

# Region & Wing Conference Planning Guide



CIVIL AIR PATROL

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# Introduction

## Foreword

This pamphlet discusses the process for putting on a region or wing conference; however, many of these processes and principles can be used when planning any type of large learning activity.

Planning a conference is a fascinating challenge. As the Conference Project officer (CPO) for the event, it will stretch you, but with the inevitable success comes an exhilarating feeling. It's that way because you and your team will have created an event that fires up your fellow members, sending them home with a fire inside to build an even better CAP in the year going forward.

Research has shown that CAP members come to our conferences to do three things:

- To connect
- To collaborate
- To celebrate

If your conference provides quality opportunities to do these three things, your success is virtually guaranteed.

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The Events Manager for Learning Management is the OPR for this document and welcomes your comments and recommendations to improve this pamphlet. The OPR can be reached using the contact information below:

NHQ CAP/LM (Learning Management)  
105 South Hansell St.  
Maxwell AFB, AL 36112  
Email: [conference@capnhq.gov](mailto:conference@capnhq.gov)

## Three Formats for Conferences

Three basic conference formats have evolved in the CAP conference community. The first, face-2-face (F2F) is the one that most CAP members know. It is the most common type of conference that members have experienced, and it is very effective and fun.

In recent years, technology advancements and the restrictions placed on conferences in the early 2020s due to Covid have led many regions and wings to explore virtual and hybrid conference formats. These formats have been around for years, albeit for larger corporations and government agencies. It's only been in the past few years that they have become viable for CAP as an option. Virtual and hybrid formats are becoming more attractive to CAP because of the flexibility they offer as well as the chance to touch more members. Let's discuss the pros and cons of each as you begin to think about how you would choose each format to suit your particular needs.

### Pros and Cons

#### The Face-2-Face Conference

It used to be that there was only one type of wing conference: a face-2-face (F2F) weekend conference which normally began in a Friday night with a reception or happy hour of some type and ended on Sunday with some people going home directly and others staying for a meeting such as a Commanders Call. This type of conference comes in a couple of different types: traditional with the AM assembly, breakouts in a variety of rooms throughout the day and a banquet. The other type is the Town Hall, a smaller affair where the assembly, in-line presenters for all and a dinner or banquet is all held in the same room.

F2F is the type of conference with which many of our members are most familiar. Going forward, many wings will continue to use this model as it fits their needs best. This pamphlet will spend quite a bit of time planning for this type of conference.

#### PROS OF THE F2F CONFERENCE

There are several good reasons to choose a F2F conference format:

- Face-2-face conferences bring people together in a friendly atmosphere. It provides multiple choices to connect with friends new and old.
- It allows choice between multiple activities and to enter and exit activities as one desires.
- It lets members seek out and speak to wing, region, even national staff about matters of interest.
- It does so in an environment that is purpose-built to focus one's attention on CAP.

Wing conferences immerse members into CAP's world where everyone, more or less, has the same goals. The temptations of work, a favorite streaming service, household chores or a ring of the doorbell are absent. It's just us.

## CONS OF THE F2F CONFERENCE FORMAT

F2F conferences have three basic downsides:

- They can be expensive to the member and to the wing. Not all our members can afford to go to a conference, They can also be expensive to the wing if minimums guaranteed to the hotel aren't met.
- Members may not have the time to go to the conference due to work, school, or family. Additionally, the wing begins to plan months in advance, taking time away from other projects.
- People who miss the conference can't take advantage of the content that is offered to the level an attendee can. While attendees share what they've learned, they can't share "the whole picture."

## The Virtual Conference

The virtual conference leverages technology to deliver the conference experience remotely to the participants. In this model, there is no "traditional" conference venue. Speakers, presenters, exhibitors, meetings, ceremonies; indeed, most all content is delivered via remote access.

## PROS OF THE VIRTUAL CONFERENCE FORMAT

The virtual conference format offers several advantages to other conference formats:

- This model is a flexible option for those who for a multitude of reasons are not able or who choose not to assemble in one place.
- It also provides the wing the chance to stretch out the conference experience over time, rather than compressing the activity into 36-48 hours straight-through a weekend.
- Depending on conference needs, activities and schedule, the platform (technology and method housing the conference content and access for members), it can be less costly than a full F2F conference venue.
- Finally, it allows for recording of events and presentations for later on-demand viewing from even more members who may not have had the time to "tune-in" live.

## CONS OF THE VIRTUAL CONFERENCE FORMAT

As with any choice, there are tradeoffs to be made with virtual conferences:

- Depending on the needs of the conference, using a virtual format might be more expensive.
- Some conference activities which may be important to the wing may not be doable using a virtual format, for instance, STEM activities, drill competitions, some demonstrations, etc.
- The technology may “hiccup” (loss of bandwidth, audio video problems, attendee-user issues from lack of familiarity with the platform or their own tech tools), etc.
- Attendees who crave an in person, spontaneous experience may tune out if not engaged.
- Members with sight or hearing disabilities may have trouble engaging with the content depending on the conference budget and platform chosen.
- The wing must still devote months to planning the content to make it engaging for the members.

## The Hybrid Conference

The hybrid conference combines the F2F experience that a lot of members enjoy with the added feature of allowing more members (and even speakers) to participate remotely. It also allows for later “on-demand” viewing of highlighted events.

### PROS OF THE HYBRID CONFERENCE FORMAT

The hybrid format can solve some problems for the planner because it can combine much of the best from both the F2F and virtual worlds:

- More members can experience the conference in ways that suit them best.
- Highlighted events and activities can be recorded for on-demand viewing.
- This method can also stretch the conference timeframe allowing for more content options.

### CONS OF THE HYBRID CONFERENCE FORMAT

There are some cons to the hybrid format which create some additional challenges to the planner:

- There are higher up-front costs for the conference because of the additional layer of technological complexity. These include bandwidth, audio and video streaming, ways for remote members to participate synchronous with the live audience, etc. These are costs that may not be recovered in attendee fees.
- The planning for everyone is more complex as decisions must be made about how to best address a topic or event.
- The transitions between the F2F and virtual content and the experience for the attendees must be as seamless as possible.
- In some ways it is much like holding two simultaneous conference, especially when dealing with breakout sessions.

## Choosing a Format

Choosing the correct format depends on answers to the “Six Magic Questions” in the next section. These include specific needs of the wing, the conference budget, the proposed schedule and content (which can also be influenced by the technology in a chicken-and-egg problem), as well as the external environment (such as the COVID-19 pandemic of 2020-2022). Please note that this pamphlet will primarily address the planning of a F2F conference; however, it will have brief discussions on planning considerations of virtual and hybrid conferences.

## Initial Conference Planning: Six Questions

Here is an interesting bit of trivia: the CAP National Conference, under normal conditions, begins its planning at least 18 – 24 months out from the conference start. A city and venue are selected based on several criteria, and decisions are made about how best to have the most members experience one of CAP’s signature events. Not the work of one person, but rather of a cohesive team of planners, vendors, presenters, speakers, hotel employees, host wing members, and attendees (yes, attendees), the annual conference is the result of careful planning. Yours should be too.

It is common for a wing conference to start planning at least 14 to 18 months out. This is in part because hotels book events at least that far in advance. The more people expected, the more hotel and meeting rooms are needed, the farther out a contract is required. If a virtual conference is desired, planning can be compressed a little bit, but not much. Time also equals quality.

First thing to do is assemble a team to assist in the planning and execution of the conference. Members of this team should include team leads for the following areas (list below assumes F2F or F2F/Hybrid):

- Schedule (at this point only types of sub events, time blocks and number of planned rooms are needed). Titles and speakers are determined later.
  - General assembly/plenary sessions
  - Learning sessions/seminars and meetings
  - Co-conference activities, ceremonies and banquet
- Protocol/Distinguished Visitor (DV) liaison
- Lodging, food & beverage and hotel liaison
- Logistics and transportation
- Conference registration, conference programs and handouts
- Safety and risk management
- Financial management
- Information technology
  - Registration technology/payment protocols
  - Onsite A/V (if used)
  - Remote learning/attendees and on-demand
  - Remote presentations and prerecorded presentations
- Cadet activities and oversight
- Awards
- Marketing and communications

These people, approved by command, will assist in the planning and execution process. These members can be selected from the wing staff, cadets, conference veterans, or others with an interest and talent for working in a conference environment.

## Six Questions for Planning

### Why?



Recall that the purpose of a conference in CAP is to connect, to collaborate, and to celebrate. Notice that this leaves a lot of room for personalization by region or wing. At the same time, they represent strategic objectives or touchstones of the event. It is what sets it apart from other wing-wide activities and is the reason why members attend.

Why is the wing holding a conference? Is it because it's expected? Is it because it's tradition? Is it because a forum is needed to celebrate an occasion or recognize the contributions of members? Is it because information needs to be shared widely among all available or interested members? Could it be because the members need an opportunity to work together and build camaraderie?

In truth, it could be all of these things and usually for a wing conference, it is. All these reasons are relevant and valuable to the membership. All must be considered and defined before getting into the meat of the planning content later on.

### When?

Deciding on a block of time to schedule a conference helps to answer most of the other questions, as it informs questions about site, speaker and DV availability. When scheduling a wing conference, some things to consider:

- Other CAP or civic activities sharing the same time. The CAP calendar should be an automatic consideration, but also look at the calendar for the areas in which the conference may be held. You may not want to book on top of a sporting event, a political convention or other large-scale event which may affect pricing, traffic, hotel rooms and dining.
- Religious celebrations. Consult the web and search for "Religious holidays, 20XX." Try to minimize overlap with major religious observances. The wing chaplain can help with this.
- Major holidays. For some wings, scheduling over an extended holiday weekend is advantageous for them. For other wings, it hinders participation. It's important to carefully consider whether holidays help or hinder participation.
- Spring or Fall. These are the two big conference seasons; but they may also conflict with functions such as weddings and sporting events.
- Major CAP happenings within the region and wing. Is the conference normally planned around wing changes of command time? Is it scheduled for the same

weekend as another conference within the region? Is the conference combined with another event such as Cadet Competition? Every wing is different.

- Friday night through Saturday night? Friday night through Sunday? Saturday AM – Sunday AM? If a hybrid is used, will there be additional original content before or after the conference proper?

