last)

Session Title: \_\_\_\_\_

Session Day/Time: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Air Travel and Hotel Accommodation \_\_\_\_\_

Airline & Flight Number \_\_\_\_\_

Arrival Date & Time \_\_\_\_\_

Departure Date & Time \_\_\_\_\_

Will you stay at the conference hotel? (Don't forget to book your reservations early)

\_\_\_\_\_ Yes \_\_\_\_\_ No If no, Where will you stay? \_\_\_\_\_

Ground Transportation (please circle as appropriate) \_\_\_\_\_ Taxi \_\_\_\_\_ Car \_\_\_\_\_ Other

If driving, when do you expect to arrive in Roanoke? \_\_\_\_\_

Return form to:

**David Grebel**  
**Director, Extended Education**  
Texas Christian University  
TCU Box 297026  
Ft Worth, TX 76129  
Fax: (817)-257-7134  
Email: [d.grebel@tcu.edu](mailto:d.grebel@tcu.edu)

**Speaker's Equipment /Materials Request Form**  
**69th Annual Conference - ACHE 2007**  
**Saturday, October 27 through Tuesday, October 30, 2007**  
The Hotel Roanoke and Conference Center – Roanoke, Virginia

Please complete and return this form to David Waterman, Chair, Local Arrangements Committee. Thank you.

**Session Title and Date:**

**Equipment:** Please request only equipment you definitely need. The Conference is charged a fee to use all audiovisual equipment. We will be unable to accommodate any requests for equipment not included on this request form.

- Lectern and Microphone
- Overhead Projector and Screen
- 35 mm Slide Projector and Screen
- Easel, Flip Chart, and Markers
- LCD Projector and lap top
- Other, Please specify:

I will bring my own equipment. I will need the following hookups:

**Return form to:**

**David Waterman**  
Assistant Director  
Continuing & Professional Education  
Virginia Tech  
702 University City Blvd - 0272  
Blacksburg, VA 24061  
Phone: (540)-231-5486  
Email: [dmwater@vt.edu](mailto:dmwater@vt.edu)

Cc: David Grebel – Program Co-Chair  
Appropriate Day Chair

**Proceedings Program Copy**  
**69th Annual Conference - ACHE 2007**  
**Saturday, October 27 through Tuesday, October 30, 2007**  
The Hotel Roanoke and Conference Center – Roanoke, Virginia

Keynote Speaker/Presenter Information

*Please verify all information below or add any missing information. Be sure to include information for all presenters.*

Presenter Information

Name: Mr. \_\_\_\_ Ms. \_\_\_\_ Dr. \_\_\_\_

Affiliation: \_\_\_\_\_

Professional Title: \_\_\_\_\_ Telephone: Work \_\_\_\_\_ Home \_\_\_\_\_

Address:

Street City State Zip  
Name: Mr. \_\_\_\_ Ms. \_\_\_\_ Dr. \_\_\_\_

Affiliation: \_\_\_\_\_

Professional Title: \_\_\_\_\_ Telephone: Work \_\_\_\_\_ Home \_\_\_\_\_

Address:

Street City State Zip

\_\_\_\_ Please attach a resume or biographical abstract on each presenter for the moderator to use in the introductions.

\_\_\_\_ Program Information

Presentation Title as it should appear (Please make sure it is as descriptive and at the same time as succinct as possible. The Day Chair from the 2007 Program Committee may contact you regarding this):

Presentation Summary: (For Program Description, Please Do Not Exceed 70 words)

**Return by March 16, 2007** to: (type in appropriate Day Chair below)

Sample Letter from Editor



Trident Technical College  
PO Box 118067, CE-M  
Charleston, SC 29423-8067  
(800)-807-2243

Thank you for agreeing to participate in the ACHE Conference.

We want your presentation to be published in the ACHE 2007 Proceedings. In order to appear in the Proceedings, you must submit a 1 - 2 page summary of your presentation.

Send your summary as a Word Document attachment to  
Irene.Barrineau@TridentTech.edu

**Your summary must be received by October 18, 2007.**

If your presentation was combined with another, only one combined submission should be made for the Proceedings. I realize that preparing the summary is extra work for you, but it is very important for us to have a historical record of the Annual Conference. By appearing in the Proceedings, your presentation will be preserved and made available to the entire ACHE membership. Thank you for your cooperation.