## What? (\*denotes items specific to F2F or hybrid conferences)

Going back to the theme and to the “why”:

- What do you want the members to have as a take-away from the conference? These can be cognitive, such as teaching new skills or being exposed to new programs? These can also be behavioral as in, what do you want them to feel about something? What attitude do you want them to carry back to their units?
- What “official” events are to take place? Awards? Displays? Skills development? Meetings? A change-of-command? An “Ask the Commander?”
- What social events are planned? Will there be a reception? If so, will alcohol be served\*? Will other meals (outside of the banquet) be provided\*? Will the wing host a hospitality suite (if adult beverages are served, consider reserving a different one for cadets)?
- Will there be a banquet\* or other Saturday evening event? What form will it take?
- What awards will be presented? Are there any awards (such as Medals of Valor, Distinguished Service Medals, Spaatz Awards or Wilson Awards) which require special ceremony and handling?
- Will the conference be a full-on conference with multiple breakout sessions, general assemblies, other things to do, displays? Etc.? Will it be a “town hall,” where most events are held in one room?
- What platform will be used to support and transmit content to members\*? Will it be solely “push” content (where the content is sent to the user), or will it also be “pull” content (where the user acts to find and retrieve the content)?

There are many other “what” questions that can be asked. To brainstorm, get a group together and discuss the events that have happened previously to consider what took place and whether these events are still desired.

## Where?

*Where* a conference was held used to be a simpler question. The decision was bound by geography, availability, number of people attending (and staying overnight if need be), and budget. Now, *where* can also include whether to hold a conference in the ether: virtually or as a hybrid (a mix of a F2F conference and a virtual conference where members attend remotely). For the purpose of this conversation, let’s look at F2F first:

- Geographic area of the state: wings like to schedule their conferences around the state, so over a few years everyone has a conference close by. North to south, east

to west, the idea is the same. The decision is influenced by availability of facility, cost and relative distance to member population centers. Often small wings try to keep things centralized, but even they will occasionally move around to reduce the stresses on the hosting squadrons or to accommodate areas of the state which may be close “as the birds fly” but hard to reach using highways.

- Will the conference be held in a hotel, resort facility or conference center? Each represents differences in capability and cost. Will it be held on a military base? If so, is billeting and messing available?
- What types of airports are nearby the locations being considered? Do they meet the anticipated needs?

Virtual and hybrid conferences have their own set of “where” questions:

- Where will pre-recorded and “live” events be streamed from? Speaker’s homes? Recordings through a wing’s server?
- Where will attendees access the content? Is the wing going to engage a conferencing service? Will it use utilities such as Microsoft Live? Will it use Zoom for phone conferencing? A combination?
- Where will the content be located after the conference for later viewing? The wing’s website? A conferencing website? For how long will the content be available?

## Who?

On the surface this seems to be an elementary question, but scratch the surface and find that who attends can drive a fair part of the planning process:

- Will cadets attend? This question drives chaperones, alcohol service, activities and learning labs, color guards, whether to hold specific meetings (such as CAC), social events for the cadets; etc.
- Will national and region leadership, elected officials, military leadership, and civic leaders be invited? What roles will they have? Will they be staying overnight? This drives protocol decisions, comped registrations or meals, hotel rooms, and other amenities. Don’t forget to include these comps into your budget. (It’s better to plan sooner and to invite sooner to ensure acceptance).
- Are families invited? If so, consider what may or may not be included into the planning process. What events might they attend? Are additional activities needed just for them?
- Will non-members have access to the content?

## How? (\* denotes virtual or hybrid)

How questions tend to get into the necessary weeds. Among the questions that should be asked are:

- How much are the desired items going to cost (when budgeting, have options to include or discard depending on 3 budgets: lean, expected, desired).
- How will people register?
  - For F2F and hybrid (all-inclusive or add-on for remote and on-demand access?)
  - Remote attendees (hybrid and virtual)
- How will attendees access remote content\*? Do they download an app? Do they need a separate phone line? How fast must their Internet access be?
- How will remote presenters and attendees be trained on using the desired technology\*?
- How should everyone be dressed: CAP casual, service dress? Will the banquet (or other Saturday evening event) require mess dress?
- How will the schedule be segmented?
- How should members be fed? Should all meals be preplanned and part of the package? Should there be coffee breaks and if so, how lavish? How formal should the banquet be?
- How should the conference be marketed?
- How much can the members afford, all in (including lodging) and per ticket?
- How many workers will be needed to pull this off?
- How large must the venue be for what is planned to be accomplished?

Lots of questions to be sure, but let's go back to the beginning... planning should begin many months out and there should be a team of people to help. Some of these questions won't pertain to some conferences. Some questions can be answered with the help of past contracts, conference project officers from neighboring wings or the region and wing staff. Finally, this pamphlet should help.

## Finding a Face-2-Face Conference Site

Much of the time at this stage the wing has decided on a theme and a date. It has decided on areas of the wing where it wants to concentrate its search. Remember, ideally this process begins at least 14 months out from the conference start.

### Location, Location, Location

It's a wing decision whether to locate a conference in a downtown area close to shops, restaurants and other amenities; or whether to locate in a resort town where there might be fewer amenities around the venue but is compensated for by the variety of amenities the hotel provides. (For our purposes the discussion about military facilities is contained in the attachments).

Whatever general area is chosen, when considering where to locate a conference be sure to contact local membership and web-based travel review sites to see how well the area and the venue quality suits your needs, how safe the area is, and whether there are any inappropriate venues which might present a concern.

### Building a Venue Request for Proposal (RFP)

It's a big name. It's a critical step. It's also a great way to help move the vision from brain to paper.

While the specifics of forming an RFP (as well as a sample) is located in **Attachment 1**; for this discussion what follows are major items that may be included in the RFP:

- Duration of the conference (days/nights)
- Probable number of total attendees (members, guests, DVs, staff, etc.). Of this number,
  - How many room nights are required for each night?
  - Breakdown of single v. double bedded rooms
  - Whether hospitality suites are required and for how long
  - Whether disabled-accessible rooms are required and if so, how many
- Top rate desired for a room charge per night. It's okay to low ball a little. Best case is that you get it; worst case is that venues make a counteroffer and the negotiation begins. When figuring this top rate, consider all potential add-ons such as taxes, resort fees, parking, etc., that could add substantially to member cost.
- "Comped "free" room night based on the total number of room nights sold to the group (this is known as "room pick-up." 40-to-50 nights sold for 1 free night (40-to-1 or 50-to-1) is standard). Have the hotel credit the free nights to the final invoice for the contract as this gives you flexibility.
- Waiver of resort fees.

- Access to secure, lockable rooms where the wing has the only key.
- How many meeting rooms are required as well as the number of people you expect to host in those rooms.
- Whether you expect the venue to cater the event, and if so, which meals, snacks, coffee breaks (including number per meal).
- Audiovisual requirements (this includes production capacity and bandwidth for streaming capability if holding a hybrid conference or recording events for on demand viewing)
- The projected minimum amount of \$\$\$ the wing expects to spend on this food and beverage (F&B) before service charges and taxes.
- Guaranteed F&B pricing, set as close to the signing of the contract as possible (so there are no last-minute up charges).
- Whether you wish to receive any special amenities or concessions from the venue, such as discounts, free meeting space, free internet, free parking, etc. Never hurts to ask.
- Payment terms
  - Have the members (other than DVs) pay for their own rooms. Rooms that are comped by the region or wing should be billed to the master invoice.
  - Try to ensure that the room rate for the block extends out a couple of days before and after for those who need to be at the venue early or stay late.
  - Allow for name changes up to 24 hours out for those rooms that the region/wing does book to the master bill, or for which the region/wing has submitted a lodging list.
  - Hotel room nights should be totaled cumulatively (over the entire event) and not totaled per night. This gives you room if one night is light.
  - Honoring the host wing's tax-exempt status (if it has it).

It's better to be conservative about what one is willing to block or spend. Most hotels have something called an attrition rate. This is the percentage of rooms which are contracted but not bought. Typically, at least 80% of the sleeping room nights contracted must be filled without incurring a penalty, including loss of free meeting space and monetary penalties.

F&B must also meet the minimum (*before service charge and taxes*) promised in the contract. This will be paid regardless of whether the food is actually consumed. (More on F&B charges later).

It's also a really good idea to provide a one paragraph summary of what CAP is and to highlight the volunteer, self-paid nature of the organization. This tends to build awareness and goodwill with the venues; who might be more inclined to work to make the conference more affordable.

## Assembling the RFP

Many wings build their RFP based on past contracts with known properties. This can be an effective method if the conference format and schedule doesn't change. However, it's often better to start fresh and begin this step when blocking out the schedule. The schedule is going to inform the number and type of rooms, social events, breaks and meals, and other needs.

The document should be completed, coordinated and approved by the wing commander before sending to prospective properties.

## When to Get at Least Three Quotes

This is the time to start speaking with the wing director of finance and wing legal officer.

It's always good to get at least 3 quotes when planning a conference. Conferences cost wings thousands of dollars. If the wing cost for the venue is \$25,000 or over (F&B, room rental fees, audiovisual, service charges, taxes, miscellaneous expenses covered in the contract) then you must get 3 quotes.

## Sending RFPs

The approved RFP is completed. To whom or to where is it sent? By now, the CPO and team have done some basic research as to the venues in the desired area (No use sending a large wing's conference RFP to a venue with 50 rooms and no food service). For ideas on how to research, consider:

- Monitored travel review and ranking websites where hotels are graded, and photos are a mix of hotel-provided and traveler-provided. While reviews should be taken with a grain of salt; patterns do emerge. Look out for words like "renovation in progress" or "to be completed." While this isn't an instant turn-off and might get a lower price it may also disrupt the conference program or comfort of the attendees. Ask questions.
- Hotel websites: Once you have an idea of a few properties; go to the websites and "swim around." Pay attention to the location, driving directions, number of rooms, room amenities and whether it has a "meetings" or "events" page. If it does, study this page to see if it might be a good fit.
- Contact the local convention and visitor's bureau (CVB). They are a valuable resource in helping to get your RFP out, providing visitor information, even providing incentives to come to the area. They know the town.
- Local members. They are a valuable source of intel about the properties and area.

- Using an online map search, find the hotel and filter in local, walkable restaurants if breakfast and/or lunch are not provided.

Now that all of this is done, it's time to send out the RFPs. Be sure in the communication that goes along with the RFP to include a deadline on when a response is required.

## Use an Aggregator or a Conference Service

It's an individual decision whether to use a service through which RFPs are sent. For large wings, this may be an option. Most are free to the group engaging the service because the company is paid by the hotel which contracts for the event.

If located in a large wing or if looking at multiple areas at the same time this service may be useful. Be aware however that it does not replace the due diligence of the CPO to ensure that the venues which respond through this service actually meet the quality and logistical needs of the conference.

Once initial responses are received, it's time to negotiate.

## The Negotiation Process

Some people really like to negotiate, others don't. If the CPO isn't good at it or doesn't like it; they should partner with someone from the wing who is good at it. Event salespeople negotiate all the time. They have sales targets to reach. Their job is to command a price that the "market will bear." Your job is to get the best value.



### The Initial Read

Sit down with all the responses received from the venues and create a spreadsheet with columns listing the requirements desired and rows listing the venues. Fill out the blocks depending on the answers. (This is really easy if one or two venues respond, but don't skip it as it orders your thinking). Don't forget to recall what is most important to the wing in terms of provisions and amenities.

Have a look at the costs they've listed for room nights, service charges and additional charges, taxes and fees.

Now look at their catering menu to get an idea of meal charges. Review the research previously completed. Pick the top 2 or 3 candidates. Now's time for an initial conversation with the venues.

## The First Conversation with Sales

This conversation is designed to do 2 things: answer initial questions about the venue and CAPs specific needs as well as to give CAP and the venue a chance to get to know each other.

The goal of the conversation for the hotel is to get you to agree to see a contract. Your goal, as CPO, is to learn more about if the hotel is a good “fit.”

- Will the venue suit your specific needs?
- How well will they work with you?
- How satisfied are you with the answers to your questions?
- If this is a new venue to the wing, or the wing hasn’t been there in a while; how open are they to a site visit?
- What other groups are holding meetings/conferences at the same time? Is there any conflict in their schedule or meeting space to what is being proposed for you (such as a wedding reception with a loud band in the ballroom next door)?

Unless a venue being considered is well-known to the CPO and there are no changes to the CPO or the venue’s representative, ask to conduct a sit survey. Most hotels will say yes. If they hedge, and it’s not because its booked because of an event, holiday or other good reason, consider it a red flag.

## The Site Visit



Once the hotel has agreed to a date for a site visit, depending on the travel distance, ask if you can stay the night. While they might comp (give you the night for free) the room, even if they don't stay anyway. The expense is worth it. It gives a chance to see in detail how the venue operates. It's also a good idea to take someone with you to provide a second set of "eyes" and assist with meetings and photos.

When planning the visit ask to see sample rooms, meeting spaces,

speak to the line managers from the different departments (including A/V) and otherwise tour the facilities to be used. A sample checklist for performing a site visit is contained in **Attachment 4a**. Choose the checklist items that best fit the wing's needs.

Also, be sure to try their food and search for the health inspection permits (which are publicly posted). This and sleeping room condition are most remembered conference experiences.

Take photos and note items such as where electrical sockets in meeting areas are located, condition of public spaces, and note distances between meeting rooms, food venues, restrooms (empty, of course) and sleeping rooms.

Consider any physically challenged members – are there steps, elevators, long walks between meeting rooms? Ask about the hotel policy for food allergies. Some hotels will prepare special dishes, some may permit the member to bring in outside food if allergies are severe.

Envision your event in the meeting rooms? Will the ceilings permit the color guard to post easily? Will you require extra screens so all can see the presentation? Are the restaurants large enough to fit your guests in a short time if breakfast or lunch is not part of the conference?

Be sure to meet with the venue's A/V rep and ask if you can bring some of your own equipment, especially laptops and projectors for breakout rooms. Many wings bring these but contract with the hotel for screens, projector tables and other equipment (known as a LCD Support Package w/screen). This saves a lot of money as it is several hundred dollars per projector rented.

If cadets are attending your meeting, learn the hotel policy for minors. Many will not permit minors in the pool or gym area without adult supervision and have other requirements for rooming cadets without parents. Take time to explain the cadet program and why the cadets would be attending.

Know that the venue is going to show you its best face. Let them do that; but also ask polite and thoughtful questions to give you a sense of the venue's ethic, expectations and capabilities.

## The Contract

The RFP serves as the basis of the contract between the wing and the venue. The contract is the legally binding document between the wing and the vendor concerning services provided, costs, terms and conditions of service, payment, postponement/cancellation and other special clauses.

If you remember no other thing from this pamphlet, please remember that *if it's not written in the contract, it wasn't agreed to – it never happened.*

Compare the contract with the RFP and your notes from the hotel discussions. If something was agreed to verbally or in the original quoted response but is not in the contract; contact the venue salespeople and ask that the contract be fixed **before** it is

sent to National Headquarters for review and signature. It is much, much harder to fix a mistake after a contract has been signed. **Note:** *No one in the wing has the authority to sign a contract or to bind the CAP Corporation (of which the wing is part).* Contracts can only be signed by NHQ CAP.

## Hidden Costs: Contract Pricing for Food & Beverage and Service Charges

Hotels count the following against the minimum spend obligations for their contract pricing:

- Base pricing for food and beverage

Hotels do not count the following charges against guaranteed minimums:

- Service charges (usually 24-27% of each item, meal, or service)
  - Sales taxes
  - Fees (such as for excess use, extra attendants or servers at receptions, bartenders, etc).

For example, let's say that pricing for a continental breakfast buffet is \$25 per person. The contract is to serve for 100 people. The base price is \$2,500. However, the service charge for the service is 25% of the menu cost. Let's also say that sales tax is 10% on both the meal and the service charge (known as++) and the wing is not tax-exempt. The question is, what is the total cost to the wing, and how much is credited to the F&B minimum agreed to in the contract?

The equation looks like this:  $\$25 \text{ (base price)} \times 1.25 \text{ (service charge)} \times 10\% \text{ (tax)}$

$\$25 \times 1.25 = \$31.25$  (1.10) =  $\$34.38$  (rounded up) per meal

\$34.38 per meal x 100 meals served = \$3,438.00 total cost

Cost for wing's budgeting purposes: \$3,438.00

Value against the wing's contracted F&B minimum: \$2,500.00

These service charges taxes and fees may also be charged against audiovisual services, labor, delivery and hold charges, etc. More importantly, they are rarely negotiable as they normally are used to offset labor costs. Always remember to calculate these into the total price for the budget.

## The Contract Review Team

This is a good time to define the conference contract review team. Members of this collective at the wing level are:

- The Wing Conference Project Officer (you)

- The Director of Finance/Finance Committee
- The conference planning committee
- The Wing Legal Officer
- The wing's senior leadership team (as defined by the wing commander)
- The hotel's representative (using a separate communications channel)
- The wing finance committee should vote to approve the contract prior to submitting it to NHQ for signing as it financially obliges the wing.

Once everyone agrees to the terms and they are written satisfactorily into the contract, the review team expands to include:

- NHQ CAP's Contract Manager
- CAP's General Counsel
- CAP's Chief Operating Officer (who ultimately approves and signs the contract on behalf of CAP)

DO NOT skip this step. Conditions under which charges may be added, penalties incurred and postponements and cancellations by either party must be defined before signing. The wing legal officer and Wing FM should have a review before it is sent forward to NHQ for final review and signature. It's better to negotiate earlier, before it's sent to National Headquarters.

# Documentation and Reporting

The wing should have two items to assist the CPO in planning the conference: a robust continuity book for history and to act as an operations plan; and a separate annual conference book or electronic file containing all the required items for this year's event. (Sample Table of Contents for each are found in the attachments). These items will be invaluable to the planning staff... and to you.

## Legacy Documentation

Some assume that a continuity book and an annual conference book are essentially the same. They are not. It's true that they each contain some of the same items, but they are designed to be used for different reasons and are useful for different lengths of time. Let's consider the differences.

### Continuity Book/Operations Plan

Whereas staff positions have continuity books covering the job, in this instance continuity covers an activity type. The continuity book (for brevity's sake) is the conference planning legacy document. It serves as the history of the activity, a place to store plans, procedures, checklists, to incorporate lessons learned, past contracts, venue history and all the other long-term or permanent information about an activity.

Continuity books can be either hard-copy or electronic, depending on preference. Many people, however, store them both ways and keep a hard copy. It's easier to read. A sample table of contents for a conference continuity binder is in **Attachment 2**.

### Annual Conference Binder

The annual conference binder (electronic, hard copy or both) contains all the documentation and history needed for the conference at hand. Unlike a continuity binder, it doesn't contain history, lessons learned, or plans per se. The conference binder contains all the pertinent checklists, timelines, budget, venue information, registration information, contracts, contacts, and program information for that year. A sample table of contents for an annual conference binder is in **Attachment 3**.

## Important Conference Documents

The documents discussed in this section will make it into the annual conference binder. Many of these will also find a home in the continuity binder.

### Checklists and Timelines

Conference planning is made much easier with a robust checklist and timeline system. While it's impossible to think of everything, good checklists and timelines get to the

90% solution and serve as the basis for both completing the tasks at hand, as well as stimulating discussion about how to improve those tasks.

Checklists and timelines are tailored by wing and by event. The following list contains many of the ones used by CAP for its F2F annual national conferences (samples of many are included in **Attachment 4**):

- Master deadline checklists
  - Pre-conference
  - During conference
  - Post-conference
- Site survey checklist
- OPR checklist (each OPR is responsible for including their own checklists which are included in both the continuity book and annual binder)
- Sub event checklists
  - Seminars
  - Protocol
  - Banquet
  - General assembly
  - Awards
  - Meetings
  - Lodging
  - Food & Beverage (F&B)
  - Budget
  - Marketing and social media
  - Registration, conference programs and bags
  - Social activities
- Packing list for Conference Project Officer (often overlooked, but critical)
- Emergency checklists:
  - Power outage at venue
  - Medical emergency/non-emergency
  - Fire/natural disaster at venue
  - Member victim of crime checklist
  - Theft of CAP property checklist

## Planning Spreadsheets and Documentation

Determining what should take place at a wing conference is covered in the section “Planning Conference Activities.” How these activities are plotted, documented, shared and evaluated will be discussed.

Spreadsheets are “good friends” to have. Budget spreadsheets make math easier. Schedule spreadsheets make combining place, time, activity and requirements easier to view holistically. Finally, it makes sorting item requirements in multiple ways easier.

The following conference spreadsheet types have been found to be most useful, especially for larger events:

- Conference budget
- Master schedule
- Room block schedules (by day)
- Audiovisual requirements (by day and room)
- Learning Session/seminar, activity, and meeting by department
- Food and beverage
- Registration by type
- Venue research
- Master lodging list

It seems like a lot, and for small conferences not all may be needed. The good thing however about a spreadsheet is that, with copying and a little tailoring, specific reports can be generated meeting specific needs. For instance, the Seminar, activity and meeting by department spreadsheet can be easily adapted for the hotel's audiovisual department with a different sort to show them what is needed for their quote. The same basic spreadsheet is also adapted for the hotel event staff for room set up. Samples of these spreadsheets are found in **Attachment 5**.