Sincerely,

Irene Barrineau, Editor  
Proceedings

## SUGGESTIONS FOR SPEAKERS/PRESENTERS AT ACHE 2007 CONFERENCE

The Association for Continuing Higher Education (ACHE) has a long history as an organization that values quality learning opportunities for adults. In our annual conferences, which focus on themes relevant to continuing higher education, we are eager to model the established principles of adult education in our general and concurrent sessions. Our conference participants are individuals who work in a variety of continuing higher education settings and programs; some have extensive experience and some are very new to this field. They are also typical of all adult learners: they have diverse ethnic and cultural backgrounds, different learning styles, and other unique characteristics, including some who have disabilities/exceptionalities.

As a speaker/presenter at the 2007 ACHE Annual Conference and Meeting in Roanoke, we hope that you will consider such differences as you develop your presentation and, if possible, make resources available in alternative formats.

1. Handouts, which reinforce the information presented, are greatly appreciated. You will be responsible for having sufficient copies of handouts.
2. Overhead transparencies (power point) and other visual presentations are most helpful when they present clear, brief, and high quality materials that are easily seen throughout the room.
3. As appropriate to the particular presentation, participants value examples, case studies, and practical applications of the material presented.
4. It is important that the session description clearly match the actual session as to content, approach, and degree of participant involvement. For example, a session may be either too advanced or too basic for the level of experience of a participant.
5. In most sessions, the participants value some amount of involvement, with time allowed for questions and answers and for sharing of ideas and similar experiences by those attending.
6. If a session is to have "hands on" activities, that information should be clearly given in the description and the appropriate equipment arrangements made with the local arrangements committee.

We are pleased that you will be a part of the 2007 Annual Conference and Meeting and look forward to your presentation!

**NOTE:** All presenters are expected to pay the conference registration fee. There will be no exceptions. There are no reduced fees for presenters or participants wishing to attend only part of the conference. Keynote presenters receive a complimentary registration.

## Sample Letter to Presiders

To: Presiders

From: David Grebel  
Program Committee  
2007 ACHE Meeting

Date: June, 2007

Re: Program Confirmation

Thank you for agreeing to serve as a Presider, on \_\_\_\_\_, for the 69th Annual Conference and Meeting of ACHE, at Roanoke, Virginia, October 27 – 30, 2007. Please see attached program for specific times.

I am also enclosing the guideline for Presiders and a list of the Day Chairs. They are responsible for any changes or corrections to the program for the Annual Conference and Meeting.

Again, thank you for serving the Association in this important role. I look forward to seeing you in Newport.

Enclosure: Guidelines for Presiders

cc: Day Chairs

# Exhibitors and Sponsors

Enclosing previous samples, but this section needs to be revisited, revised and clarified! Here is a list of concerns:

1. Inaccurate exhibitor dates in program, on website, and letter to exhibitors.
2. Clarify exhibitor vs sponsor.
3. Clearly define benefits for each level. Exhibitors and Sponsors – do they have a link on the annual conference and meeting website? What about Program-at-a-Glance? What about their logos?
4. Educational Partnerships are a separate entity and automatically receive the benefits listed on the website. Remember that ACEWare has a banner to be displayed.
5. Improve communication among local arrangements chair, program committee chair, and home office.
6. Include a cancellation clause.



68th Annual Meeting  
SHERATON LOS ANGELES DOWNTOWN HOTEL  
711 SOUTH HOPE STREET  
LOS ANGELES, CA 90017  
October 27-30, 2006

**REGISTRATION FOR EXHIBIT SPACE**

Please complete, sign, and return this form along with exhibitor registration fee payable to **ACHE** to:  
Mary Kenny  
ACHE Exhibitor Committee/Local Arrangements  
Cal State San Marcos Extended Studies  
333 S. Twin Oaks Valley Road  
San Marcos, CA 92096-0001  
Phone: (760) 750-8703 Fax: (760) 750-3138 [mkenny@csusm.edu](mailto:mkenny@csusm.edu)

Attached are the various levels of sponsorship and the Exhibit Booth Specification Form. ACHE will assign exhibit space based on sponsorship level and the order in which the registrations, accompanied by fees, are received. This registration becomes a contract when signed and paid for by exhibitor and accepted by ACHE. Continue to check the conference Web site for notice that registrations are full. PLEASE PRINT OR TYPE (NOTE: Information for your listing in the Conference Program will be taken from this form, so accuracy and completeness are important.)

1. Business Information:

Firm Name \_\_\_\_\_ Phone ( ) \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Email \_\_\_\_\_

Name (print/type) \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

2. Company/organization name as it should appear on the standard booth sign to be furnished by ACHE as part of the rental fee.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Brief description of product or service:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. List names (print or type) of your two representatives for whom sponsor badges should be prepared.

Additional representatives may be added for \$200/person

1. \_\_\_\_\_ in charge of booth
2. \_\_\_\_\_
3. add'l \_\_\_\_\_
4. add'l \_\_\_\_\_

## **SPONSORSHIP LEVELS**

### **President Level - \$4,000**

Host for opening reception, closing banquet, Sunday annual luncheon, or one of three keynote speakers – includes banner at event, ad and virtual brochure on the conference Web site (with optional link to your business site), exhibitor space with electrical connection, special recognition at hosted event and at the opening session and business meeting, two conference registrations, two tickets to the annual luncheon and award banquets, first tier option to select your exhibit table location, roundtable participation on Monday morning, and inclusion in list of sponsors on “Program at a Glance”.

### **Dean Level - \$2,500**

Sponsor for “Program at a Glance” (pocket-size conference program provided to all participants), name tag lanyards, or conference gift – includes full-page ad on “Program at a Glance” or business name/information on lanyards, break sponsor, or tote bag – includes banner at event, ad and virtual brochure on the conference Web site (with optional link to your business site), exhibitor space with electrical connection, two conference registrations, two tickets to the annual luncheon and award banquets, second tier option to select your exhibit table location, roundtable participation on Monday morning, and inclusion in list of sponsors on “Program at a Glance”.

### **Director Level - \$1,000**

Includes assigned exhibitor space for two representatives with electrical connection, two tickets to the annual luncheon, and inclusion in list of sponsors on “Program at a Glance”.

**Visit our Conference Web site: <http://www.ache2006.org/>**

## EXHIBITORS SPECIFICATIONS FORM

Fee for all sponsorship levels will include:

Conference registration (varies by sponsorship level)  
Eight-foot table skirted and two chairs  
Wastebasket  
Sign to identify vendor and booth number  
Standard power connection electrical outlet with two plugs  
Carpeted floor

### Exhibitor Schedule

Saturday, October 28

Setup 9:00 am-Noon

Exhibits Open 12:30 pm-8:30 pm

Sunday, October 29

Exhibits Open 7:30 am-5:30 pm

Booth teardown 5:30 pm-8:30 pm

Monday, October 30

Exhibitor Roundtables 7:45 am-8:45 am

**(President and Dean levels only)**

### IMPORTANT CONDITIONS AND REGULATIONS

Additional information and guidelines will be provided upon completed registration

### ADDITIONAL SERVICES AND HOOK-UPS

If additional hook-ups or services are required, there may be an additional charge by the hotel conference center. Please contact the hotel directly for additional requirements.

SHERATON LOS ANGELES DOWNTOWN HOTEL  
711 SOUTH HOPE STREET  
LOS ANGELES, CA 90017  
T: (213) 488-3500  
F: (213) 488-4110

**SPONSORSHIP LEVELS**

President Level - \$4,000; four available \$ \_\_\_\_\_

Dean Level - \$2,500; six available \$ \_\_\_\_\_

Director Level - \$1,000 \$ \_\_\_\_\_

**Additional Registrations @ \$200.00 each** \$ \_\_\_\_\_

**Total Fees** \$ \_\_\_\_\_

**Enclosed is our fee for participation in the ACHE annual conference as an exhibitor. We wish to pay by:**

\_\_\_\_\_ Check (Make Payable to: **ACHE**) \_\_\_\_\_ Money Order \_\_\_\_\_ Purchase Order

**If paying by credit card, please supply the following information:**

\_\_\_\_\_ MasterCard \_\_\_\_\_ Visa

\_\_\_\_\_

CARD NUMBER

\_\_\_\_\_

EXPIRATION DATE

\_\_\_\_\_

NAME ON CARD

SIGNATURE

A duplicate of this registration will be returned to you after assignment of exhibit space.