## Floorplans

No conference is complete without floorplans. The venue provides a basic map of the facility, along with square footage and seating capacities for each basic floorplan offered:

- Theater
- Classroom (or schoolroom)
- U-shape
- Hollow square
- Conference
- Reception
- Banquet (rounds of 8 or 10, with or without buffet)
- Auditorium (half-moon)
- Exhibit Hall

The basic numbers shown in the venue literature assume that only the basic floorplan is incorporated and that the room is filled to capacity without such things as additional tables, aisles, projection, podium or other amenities.

It's important to discuss with the venues how a specific floorplan is envisioned, so there are no surprises. Most venues' sales agents can use special floorplan software which can blueprint how a room will look when equipped with desired seating and amenities. If

the conference continuity binder has a sample floorplan from past year's that is desired, go ahead and share it with the venue so that they can help adapt it to the new space.

Two other notes about floor plans: first, a seat set as described above usually doesn't have an additional charge. They'll put seats and tables out as part of the basic room charge (or free if the meeting room is comped). Additional amenities, such as "pipe and drape," screens and projection, staging, any audiovisual (including microphones), special lighting, hanging banners from the ceiling, exhibit hall draping, etc. will come at extra charge. The good news is that almost all these charges can be negotiated.

The second note is that floor sets can be changed during the day usually without charge if two conditions are met:

- The venue has agreed in advance and planned for the change (because they must get the labor)
- There are no chargeable amenities not previously agreed to.

## **The Contract**

As discussed previously, the contract is the single most important document to have (and to get right) when planning a conference. This represents the legal and binding agreement between CAP and the venue. How the contract is carried out depends on the additional work done by the CPO and the venue. This work and the associated requirements are expressed by the CPO in the form of checklists, floorplans, menus, spreadsheets, etc.

## **The Banquet Event Order**

The venue expresses how it understands CAP's requirements in the form of floorplans as well as something called a banquet event order (BEO) (see sample in **Attachment 6**). The BEO is the document that tells the event staff and the banquet staff exactly what is needed when, where and for how long. A BEO exists for each room and/or each activity *each day*. It discusses

- How rooms are set up.
- Number of seats.
- Whether food and beverage are required (the actual F&B is shown separately).
- Whether the room needs to be rekeyed.
- For how long the room is being used.
- If A/V support is required (the actual A/V requirements are shown separately).
- If a tailored floorplan is to be used.
- Any other special requirements such as specific colored table linens, centerpieces, small table and setting for POW/MIA table, wider aisle for color guard, awards table, etc.

The BEO is the only thing that the on-site venue event staff will rely on to make sure that rooms are set properly. Your venue representative may not be on-site during your event and the BEO relays all your requirements to those doing the actual set-up. Review it carefully against the requirements negotiated with them to the venue. Once it is signed by CAP's representative and the hotel; it's the way it's going to be.

Tip: Always carry copies of this as well as the spreadsheets, and the contract in the annual binder and bring with them to the venue. Don't rely on looking at these on a smart phone or tablet.

## The Invoices

The invoices start flowing in from vendors even before the conference begins. Some are easy to reconcile against the budget. You either did or you did not pay \$10.37 for a role of ID card stock.

The invoice from the venue, is, obviously, more complex. Depending on how audiovisual was contracted, it may or may not be included on the master invoice. If it is, master invoices are normally billed by-day and aggregated. Items to watch for:

- Reconcile the invoice against the agreed-to prices as stated in the contract and official quotes.
- Ensure that the quantities and menus accurately reflect the BEOS and final counts guaranteed to the venue.
- Ensure that comped rooms are reflected in the master bill.
- Ensure that there are no unauthorized room charges (sometimes members receiving comped rooms might order room service, parking or a movie that should be billed to their credit card but makes it onto the master bill accidentally).
- Ensure that no alcohol is on the invoice. CAP funds cannot be spent on alcohol.
- If cadet rooms' pay per view is turned off (and you should ensure that it is), make sure you aren't billed for it.
- If the wing is sales tax exempt, ensure that it isn't on the bill.

Note any discrepancies and contact the venue's sales manager and their accounting department to see how best to straighten things out. Remember that the end of CAP's fiscal year is 30 September. All invoices should be paid by that date.

## The After-Action Report (Hot Wash)

The after-action meeting (also known as the hot wash) usually happens within 2 weeks of the end of the conference. Sometimes it is treated as a pro-forma activity, and this would be a mistake. The after-action meeting is a wonderful chance to review the conference and gather lessons learned from those who staffed the conference – while

minds are still fresh with the detailed on what went wrong and as important what went right.

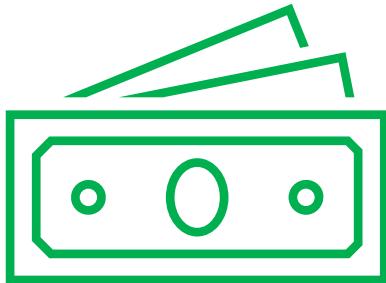
To get the most out of the meeting, the CPO should schedule the meeting, inviting all the OPRs on the conference staff as well as the wing chief of staff and any other critical stakeholders. To keep the meeting on track, prepare an agenda, (on this occasion use PowerPoint to focus attention), and have some butcher paper or a whiteboard to gather ideas and suggestions.

Finally, the CPO, who chairs the meeting, asks someone to take the detailed notes. It's impossible to run this meeting and take notes at the same time.

Schedule an hour. If it can't be said in an hour or less, schedule separate discussions for the hard-to-sort items.

The document produced from the meeting and notes goes into the continuity book as a lessons learned document and informs the next year's conference planning process.

## Budget



At this point in planning, the structure of the planned conference is in place; number of rooms, amenities, food and beverage, audiovisual requirements, printing, supplies, and most other expenses are apparent. Remember, at this point aside from the venue contract being signed, the basic structure of the conference and needs and desires are known, but not purchased. A sample budget is in **Attachment 7**.

At its heart, a budget comes down to two columns: income and expenses. At the end of the conference income must equal or exceed expenses. It's really just that simple.

Conference expenses represent any cost that is tied to the planning, execution and closing of the conference which the wing pays for itself. If members are paying for their own hotel rooms, it's not reflected on the conference budget. If the hotel is direct billing the wing for all hotel rooms (as in CAP collect the money and issues sleeping rooms to attendees registered), then it is part of the budget. This is why we recommend having members reserve their own rooms using their own credit card (in hotel-speak, this is called "Each Pays Own, or EPO").

Conference income in CAP is mostly represented by attendee registration and any sponsors the wing attracts.

## Calculating Expenses

Calculating expenses can be quite detailed. That said, most expenses can be grouped together into larger categories. Consider having each team lead on the conference committee (IT, Registration, Administration, Protocol, Food and Beverage, Awards, etc) present their own budget for their own area. Working with the Conference Finance Officer and Wing Finance, the CPO collects these and creates a master budget calculating all the expenses. Don't forget to use the wing's tax-exempt certificate if it has one.

Get prices for all item categories and all outside vendors to determine accurate numbers. Ask the hotel to provide pricing based on the requirements specified in the F&B, room set and audiovisual spreadsheets you provide to them. After negotiation (venue audiovisual quotes can usually be negotiated down and food and beverage tailored); estimate fuel, etc.

## Determining Registration Prices

Most planners have a target number for registration and banquet that they wish to meet. This number is based on tradition as well as an estimate of the actual costs.

Once this master number is established, for discussion's sake it's \$15,000.00, determine if, and if so, how much, any sponsorships or wing seed money will be used to offset expenses. This is done prior to calculating what to charge the attendees. Let's say that the wing has a sponsor and also wishes to kick in some money. The offset is \$3,000.00. Subtract the offset (the income not generated by attendee fees) from the total expenses. This total,  $\$15K - \$3K = \$12,000.00$  is the amount that is ultimately charged to the attendees.

### Breaking Out and Pricing Registration Events

Almost all conferences have a 2-3 tiered pricing structure for conference attendees:

- Cadet or Adult
  - Conference Only
  - Banquet Only
  - Conference and Banquet
- Early-Bird
- On Time/Onsite

Cadets can be charged less, at least for the main conference if there is room in the budget. Some wings also create a cadet package which includes an all-inclusive rate for cadets: shared rooms, meals and registration.

It's also a good idea have early-bird and regular registration, where price goes up each time a deadline passes, at the end an onsite registration costs the most. This is used to incentivize early registration so that conference planners and the hotel have more accurate numbers.

Calculate the cost of a banquet ticket and a conference ticket to break even, then charge \$2-3 more for whichever category and whichever option paid. Why? Some costs are fixed and must be recovered no matter how many people actually purchase. The \$2-3 extra isn't profit, it's a buffer between anticipated attendance and reality.

In the above example, one anticipates an ultimate charge of \$12,000.00 to the attendees, with \$7,000.00 of that allocated to the banquet. Next, estimate the number of expected attendees, paid and comped (free): Let's say the gross number is 200 people will register for the conference and 140 will register for the banquet.

Of those, 10 are comped basic registration for a total of 190 paid registrations and 10 people are comped for the banquet. This leaves 130 people paying for the banquet. The per paid attendee (PPA) represents that cost. Here's how the numbers look:

Day Conference Cost:	\$5,000.00
Divided by Day attendees paid	190 people
Cost PPA	\$26.32 per paid attendee
Banquet total adjusted cost:	\$7,000.00
Divided by Banquet Attendees paid:	130
Cost PPA	\$53.84 per paid attendee

Now that the PPA is known, it's time to value the tickets. For simplicity's sake, cadets and seniors will be charged the same.

## Investment and Implied Value

It's definitely true that CAP members are on a budget. But it's also true that CAP's wing conferences hold a lot of value for the member and that many of the presenters are top-notch and also are looked to as subject matter experts in their field. Simply because they might be donating their time and talent doesn't mean that their presentations are worth less than if they were charging. Many of the wing conferences have content that would be valued in the hundreds of dollars per attendee if the conference was held by a for-profit company.

This should be noted because although the day conference (in this simple example) may cost each paying attendee less than \$27.00, its real value to the attendee is much more. It should be priced as such. It's reasonable to charge \$20-\$25 more than the actual cost. This does two things: it implies value to the member for time and effort spent. It also further offsets costs for people who are comped, who do not show up and for the banquet.

Configure the pricing structure to aim for the target registration cost while including a buffer of \$2-3 per paid attendee to account for unanticipated expenses. In the above example, a \$50.00-day conference registration, a \$65.00 banquet ticket and a \$100.00 All Access pass (representing a \$10 discount to the member over paying for events separately) isn't unreasonable.

The key to an effective budget is a realistic and accurate breakdown of costs and anticipated attendance.

# Planning Conference Activities



In preliminary planning to determine venue requirements, a good idea of subevents, time blocks and room layouts was needed to develop the RFP and to help drive contract negotiations. A sample room block schedule is in **Attachment 5**.