<p><b>FOR ACHE USE ONLY</b> Exhibit Space Assigned _____  By _____ ACHE Representative Date _____</p>
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## **APPENDIX C**

### **LOCAL ARRANGEMENTS COMMITTEE GUIDELINES**

The Local Arrangements Committee is responsible for planning, conducting, and evaluating the logistical and other local arrangements for the Annual Conference and Meeting of the Association. The following constitutional guidelines provide the framework in which the Local Arrangements Committee completes its work:

1. The Local Arrangements Committee shall recommend the facility or facilities which will house the annual conference and meeting. The facilities must comply with ADA standards.
2. Upon approval of the facility or facilities, the Local Arrangements Committee shall reserve and complete all local arrangements for space in the facility or facilities.
3. Approximately one year prior to the annual conference and meeting, the Local Arrangements Committee shall sign an agreement with the facility in which the rates and space are guaranteed to the Association and the Association guarantees to hold the meeting in the facility.
4. The facility shall guarantee adequate space for general meetings and small meetings without cost to the Association.
5. The facility shall furnish without charge suites for the President and Executive Vice-President. If insufficient rooms are booked, ACHE shall pay for these suites. If the facility provides rooms on a lesser booking, the Board shall determine who shall occupy any excess complimentary rooms. (After Speakers rooms are covered.)
6. The Local Arrangements Committee shall furnish without cost to the Association a headquarters room. Hospitality rooms if deemed desirable shall also be furnished without cost to the Association.
7. In selecting accommodations for the annual conference and meeting, it is recommended that the location in regard to the hub of activity in the city be considered.
8. The facilities should be attractive with adequate rooms, medium rates, and convenient to parking for those who drive.
9. All liaison and arrangements for facilities shall be through the Local Arrangements Chairperson.
10. The Local Arrangements Committee shall meet at least once during the year.
11. A bulletin board for announcements and messages shall be maintained near the registration information desk.
12. The Local Arrangements Committee is not authorized to charge the annual conference and meeting budget for expenses incurred in committee travel to prior year(s) annual conference and meeting(s).

## LOCAL ARRANGEMENTS PLANNING CALENDAR

The following planning calendar outlines recommended critical path dates and activities regarding the hosting and program functions.

<u>Target Date</u>	<u>Activity</u>
5 years prior	Host institution's invitation accepted by Board. Local Arrangements Chair identified by host institution.
4 – 3 years prior	Tentative hotel selection.
2 years prior	Committee appointed by ACHE president-elect with advice and counsel of Local Arrangements Chair. Hotel identified/contract confirmed/room rate set.  At annual conference and meeting, meet with Local Arrangements Committee to outline promotion efforts needed for the next annual conference and meeting. Also, work with host city visitors/convention bureau or Chamber of Commerce for promotion ideas. Have artwork for promo completed when President-Elect announces theme/title.  Prepare detailed annual conference and meeting budget, including proposed registration fees, for approval by the ACHE Board at its midyear meeting. If possible, meet with the Board to present the budget and give an overview of the special events and local attractions. Note: The budget will require confirmation of the marketing plan for the annual conference and meeting, including the mix of print and online media.
1 year prior	Meet with Program Committee at annual conference and meeting to coordinate (Annual Conference and Meeting) activities and assignments for the next annual conference and meeting. Have promotion booth at annual conference and meeting and present overview of proposed conference at the business meeting.  Meet with Local Arrangements Committee to start committee work in earnest. Disseminate and/or post the Call for Papers and put request in <u>Chronicle</u> .  Initiate solicitation of exhibitors.
October–February	Start contracting: special events, such as entertainment, Sunday evening reception, Monday evening out-on-the-town event, etc.  Finalize all transportation contracts with airlines and rental cars.

Contact AAACE, UCEA, and other state associations within in meeting location to request their mail labels/lists.

February	Meet with the Program Committee to select main speakers and finalize concurrent sessions and program activities in coordination with Local Arrangements activities and projected budget line items.  Continue solicitation of exhibitors.
May	Prepare brief progress report for the Board's information at its midyear meeting.  Complete final copy of the annual conference and meeting program document.
June	First release of the program document, including registration and hotel/travel information.
July	Follow-up marketing activities.
August	Follow-up marketing activities.  Confirm AV needs.  Review hotel arrangements re menus, meeting rooms, and room bloc.  Review arrangements for special and optional events. Review registration procedures and staffing.  Review signage and AV requests.
September	Follow-up marketing activities.  Finalize registration arrangements, conference packets, AV, head table and meeting room sets, etc.
October/November	Show Time!  Manage conference activities and events.
January-March	Fiscal closeout.  Send final report to home office.