## The Role of the Conference Committee

The primary role of the conference committee (of which the CPO is the Chair) is to do three things:

- Plan and budget for the conference.
- Oversee conference preparation and ensure the conference succeeds during the event.
- Draws and incorporates lessons learned for future events.

The composition of the team was discussed in the section “Planning to Plan a Conference.” The heavy lifting of conference planning though, begins here. Here is where the details are completed.

## To Budget or Not to Budget First

Whether to budget or not budget before the events and activities are drafted is a matter of how the wing does business. Most of the time for the standard F2F conference, member attendance and revenues, and what the wing believes that members will pay and the costs of the previous couple of years factor into the planning of the current year’s event. For the purpose of this pamphlet, let’s assume that the conference plan is drafted first, and a budget created. Then, the conference plan is either beefed up or scaled back depending on the costs. More on the budget later.

Once the room block schedule is created, it is then known how many slots for meetings, seminars and other events can be placed into the venue at max capacity. Now is the time to bring a team together to fill those rooms and that time.

## Big Moving Parts

Following is a list of the major facets of a typical F2F conference.

- Budget
- Conference Registration (in advance and onsite)
- Hotel reservations (if possible, allow the hotel and the members to handle this themselves. All that is needed to do here is to provide the hotel's group booking link).
- Awards
- Speakers.
- Seminar mix.
- Meeting schedule.
- Organizing hotel space.
- Cadet chaperoning and activities.
- Vendors, such as Vanguard.
- Preconference marketing.
- Conference A/V.
- Risk Management.
- Printed materials and SWAG (Stuff We All Get).
  - Conference Programs.
  - Banquet Programs.
  - Venue maps.
  - Name badges.
  - Tickets for special meals or meal choice (if more than one option offered).
  - Notepads and pens (if offered).
  - Tote bag (if offered).
  - Attendance rosters for special events/classes and to note in member records for Education and Training.
  - Onsite registration and receipt forms.
- Morning and evening emcee scripts.
- Morning and evening PowerPoint presentations, videos.
- Internet access for presenters as required.
- Recording and streaming for webinar and on demand.
- Protocol (especially if national leadership is present).

## Event Mix

In general, what events are “must haves; “nice to haves” and “maybe we can work it” is determined by the committee, wing commander’s vision, the event’s duration, the venue’s capabilities and the added cost, if any.

## Must Haves

Every wing has its own set of must have activities and events for their wing conference. These normally follow the three basic reasons why members attend conferences:

- To connect.
- To collaborate.
- To celebrate.

For most, getting this done includes

- a morning assembly with presentations and awards.
- seminars for enrichment and growth.
- A final evening event such as a formal banquet, buffet, or reception with a keynote speaker and awards.

Most wings use their wing's color guard to post and retrieve the Colors; many have the wing chaplain perform an Invocation and benediction. Nearly all wings have a POW/MIA table at their banquet.

In many, if not all cases, members of the national command or national staff attend to bring national perspective and prestige to the conference. For many of our members, the wing conference represents the first and sometimes only chance to interact with the National Commander, Vice-Commander, Chief Operating Officer or other senior official. It is often a highlight of their membership, especially a cadet's. More information about inviting national leadership or national staff is available by contacting CAP National Headquarters.

## Nice-to-Haves

Nice to have activities and events provide additional entertainment and organized food and beverage, more opportunity for growth, as well as accommodate other CAP activities which can be run using the conference facilities either during the conference proper or the day before or after the official conference. The Conference Committee should rank order the nice-to-haves so that if there is space and time available, activities can be added. Some examples include:

- Cadet Advisory Council meetings.
- Commander's Calls.
- Review boards.
- Official meetings.
- Multiple seminar rooms running at the same time.
- Receptions and hospitality suites.
- Coffee breaks with or without food.
- Meals included with registration.
- Cadet displays and competitions.

- Interdenominational or denominational religious services (or transport to local churches, mosques, and synagogues).
- Virtual conferences, web streaming and on demand access for those who can't make it to the conference proper (known as hybrid).
- Vendors and/or historical displays.

## Maybe We Can Work It

The “Maybe We Can Work It” activities represent dreams of what “the perfect” conference for the wing could be. This doesn’t mean it’s a waste of time to plan it out. In fact, this year’s “maybe we can work it” becomes next years’ must have. Wouldn’t it be nice to reach back to a plan that thinks through the possibilities?

Now that these lists are done, it’s time to work out the major events based on the must have’s and the prioritized nice to haves. Again, this pamphlet concentrates primarily on a F2F conference and for discussion’s sake takes place on a Friday night for arrivals and continues all day Saturday.

## Major Items Around Which a Conference is Built

The following discussion represents typical minimum conference needs. Additional activities, such as a Friday night reception, hospitality suites, continental breakfasts, coffee breaks, etc., can certainly be included in your wing’s conference plan.

### Registration Onsite



The majority of attendees will have registered prior to the conference. Assuming the event takes place at a hotel, the attendee list can be matched against room reservations for the group block. It’s a good idea to do this to see if there are names on one list but not the other; and also, to ensure that cadets don’t show up for hotel rooms or for the conference without the conference staff and commanders knowing about it.

If people are arriving the Friday night before, as a convenience consider offering a couple of hours of registration that evening. It gives members a chance to get situated and cuts down on the lines to pick up materials and any onsite registration sales on Saturday morning when those who aren’t staying at the hotel arrive.

Your on-site registration table is the first impression your guests get for the conference. The table should be organized and orderly, with sufficient and friendly help on hand to avoid long lines. Registrations should be completely processed, any handouts (tickets, program, receipts, SWAG) coordinated, and any issues (such as payment due) clearly

marked. Ideally the person(s) processing the registrations should be in the registration area to assist with any problems.

## Conference Dress Code

While the banquet dress code is discussed later, it's worth taking a moment to discuss uniforms during the conference.

While dress codes are less formal in corporate and military cultures, Region and Wing conferences are, at their heart, a business occasion. Additionally, these events are held in public spaces where members are representing CAP within their communities. It may be inappropriate then for conference members to wear utility uniforms, flight suits or other casual attire. Try to aim for the dressier end of business casual. If Air Force-style uniforms are worn, members wearing them must conform to weight and grooming standards as well as know how to demonstrate basic military customs and courtesies.

However formal the dress code chosen, it should be prominently, clearly, and repeatedly communicated in conference communications.

## Saturday Morning Activities (The Morning Assembly)



The Saturday morning general assembly is the official kick off for the conference. When is the right time to begin? Most wings start between 0800 – 0830 and rarely continue more than 2 hours (with an intermission about halfway through for a thorough leg stretch). If morning seminars are planned after the general assembly but before lunch, schedule to ensure that the assembly ends with about 15 minutes for people to find their seminar rooms.

If the general assembly is being live streamed or recorded for on demand consumption, consider having two breaks to allow for better segmentation of the video recording.

A typical general assembly schedule might look like this:

- 0800: Call to Order and arrival of head party, Posting of the Colors and National Anthem, and Invocation
- 0810: Safety brief of the venue and administrative announcements
- 0815: Introductions of Distinguished Guests

- 0818: Wing Commander's presentation
- 0830: Region Commander's presentation
- 0840: CAP-USAF Presentation
- 0850: Intermission 1 (10 minutes)
- 0900: National Staff presentation or National Commander's Presentation
- 0915: Wing Commander's Introduction of Keynote speaker (if the keynote is not the National Commander)
- 0917: Keynote Address
- 0930: Morning Awards
- 1000: Dismissal to break and seminars beginning at 1030

Of course, this schedule can be adjusted to specific needs. Smaller wings may prefer to have all of their awards presented at the banquet. Not all speakers listed above may be used. Additional items such as videos may be presented.

One thing to remember though is that no matter how a schedule is filled, it must start and end on time. Better to schedule conservatively and end on time than try to pack it in, end late and spend the rest of the day catching up.

## Breaks

Breaks throughout the day and during the morning and evening programs are essential for the attendees. You want them to be invigorated after a conference, wanting more and looking forward to next year. You don't want them to be exhausted when they leave.

If there's budget for it, by all means serve coffee and tea during breaks. A tip gained from experience: if serving coffee, include a gallon of decaf. People do drink it and they *really* miss it when it's not there.



And, if there's budget, consider serving cookies or pastry during at least one of the breaks. Catering books say to plan for 1.5 pieces of pastry per person. Experience shows to plan on 2 pieces. It is expensive, but it is also appreciated.

Try not to serve finger foods such as potato chips, peanuts or pretzels unless they come in single serving bags or there are serving utensils and cups or plates. It's a sanitary issue and make for greasy hands.

## Saturday Evening Event

The region's or wing's gala event. It is a wonderful and elegant affair, and most wings do a banquet or a buffet. It's steeped in tradition and is a time to come together and celebrate like no other time during the year. For new cadet or 50-year member alike, it is a special occasion.

### ELEGANCE ON A BUDGET



There's no getting around that banquets are one of the top two most expensive items for a wing conference (with the other being audiovisual/room rental). There are ways to get the most for the wing's dollar and to help make the event a special one.

### THE RECEPTION

By all means, have one. If a region or wing decides to make alcohol available through a cash bar (and most will), choose also to have soft drinks available for designated drivers and for cadets. Some hotels will work with the wing to provide a soft-drink only bar for cadets at a reduced rate. It's worth it to ask.

Choose a space that has natural light, if available and that isn't overly dark. Try to make sure that the space has room for people to move around and not feel crowded. In addition to bar tables for people standing, try to have some seating available for those who need to sit for a minute, or who have mobility issues.

### THE DINING AREA

It seems small but choosing the right tablecloths and napkins for the tables can really lend to the room's appearance. Most venues use white table cloths, though some venues are going with laminated tables and no table cloths. Either is fine. Take a minute though to consider the napkins. Try to make sure that the color doesn't clash with the carpet, the chairs or the walls of the venue (sometimes it can't be helped, but it's worth a thought). Plan the table linens in advance, especially if you need a particular color that may need to be rented.

Banquet programs seem like a throwaway item, but for many attendees it is an annual souvenir, and a well thought and executed program can both be inexpensively made using a color copier and signal the quality and dignity of the evening. Here, the little things matter: spelling, spacing, grammar, and print quality. Make 15 more than the

number of seats guaranteed to the hotel. Some are lost, some are soiled, and folks always seem to ask for one when none are left.

Table decorations can take many forms. Sometimes the venue will offer to put a mirrored tile on in the center of the table with some marbles, candles or pebbles. The wing might want to provide flowered centerpieces that people can take home (please, no fake flowers). Some place mini US and CAP flags. Many hotels no longer permit lighted candles so battery-operated candles may be needed.

In all cases, if using assigned seating, number the tables (be sure your guests have a way to know to which table they are assigned – such as a number on their ticket). This is necessary so that the staff can know who has special meals (based on the list and seating plan provided). If tables are reserved for specific people, then have place cards with names, grade and/or title at each reserved seat (double-check name spelling!)

POW/MIA tables are poignant way to honor those who gave so much for our freedom and were either captured or never made it home. CAP wishes to honor these brave souls and the loved ones they left behind. Please have a POW/MIA table. The ceremony script is contained in **Attachment 8**.

Head Table or No Head Table? That depends on wing tradition, the size of the room and the commander's preference. Some commanders and wings like the formality of it. Others prefer to be seated in rounds with the attendees. There's really no right or wrong answer on this one.

As a minimum, the flags present during the banquet are

- the Colors.
- the CAP Wing's flag and
- the flag of the senior general officer present (they bring the flag, the wing supplies the stand, pole and topper).

Other optional flags and guidons which can add a lot of class to the room and recognition to the attendees include:

- the USAF flag.
- group and squadron guidons (squadron guidons can be trooped into the room by cadets as a ceremony).

## THE FOOD

The buffet or plated meal choice is dependent on time, number of attendees, cost and tradition. Buffets can provide more choice without as much need to track who is eating what; but it can be time-consuming for large groups and incur additional cost. Many venues are changing how they serve buffets in light revised sanitary practices and health codes vis-à-vis COVID 19.

The plated meal can also take time but can be more sanitary and incur less cost. The tradeoff is that if multiple entree options are served, it must be carefully tracked and made known to the banquet staff so that everyone gets their preferred choice.

Every wonder why a lot of banquets serve chicken? Meal choices seem easy, but there are some things to keep in mind:

- Dietary restrictions
- Religious considerations
- Appealing to the widest possible audience
- Cost



Common food allergies include tree nuts, shellfish, peanuts, dairy, and wheat or gluten. The good news is that the chef can adapt many recipes to omit ingredients listed. An example is omitting the almonds on green beans (listed on the menu as green beans almandine) or omitting pine nuts on a salad. Where something cannot be omitted because it is the essence of the dish, another option can be substituted if they have advanced warning. This substitution can either be banquet-wide or dialed into the few people with the restriction.

Another consideration is religious. A primary example is the service of pork products, which are forbidden in Jewish and Muslim culture. If a box lunch is served, consider serving 2 options, or limit the choice to chicken, roast beef or turkey. If bacon is served for breakfast, consider also adding turkey sausage.

In many Jewish traditions, only kosher meals are consumed. Yet, few venue kitchens are equipped to prepare these meals because of the preparation and oversight (which must be done by a rabbi). Its important early in the process to ask the venue whether they can either prepare kosher meals or to contract to have these meals brought into the venue for service. If it is not possible, be sure to state this in the conference banquet purchase materials.

Stick to commonly preferred items and select items that can stay moist for a while. Garden salads or spinach salads are common fare and consider offering the dressing "on the side". Include a sauce, gravy or an au'jus (herbed broth or stock) with the entree. If fish is to be served, offer another choice as it is not as preferred as chicken or beef (though beef is expensive).

Dessert is a highlight of any meal, and particularly at a banquet. Usually only one choice is offered, with a fresh fruit plate option for those who have a dietary restriction.

Avoid ice creams as they tend to melt by the time everyone is served. Cheesecakes and chocolate desserts (avoiding nuts) really do get the most compliments.

Please note that these same considerations are also useful for planning reception foods.

Finally, if multiple meals are served throughout the conference; please try to avoid having the same item twice.

NOTE: Many corporate conferences, and even the CAP National Conference have moved towards a Saturday evening event that is less structured with carving stations and heavy hot and cold hors d'oeuvres and dessert. Rather than assigned seating, a variety of standing and seated options are offered so that attendees can sit with whomever they wish. The room can include music and a dance floor. There are no speakers and is an excellent chance for everyone to relax. These events can even be held away from the hotel at another venue, such as a museum. The point is that there are a lot of options out there to create a memorable occasion.

#### EVENING EVENT DRESS CODES

Because these events are held after 1800 hours and can be designed to be formal affairs, many regions and wings encourage formal wear. Mess dress, cocktail dresses, gowns, tuxedos or dark suits and the semiformal uniform for cadets greatly contribute an atmosphere of elegance and celebration.

Pack a few extra neckties, clip on bow ties and tie tabs for borrowing. And consider a "smart business casual" through formal dress option so that all may feel included.

State the desired wear for all activities at the time members purchase their event tickets. Remind them in any preconference communications and send a special e-mail to unit commanders asking for their help.

#### GUEST KEYNOTE OR NO GUEST KEYNOTE

Guest keynote speakers can be a valuable part of the banquet or buffet experience (though for a reception format it is not recommended). Such people are normally not from CAP, or very senior people from CAP who have not spoken during other portions of the conference. All should have some affinity with the organization, with one of the missions of the organization, or with the theme of the conference.

Keynotes should be set as soon as possible in the conference planning process; and continuously engaged throughout the period leading up to the conference. Make them familiar with the organization, the conference theme and the people with whom they interact. Other items of which to be mindful:

- They may want an honorarium or travel costs covered. This is standard practice. At a minimum however, be prepared to comp conference registration and all paid activities at the conference including receptions and banquet.
- If staying overnight, comp their room.
- If driving, comp their parking and fuel.
- Assign an escort (senior cadets are great for this) to assist them during their time at the conference. It's extremely rude to leave a conference guest to fend for themselves or alone unless they wish to be.
- Provide an amenity basket or gift of water, a CAP-branded notepad and pen, and snacks of preference.
- Ensure they understand the topic, equipment available for them to use during the presentation; a deadline by which any presentation media needs to be submitted and a timeframe around which to schedule the talk (10-15 minutes is standard).
- Ensure that the presenter provides a biography for the banquet program. From this, a narrative for the emcee's introduction in the script can be written. Tip: Be sure the emcee knows the proper pronunciation of the guest's name.
- Provide a presentation gift for the wing commander to confer immediately after the address. This gift should be worth between \$20-\$25, but not more than \$25 as many corporate and government ethics rules prohibit the acceptance of gifts priced higher than \$25.
- Ensure that the presenter is given a proper send-off when departing the conference.
- Write a thank-you note signed by the wing commander and sent not later than the week after the event. It can be sent via e-mail, but it is much more appropriate to send hard copy by regular mail.

## Awards Ceremonies

The highlight of the annual conference is the awards ceremony (ies). CAP can't pay people for their work; we charge for it. We do, however, have awards with which we say, "thank you" and "well done." It's very important to the members being recognized and to the other attendees watching that the awards presentations be done with attention and style.

### TYPES OF AWARDS

Generally, CAP awards fall into the following types:

- Cadet and senior milestone awards
- "Of the Year" awards
- 30, 40, 50-year membership awards
- Personal decorations (Certificates for Lifesaving and above)
- Squadrons of Merit and Distinction
- Special recognition (plaques, trophies, contest winners, etc)

All should be given with the same dignity. Many have recommended minimum rank or grade requirements for the presenter. For instance, Spaatz Awards stipulate that a General Officer, US Congressperson, Governor, or higher present the awards. This reflects its prestige.

Sometimes a receiving member does not wish to have the award presented during the region or wing conference. These wishes should be granted. In other cases, they cannot be present. The unit commander could receive the award for the member, or the member can be mentioned in the program.

## PROTOCOL

Whether received on stage or on a dance floor below, the standard is “Take, Shake, Smile, Salute.”

Here's how it's done:

1. Take: The member walks up to the presenting official. The presenting official either pins the award or hands the award to the member who receives it in their left hand.
2. Shake: Member shakes presenting official's right hand, which is held.
3. Smile: while both face the camera for a photo.
4. Salute: Member salutes the presenting official (if the official is not a CAP or military officer in uniform, omit the salute, briefly shake hands, say thank you).
5. Member departs back to their seat.

It goes without saying that the script and the order of awards going up to the presenter should match. If a mistake is made, please remind awardees prior to the ceremony to take what they are given and return after the ceremony to get things straightened out.

## TIMING

Most regions and wings try to split their awards between the morning general assembly and the banquet or buffet event (if they have one). If the conference serves lunch this is also a fine time to present awards. How the awards are split is dependent on the number of awards and the amount of time it'll take. The key is not to keep the awards session so long that people check out.

Major awards (as the wing defines it) are usually presented at the banquet or the most formal general event. These typically include Cadet and Senior Member of the Year, Spaatz and Wilson Awards, 50-year Member awards, Distinguished Service Medals (DSM) and Silver and Bronze Medals of Valor.

### *Citations*

DSMs and the Medals of Valor are accompanied by the award citation. These should be read. Other personal decorations have justifications rather than citations. Justifications

serve a different purpose in that they are designed to inform an awards review board and command chain of the member's eligibility and fitness for the award. It is not designed to be read like a citation is.

If one wishes to announce the reason why a decoration is being presented and there is no citation, rather than read the justification, briefly summarize the justification in a short paragraph.

## Nice to Haves and Maybe We Can Work It Items

The items on these lists really add texture and engagement for the attendees. It's also advantageous to the wing to blend some of the mandatory meetings with the conference to reduce cost and travel time, especially in the larger wings. While more and more meetings are becoming virtual, there are benefits to the occasional F2F engagement.

### TOWN HALL STYLE CONFERENCES: THE SMALL SPACE CONFERENCE

A "Town hall" style conference offers the advantage of a reduced footprint in the hotel, thus lower facility costs. Historically, a town hall refers to the main government building in a town where citizens could meet to receive the news of the day or discuss pressing issues. The premise of a town hall style conference is based on the concept that most activities will be held in one large room or "hall".

The General Assembly will remain traditional in arrangement. The difference between traditional and town hall style is that the break-out sessions will be in a townhall meeting format. There could be up to three sessions. Each session will have directorates from related fields present and center. Each will be allowed an established amount of time (5 minutes) to make a quick presentation. The remainder of the time will be for audience interaction. Visiting members from NHQ, national staff, etc. will be invited to participate. This type of conference leaves a very small footprint with the facility and reduces the cost of doing business. There is one projector and one screen each for the main hall and cadet activities, which will be held in a separate area; however, cadets are welcome to join the audience at any time.