## APPENDIX D

### ANNUAL CONFERENCE AND MEETING BUDGET FORMAT

1.	<u>Revenue</u>		
	A. Member registrants @ \$ _____		\$ _____
	*B. Non-member registrations* @ \$ _____		_____
	C. Guests @ \$ _____		_____
	D. Exhibits @ \$ _____		_____
	E. Sponsors @ \$ _____		_____
		Projected Revenue	\$ _____
2.	<u>Expenses</u>		
	A. Marketing and advertising		
	1. (#)Cards/broadsides(printed & mailed)		\$ _____
	2. (#)Program brochures		_____
	3. Media ads		_____
	4. Postage		_____
	5. Mailing lists		_____
		Mktg & Advertising Subtotal	\$ _____
	B. <u>Program</u>		
	1. Speaker honoraria, travel, lodging		\$ _____
	2. Audio-visual		_____
	3. Photocopying/duplication		_____
	4. Signs		_____
	5. Registration supplies/pkts/badges/ribbons		_____
	6. Telephone		_____
		Program Subtotal	\$ _____
	C. <u>Other</u>		
	1. Complimentary registrations		\$ _____
	2. Banquet decorations		_____
	3. Entertainment		_____
	4. Exhibit expenses		_____
	5. Non-member registration fees* (Professional Member rate)		_____
	6. Net return to ACHE		_____
		"Other" Subtotal	\$ _____
	D. <u>Food and Beverage</u>		
	1. Luncheon		\$ _____
	2. Breaks		_____
	3. Banquet		_____
	4. Reception		_____
		Food & Beverage Subtotal	\$ _____
	E. <u>Contingency</u>		\$ _____
		Total Expenses	\$ _____

\*Note: The non-member fee will be the member fee plus the amount of one year's professional member fee.

<p style="text-align: center;">           ACHE 2006 Annual Meeting            October 27 - November 2, 2006            Los Angeles, California / Sheraton Hotel            Budget Based on 215 total participants         </p>
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<b>Revenues</b>	<b><u>Budget</u></b>	<b><u>Final</u></b>
Registration	81,000	89,917
Exhibitors/Sponsors	14,500	23,500
Other (Optional Event-Bus Tour)	5,000	5,220
Hotel Bed Night Reimbursement	7,860	6,770
Total Revenues	<b>108,360</b>	<b>125,407</b>
<b>Expenses <u>Marketing</u></b>		
Website/Mgmt	3,538	3,280
Prog Bklt/Reg flyer (printing/postage)	6,848	4,876
Promos @Madison	1,259	1,259
<b><u>Program Committee</u></b>		
Speakers	6,000	6,245
AV	6,000	6,282
Program	14,500	11,184
Opening Event Facilities Rental	4,000	3,736
Opening Event Entertainment	2,355	875
credit card fees		2,034
<b><u>Food &amp; Catering</u></b>		
Meals/Breaks	52,000	45,923
Bus Tour		2,339
	<b>96,500</b>	<b>88,033</b>
<b><u>Other</u></b>		
Administrative Fee (7.5%)	8,127	6,270
Return to ACHE	3,733	ACHE/CSU SanMarcos/Cal Poly=\$3135 ea.
Total Expenses	<b>108,360</b>	<b>94,303</b>
Total Revenue	<b>108,360</b>	<b>125,407</b>
Return to ACHE		<b><u>31,104</u></b>

**Sample Budget**  
**ACHE Annual Conference and Meeting**  
**Example from Madison, Wisconsin**

Attached is the budget for the 2005 ACHE Annual Conference and Meeting, held October 29 - November 2, 2005 at the Monona Terrace Convention Center in Madison, Wisconsin. The budget contains modest increases in meeting fees over 2004 and reflects the challenges of bringing the meeting to Madison. The budget is based whenever possible on cost estimates received from actual vendors and in a few cases on historic data. The following primary assumptions were made in developing this budget:

- The Meeting will follow a schedule similar to that of the 2004 meeting, beginning with registration and some committee meetings on Saturday, October 29<sup>th</sup>. The meeting will open in full on Sunday the 30<sup>th</sup> and conclude with the awards banquet on Tuesday, November 1<sup>st</sup>. The Board of Directors will meet on Wednesday the 2<sup>nd</sup>.
- The meeting will be headquartered at the Monona Terrace Convention Center in Madison, Wisconsin.
- Pre-conference excursions and tours are not included in this budget and will be handled by local vendors.