Example:

Period I:

Wing/Region Command Staff, visiting VIPs

Period II:

Operations, Stan/Eval, Homeland Security, Safety, and Aerospace Education

Period III:

Admin, IT, Professional Development, PAO, Chaplains Services

Break-out rooms will be provided for Cadet Speak-Off, CAC meeting, Cadet Programs, DCPs

Displays: (Flight School) with a possible table-top flight simulator

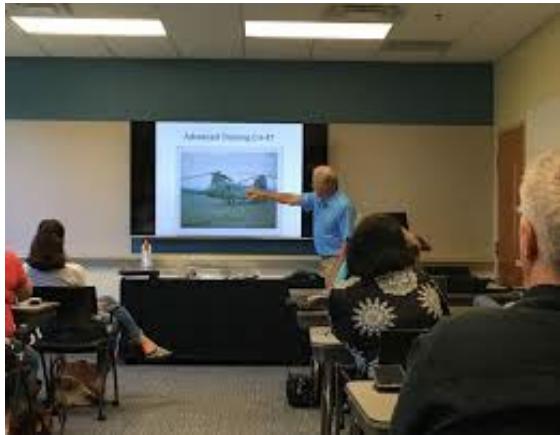
NTC Equipment Display

Additional table space can be provided in the pre-function area outside the main room for directorates to display items, provide handouts, or conduct business hours (as preference directs)

Suggested timeline for the day session:

0800 - 1000	General Assembly	1300-1430	Session II
1015 - 1130	Session I	1430-1500	Break
1130 - 1300	Lunch	1500-1630	Session III

## Learning Sessions/Seminars



Leanring sessions (or seminars, or classes; as you like) provide attendees a chance to do two things: to learn and to interact with wing staff and wing subject matter experts (SMEs) who are leaders within the wing.

We've briefly discussed seminars in the last section. As a reminder however, seminars are by their nature designed to be short: usually 45-50 minutes. Double sessions can last up to 90 minutes but do schedule a short break in the middle to keep everyone fresh.

### What to Schedule

The conference committee should have a plan for what it wants to schedule based on the conference theme, the needs of the membership and the qualified subject matter experts available. A good way to accomplish this is to hold a call for proposals for seminar presentations. A call for proposal is a formal request to host a presentation. It asks for information designed to inform the committee about

- what is to be presented.
- why it is important to the attendees.
- how it fits with the conference theme, and
- specific needs for support (many of which might impact the conference audiovisual budget).

### How to Schedule

Scheduling can best be described as a chess match. In many regions and wings, presenters do more than one seminar, or also must fit in a meeting, and they also need to be a viewer of a seminar that they want to attend. There are also audiovisual, seating or other logistical needs which impact when and where a seminar is scheduled.

Try to schedule seminars with the same types of audiovisual and seating requirements in the same room. In this case, audiovisual requirements prioritize how people are seated. What is meant by this is that if two seminars want streaming and recording for on demand viewing; but one wants theater and the other wants schoolroom, determine if they can both live with the same seating. Why? A/V is expensive; but is usually charged by the day. So, make sure if it is purchased it is used throughout the day.

Another consideration is type or, "tracks". Sometimes tracks of seminars which complement one another present themselves or are consciously planned. If this is the

case, don't overlap them. Ensure that they are scheduled so that the attendee (either F2F or streamed) gets the whole experience.

## Presenting a Learning Session

The presentation itself is guided by the type of presentation, how the room is structured, and the activities contained within. All three should complement each other.

### Presentation Types

For most conferences, there are three presentation types: informal lecture/briefing, a group discussion, or a hands-on activity.

#### INFORMAL LECTURE/BRIEFING

This type is easily familiar to attendees: 1-2 speakers; PowerPoint presentation with or without handouts; primarily a push of information to the attendees and sometimes questions and answer time. While it's the easiest for the presenter to control and is useful for some topics and for larger audiences, it makes for the least amount of interaction between the presenter and attendees as well as between the attendees. When this method is used, a theater or schoolroom floorplan is best.



This method is also conducive to basic web streaming and recording for on demand download.

Good presentations generate questions. When using this method, it's really important to include time at the end for questions and answers. Have 2-3 seed questions to help the audience get warmed up to ask questions. Leave about 15 minutes for questions. If presenting a double session. Have a Q&A period at the end of each segment (before the break, before the final end).

#### GROUP DISCUSSION

The group discussion is an excellent engagement tool and capitalizes on the collective skills and successes of the audience. The presenter controls the discussions, uses audiovisual aids to stimulate and guide the discussion, but allows the attendees themselves to discover their own answers to questions and to share best practices. In this method, a semicircle/auditorium style, U-shape and hollow square work best.

This type of presentation can be taken live if the technology is supplied that can allow remote attendees the chance to also ask and answer questions/participate. It's fairly easy to accomplish, but the presenter should employ a second person to moderate the remote chat feed and funnel questions.



### HANDS-ON ACTIVITIES

This type is more complicated to administer but is the most interactive and the most engaging for the attendees. In this type, the presenter acts more as a coach and leader rather than a speaker, and usually employs helpers to monitor the attendees' progress through the activities.

When doing this type of presentation, ensure that the entire task group can be completed in the time allotted for the seminar. It's better to have more time than task rather than more task than time.

When using this type of presentation, school room table sets, the U-shape table, and 4-6 person tables called "nodes" are the best floorplans to have. The node floorplan is particularly useful with group tasks.

## Production

To ensure that learning sessions meet the conference needs, does what is advertised, is of consistently high quality, and for peace of mind; ask presenters to present their plan, their materials and if used, their audiovisual presentation at least a week in advance of the conference. In this way, the audiovisual can be rehearsed so it will be there and run as scheduled. It can also be pre-stored for later posting to on-demand platforms (unless a live presentation is to be used).

## Risk Management

It's important to conduct a full risk management assessment for the conference. One might not give this step much thought as the venue is responsible for its facilities. This is a mistake.

There are many risk management tools to assist the commander and the conference planning staff to minimize or to mitigate controllable risk. Please consult the risk management tools outlined on the safety pages at <http://www.gocivilairpatrol.com> for more information. Up to date risk management tools are located in the safety pages.

Please don't be fooled by the brevity of this section. Risk management processes and resources are better sourced from CAP's online utilities.

Bring your wing safety team in early. These people include representatives from safety, cadet programs, health services and others. Early preparation saves big, big headaches later.

When does risk management begin? It begins when thinking about the theme, potential sites, activities and schedule for the conference.

## Virtual and Hybrid Conferences

Virtual and hybrid conferencing represents a new and exciting vista of member participation for CAP. These methods extend the conference experience of the wing conference to the online world. In these instances, the F2F experience is either added to or replaced by an online experience.

Until just a few of years ago, the idea of having a hybrid or completely virtual wing conference was considered merely a dream; and the technology was prohibitively expensive or simply did not exist.

Today, the technology not only exists but is readily available and, depending on how one goes about it, at reasonable cost. It holds tremendous potential to not only extend the reach of wing conferences but to also expand the possibilities of what can be shared with the membership. Additional considerations for virtual conferencing can be found in **Attachment 10**.

### Hybrid Conferences

The hybrid conference extends the reach of a preexisting F2F conference to CAP members who may not otherwise be able to come to the live site. Using a mix of pre-recorded, live streaming and on demand content, a hybrid conference gives all attendees the most “bang for the buck”.

Key to this format is the thoughtful planning and access to technology to marry two audiences: the live audience participating at the main site, as well as the audience participating remotely. Live audiences benefit from the in-person experiences and can provide enthusiasm and live reaction to content. Remote attendees share in this experience while providing additional context from which the live attendees benefit.

### Additional Costs

Additional costs for providing a hybrid capability stem from the additional technology to record and transmit live presentations to the remote attendees as well as the provision for prerecorded content and saving and platforming said content for on demand viewing at a later date. Other costs include provisions to allow remote attendees to participate in live question and answer sessions as well as hands-on activities from remote locations.

Depending on the platform used, it can be up to 2.0 times the cost to hold a hybrid conference as it would a traditional F2F conference. These costs are in the form of recording and storing content as well as making the content available to members long term.

However, the costs of providing this content vary widely with the platforms chosen and are really outweighed by the potential for more member participation. Consider: one F2F wing conference in 2019 attracted about 200 members. That same conference using an electronic format garnered almost 3 times the participation, without a F2F component. Imagine what the attendance could be if a hybrid model were used?

## Quality Considerations

Even more than cost, quality of transmission is paramount. Virtual or hybrid attendees are forgiving of mediocre speakers or of content they have seen before. What is not forgivable is poor audio, visual, or streaming quality. Please, please, ensure that streamed and recorded content can be (1) heard, (2) seen, readily downloaded.

## Virtual Conferences

The virtual conference contains all the technology and streamed content of the hybrid conference without the F2F component. This is both a blessing and a curse.

The blessing is that the logistics of holding a F2F conference at a conference venue with food and beverage as well as sleeping accommodation are avoided. This is where the blessing ends because the rooms as well as the F2F are supporting the meat of the conference: the conference content.

Remember that the purpose of the conference isn't the sleeping accommodation or the food, but the content. And that content must be made attractive and inspirational to a remote audience.

Remote conferences differ from F2F conferences in several ways:

- individual segments tend to be shorter to keep attendees interested.
- presentations are more visual.
- audio must be more impactful.
- more breaks between segments are required to keep attendees fresh.
- production is tailored to a broadcast audience, much like newscasts or awards shows.
- segments are designed for remote interaction (polls, Q&A).
- segments are also designed for on demand viewing after initial broadcast and therefore must have less perishable content.

For these reasons, virtual conferences can cost as much as F2F conference, but the cost is directed towards broadcast technology rather than food and beverage.

## Designing Hybrid and Virtual Presentations

Designing a presentation for a hybrid or for a virtual audience is different than designing for a F2F audience. The primary difference is that the presenter cannot rely on nonverbal cues to determine if the presentation is being received well. More care is taken in the design and production phase of the presentation to help the presenter ensure that the intended message is received, and that the audience has ample opportunity to provide feedback.

Presenters must also work to keep the attendee engaged. Always have something for the attendee to view. Simple ways include having more slides but fewer words on each slide, photos, graphics, embedded video, or audio. If a presenter isn't using slides, they can employ a chat or polling function to allow the students to engage and participate.

Care must also be taken to ensure that viewers who do not participate live receive the intended message. What is meant by this is that when a presentation is live there is the opportunity for give-and-take: feedback by the audience and adjustment and response by the presenter. This is not possible with on-demand or after-the-fact content.

### Technologies Available

As of the date of publication, there are dozens of free and for-cost platforms to allow call-in conferencing capability, streaming capability, and interactivity. Just some of these platforms are:

- Zoom
- Go to Meeting/Go to Webinar
- Microsoft Teams
- Google Share
- Facebook Live
- Conference Direct
- Encore (formerly PSAV) On Demand

NOTE: These platforms are offered as examples and are not recommended or endorsed by CAP or any of its affiliates.