**67th Annual Conference ACHE 2005 – Draft Budget  
 October 29 – November 2  
 Monona Terrace Convention Center -- Madison, Wisconsin  
 Roger Maclean, Local Arrangements Chair  
 Projected Number of Participants - 200**

Approved 2005 ACHE Budget (5/5/04)

PROJECTED REVENUE	<u>Budget</u>	
Early member registration 170 X \$345	\$58,650	
Early non-member 20 X \$405	8,100	
Late member registration 25X \$395	9,875	
Late nonmember registration 10 X \$455	4,550	
additional registrations 2 institutes 15 X \$300	4,500	
Guest registrations 15 X \$87 (\$30+\$20+\$37)	1,305	
Retired members 5 X \$60	300	
Registration Income		\$87,280
Exhibitors 10 X \$425	4,250	
Sponsorships 2 X \$5000	10,000	
<u>Other Income</u>		<u>\$14,250</u>
Total Income	\$101,530	

PROJECTED FIXED COSTS

MARKETING

Design costs	\$1,200
Call for papers-printing	1,500
Date Saver/post card	750
Program Brochure	6,500
Mailing Service	800
Mailing labels	500
Promotional materials/Newport	900
<u>Subtotal</u>	<u>\$12,150</u>

PROGRAM COMMITTEE

Speakers	\$7,000
A/V	10,500
Signage	500
Program Committee	1,500
Conference materials/registration services	5,000
Telephone/fax	500
Transportation	600
Facility rental (minus \$4000 for sliding scale)	10,000
Copying	400
Opening event – entertainment	2,000
Banquet programs	200
Website	500
Exhibitor setups	2,000
<u>Banquet gifts</u>	<u>600</u>

Subtotal \$41,300

FOOD AND BEVERAGES

Sunday

Program committee lunch (30 X \$20) \$600

Past Presidents lunch (15 X \$20) 300

Break (\$6 X 250) 1,500

Sunday reception (\$30/person) 8,100

Monday

Cont breakfast (\$7.50 X 230) 1,725

2 breaks (\$12 X 250) 3,000

lunch (200 X \$20) 4,000

Tuesday

Cont break (\$7.50 X 200) 1,500

break (\$6 X 200) 1,200

banquet dinner (175 X \$37) 6,475

Sub total \$28,400

Expense sub total \$81,850

OTHER

Administration fee (7.5 % of income) \$7,615

Contingency 1,500

Income net (10.4%) 10,565

Subtotal \$19,680

Total Program Costs \$101,530



Sunday	2:30 pm	3:45 pm	Meeting	Concurrent Sessions	Classroom	3
Sunday	11:00 am	1:00 pm	Exhibit Setup		Tabletop Ex 6'	2
Sunday	4:00 pm	5:30 pm	Meeting	Region 1	Classroom	3
Sunday	4:00 pm	5:30 pm	Meeting	Region 2	Classroom	2
Sunday	4:00 pm	5:30 pm	Meeting	Region 3	Classroom	2
Sunday	4:00 pm	5:30 pm	Meeting	Region 4	Classroom	3
Sunday	4:00 pm	5:30 pm	Meeting	Region 5	Classroom	3
Sunday	4:00 pm	5:30 pm	Meeting	Region 6	Classroom	3
Sunday	4:00 pm	5:30 pm	Meeting	Region 7	Classroom	7
Sunday	4:00 pm	5:30 pm	Meeting	Region 8	Classroom	3
Sunday	4:00 pm	5:30 pm	Meeting	Region 9	Classroom	1
Sunday	4:00 pm	5:30 pm	Meeting	Region 10	Classroom	1
Sunday	4:00 pm	5:30 pm	Meeting	Region 11	Classroom	1
*Sunday	6:30 pm	10:00 pm	Reception/Dinner		Rounds of 10	2
Monday	7:30 am	5:00 pm	Registration	Local Arrangements	Registration	2
Monday	7:30 am	5:00 pm	Continuous Break		Flow	2
Monday	7:30 am	5:00 pm	Exhibits		Tabletop Ex 6'	2
Monday	8:00 am	9:00 pm	Meeting	Accelerated Degree Prog. Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Community/2 Yr College Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Corporate Learning Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Instructional Tech & DL Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	ICHE Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Marketing Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Minority Affairs Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	OAL Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	PD Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Faculty Best Practices Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Institution Community Network	Hollow Square	3
Monday	8:00 am	9:00 pm	Meeting	Value-Add Network	Hollow Square	3
Monday	9:00 am	10:15 pm	General Session		Rounds of 10	2
Monday	10:45 am	11:45 pm	Meeting	Business Meeting	Classroom	2
Monday	12:00 am	1:45 pm	Lunch		Rounds of 10	3
Monday	2:00 pm	3:15 pm	Meeting	Concurrent Sessions	Classroom	3
	3:30 pm	4:45 pm				
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Monday	2:00 pm	4:45 pm	Meeting	Concurrent Sessions	Classroom	3
Tuesday	7:30 am	5:00 pm	Registration	Local Arrangements	Registration	2
Tuesday	8:45 am	10:00 am	General Session		Rounds of 10	2
Tuesday	9:00 am	4:00 pm	Exhibits		Tabletop Ex 6'	2
Tuesday	10:30 am	12:30 pm	Meeting	Workshops	Classroom	3
	2:00 pm	3:15 pm		Focus Sessions		
	3:30	4:30 pm		Concurrent Sessions		
Tuesday	10:45 am	4:30pm	Meeting	Workshops	Classroom	3
Tuesday	10:45 am	4:30 pm	Meeting	Workshops	Classroom	3
Tuesday	10:45 am	4:30 pm	Meeting	Workshops	Classroom	3
Tuesday	10:45 am	4:30 pm	Meeting	Workshops	Classroom	3
Tuesday	10:45 am	4:30 pm	Meeting	Workshops	Classroom	3

Tuesday	10:45 am	4:30 pm	Meeting	Workshops	Classroom	3
Tuesday	10:45 am	4:30 pm	Meeting	Workshops	Classroom	3
Tuesday	4:15 am	5:15 pm	Meeting	Program Committee	Classroom	3
Tuesday	4:00 pm	5:00 pm	Exhibits		Tabletop Ex 6'	2
Tuesday	6:30 pm	10:00 pm	Reception/Dinner		Rounds of 10	1
Wednesday	8:00 am	12:00 pm	Meeting	ACHE Board of Directors	Hollow Square	1

\*Dinner may be off property

## Brochure Guidelines

Remember to include:

- Cancellation clause\*
- Day rate, if appropriate
- ADA clause: The registration form should include a space whereby a disabled person can request the “reasonable accommodations” required by law.
- Include Committee/Network Meeting schedule
- Be careful of early registration dates and hotel deadlines, so they don’t conflict.
- Keynote presentations—include content, not only bio.
- Brochure should be proofed by the Home Office before going to press
- Registration forms include all pertinent information.
- ACHE logo should be properly used.
- See section “check all that apply”. List should include: Board Member, Past President, First-Timer, Presenter, Guest

\* This schedule is in the Guidelines but is not followed:

The Local Arrangements Committee shall follow this refund schedule:

- a) Full refund if request is received three days prior to Sunday of the Annual Conference and Meeting.
- b) 80% after a) and until Sunday of the Annual Conference and Meeting.
- c) No refund after Sunday of the Annual Conference and Meeting.

## APPENDIX E

### HOTEL CONTRACT

The ACHE President is responsible for securing host institutions and sites for future annual conference and meetings. Once the Board has accepted and approved the host institution's written invitation, liaison between the Association and the host institution passes to the Executive Vice President.

While the ACHE Board of Directors has not limited itself to a particular format or specifications for hotel arrangements associated with the Annual Conference and Meeting, this appendix provides general expectations for such arrangements as follows:

- 1) The hotel contract will be an agreement between the host institution and the hotel, subject to the approval of the ACHE Executive Vice President. ACHE guarantees against loss on the part of the host institution.
- 2) ACHE, given the number of room nights generated by the Annual Conference and Meeting, does not pay for any meeting space associated with the Annual Conference and Meeting. Subject to release by the Chair of Local Arrangements, the hotel should reserve all meeting space for ACHE use during the period of the Annual Conference and Meeting.
- 3) The hotel will receive room reservations directly from those attending the meeting and furnish ACHE with counts as requested.

## **APPENDIX F**

### **HOME OFFICE**

The Executive Vice President and the Home Office staff are partners in the success of the Annual Conference and Meeting. In general, the business of ACHE is the responsibility of the Home Office. Listed below are items attended to by the Home Office:

All agendas

Seating at head tables at luncheon and awards banquet

Coordination of awards: Booklets, awards, certificates, etc.

Arrangements for Board meetings

Arrangements for special meetings of Board, Past President's luncheon and regional leadership