These and dozens of others are available to assist the wings to bring a quality conference experience to the most members.

## Summary

This pamphlet is designed to be a guide and a reference to the conference planning officer (CPO). It's designed to be foundation from which the CPO builds their own knowledge base and experience in planning wing conferences and companion events.

As important as anything this guide can explain is the experience of wing conference planners from throughout Civil Air Patrol. Seek them out and ask them a thousand questions. Draw on their experiences to chart an individual path. Record your own experiences from which others can learn. This is the point of the continuity book, the annual conference binders, this pamphlet, and the conversations over cups of coffee. Experience is worthless if not shared.

Remember the three main purposes of holding a conference:

- To connect
- To collaborate
- To celebrate

Also remember the six "magic questions:"

- Why?
- When?
- Who?
- What?
- When?
- How?

**Assemble a good team!** Always ask for help if needed. It's expected.

Budget well.

Manage risk.

**Have fun.** Planning a wing conference is a selfless act of goodwill for your fellow members. Make it the highlight of their year.

Good Luck!

## Attachments

### Attachment 1: Sample Venue Request for Proposal and Description

#### COMPONENTS FOR CONFERENCE

#### REQUEST FOR PROPOSAL

1. CAP Introductory Narrative: a three-paragraph summary of the CAP organization, WING, missions, volunteer membership demographics and a description of why they come to a conference. It is critical to emphasize the volunteer nature of CAP and that members self-fund their conference costs - no government or corporate funding of member registration or travel costs.
2. Contact information: This is the CAP Wing Conference Project Officer
3. Preferred Date: this date represents the preferred days (arrival, main and departure) for the conference. It's a good idea to have 3 alternatives. Hotels will price dependent on the availability of rooms and other events in the area.
4. Alternate date: see above
5. Attendance: A rolling average over three years gives a good estimate. Of course, if there is a special guest, the National Commander or a change of command during the conference the number is also adjusted.
6. Room Block: Room blocks are sorted by number of sleeping rooms (not people) required for each night of the conference and then totaled.
7. Room Requirements (Sleeping Room Requirements): The ratio of king beds versus two-bedded rooms is determined by registration history and attendee demographics. We skew slightly towards two-bedded rooms as many members double up to save money. We also schedule about 3 percent disabled-accessible rooms.
8. Program Requirements by-day: These are reviewed post-conference by the Conference Committee and revised for the next RFP cycle based on the activities selected by the Committee and senior leadership. Where square footage and/or lockable space is specifically identified, the square footage specified represents the minimum requirements for the activity. If a room shares multiple activities (like a grand ballroom), the largest square footage requirement is the one requested.

9. Food and Beverage Requirements: A summary of expected meal plans, menus, schedules and number of people served. Please list by-day in order of service, if known at the time of the RFP.
10. Minimum Food and Beverage Spend: An estimate (realistic but very conservative) of what we will spend before service charge and taxes. This is the dollar amount that counts against our meeting space and concessions (in addition to hotel room nights). It's better to lowball the number of dollars we are willing to spend (for instance state \$11,000 - \$13,000 even if you think you'll spend \$15,000 (before ++) if you know you'll still get the concessions you feel are important because it will give you negotiating room if you either need more space or look like you aren't going to meet your room night minimums.
11. History: the list of previous wing conferences and venues. Shows CAP's commitment to the activity. Can be helpful if you return to the same city often.
12. Other cities being scheduled: Sometimes you reveal this in the RFP, sometimes you don't.
13. Decision Maker: Depends on how the wing comes to a decision.
14. Projected Decision Date: Set by wing senior leadership.
15. Special Concessions: This is CAP's menu of desired amenities and discounts based on your needs. For many conferences, big items include payment terms, 1:40 comps, 80% room occupancy on a cumulative basis (as opposed to per night), right to execute name changes for NHQ-allocated room nights, comped meeting space, comped allocated suites, comped parking passes, and that the members reserving and paying for their own rooms.

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REQUEST FOR PROPOSAL

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**Civil Air Patrol National Conference**

**Sponsored by Civil Air Patrol (CAP)**

Civil Air Patrol, the official U. S. Air Force Auxiliary, is a nonprofit organization of general aviation enthusiasts. CAP's 65,000+ volunteers perform more than 85 percent of inland search and rescue missions in the continental United States and assist emergency planners in times of disaster. CAP volunteers also serve America by developing our nation's youth through CAP's cadet programs and educating citizens on the benefits of the aerospace industry and more specifically Science, Technology, Engineering and Math (STEM) careers, reaching over 300,000 school-age youth annually.

CAP Wheelhouse Wing is the state-level organization and contains approximately 1,100 members: youth and adult. Within Wheelhouse, there are 24 squadrons (akin to a scout troop) in communities throughout the state. This conference is designed to bring our wing's most active members together to learn, to celebrate, and to engage and collaborate.

The average age of CAP adult members is 49 years. This annual meeting, in most cases, is a vacation for members and their families. ***Most members pay their own expenses; therefore, an affordable rate is a major consideration.***

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**Contact:** Lt Col Jane C. Doe, Conference Project Officer  
Civil Air Patrol Wheelhouse Wing  
27 Cessna Drive  
Mt Pleasant, Wheelhouse 30230

Office: (123) 555-1515  
E-mail: jcdoe@whwgcap.fake

**PREFERRED DATE:** 2<sup>nd</sup>, 3rd, or 4<sup>th</sup> weekend of April 2021

**ALTERNATE DATE:** None

**ATTENDANCE:** 175-220

**ROOM BLOCK:**

<u>Thursday</u>	<u>Fri</u>	<u>Sat</u>	<u>Sun</u>
2	90	75	1

**ROOM REQUIREMENTS:** 40% 1 BED; 55% 2 BEDS; (2) SUITES; 3% ACCESSIBLE

**PROGRAM REQUIREMENTS:**

<u>Thursday</u>	1 Admin Rooms/Command Post, ( <i>24 hour hold through Sunday</i> ), rekey
<u>Friday</u>	1 Admin Rooms, ( <i>24 hour hold through Sunday</i> ) Registration Area ( <i>Set-Up</i> ) with secure storage, rekey 2 Breakout for #50 Foyer for Reception
	1 Admin Rooms, ( <i>24 hour hold through Sunday</i> ) Registration with secure storage
	2 Breakouts for #25
	4 Breakouts for #50 2 Breakouts for #40 1 Foyer for Display space 1 Ballroom for General Assembly AM for 250 (theater set with stage and head table) and conversion PM to banquet space for 170 (rounds of 10, stage, no head table)
<u>Sunday</u>	1 Admin Rooms, ( <i>24 hour hold through Sunday</i> ) until 2:00pm 2 Breakouts for #50

**FOOD & BEVERAGE REQUIREMENTS:**

Friday	Evening Reception with cash bar and heavy hors d'ovoures
Saturday	Coffee Breaks for #200, 2 times daily
Saturday	Evening Reception for #170 with cash bar) & Banquet for #170

**MINIMUM FOOD & BEVERAGE:** \$8,500

**HISTORY:**

<u>Month</u>	<u>Year</u>	<u>Location</u>	<u>Hotel</u>
15-17 Apr	2016	Oldtown, WH	Oldtown Resort and Spa
7-9 Apr	2017	San Town, WH	Courtyard Retreat
23-25 March	2018	Othertown, WH	Othertown Hilton Garden Inn
15-17 Feb	2019	Anytown, WH	Anytown Marriott Waterfront

**OTHER CITIES BEING CONSIDERED FOR THIS PROGRAM:** TBD

**DECISION-MAKER:** Selection Committee

**PROJECTED DECISION DATE:** June 2020

**SPECIAL CONCESSIONS:**

- One (1) per forty (40) complimentary sleeping room ratio based on actualized room pick up on a cumulative basis
- Two (3) complimentary one bedroom suites (*Friday/Saturday*)
- Complimentary meeting and vendor space
- Complimentary internet in meeting space & guest rooms
- Guaranteed food and beverage prices
- Six (6) Complimentary parking passes with in/out privileges (*Friday-Sunday*)
- Discounted parking for conference attendees
- Attendees will pay their own room, food/beverage, parking and incidental charges.
- Authorized signor or their agent will be allowed to make name-changes after the cut-off date to previously approved sleeping rooms that are guaranteed to the Master Account.
- 1 Free Safe Deposit Box back of house

Civil Air Patrol utilizes purchase order/electronic funds transfer and/or company check as form of payment for conference F&B, audiovisual and other authorized master account items. Net 30 after issue of final invoice and resolution of disputed charges. CAP and vendor may negotiate a deposit arrangement.

For sleeping rooms with which Civil Air Patrol has reserved and charged to its Master Account (either paying on the Master or assigned as part of the 1:40 comped room night ratio), CAP reserves the right to execute name changes on rooms with which it has reservation confirmation number after the group-reservations cut-off date to the date of arrival. These names can only be changed by the Authorized signor or their agent to someone attending our conference and affiliated with CAP and guaranteed to our Master Account.

This provision is because we work with high-ranking military officials; and there are times when the person originally attending is deployed or re-assigned at the last minute and sends a replacement in their stead.

Attendees will pay their own room, food/beverage, parking and incidental charges. As outlined above, CAP members are volunteers and in fact pay to belong to the organization and serve their communities. This event quite often serves as their summer/family vacation, so affordable room rates are critical to attendance.

## Attachment 2: Sample Table of Contents for Continuity Book

### TABLE OF CONTENTS (TABS)

1. Master Deadline Checklist
  - Pre Conference
  - During Conference
  - Post Conference
2. Request for Proposal
  - Components
  - Sample
3. Site Research
  - Research for Site Finalists
  - Trip Reports
4. Recommendation to Senior Leadership
5. Signed Hotel Venue Contract and process for approval
6. Winning Hotel Information
  - Floorplans
  - Catering Menu
  - A/V Menu (if available)
7. PO, PRs and Credit Card Orders and Processes
8. Steering Committee Minutes/Decision Papers
9. Requests for Learning Labs/Recons
10. Essential Spreadsheets Samples
  - Master Schedule by Event/Day
  - Food and Beverage by Day
  - Audiovisual Spreadsheet
  - Budget Spreadsheets
  - Registration Spreadsheet Reports
11. OPRs for Major Functions
12. Checklists
  - Non-emergency
  - Emergency
13. Master Form Samples
14. Annual Conference Workbook Content List
15. Registration Tab
- 16 Conference Project Officer Checklist and After Action Report Sample

## Attachment 3: Primary Documents Included in Annual Conference Workbook

### PRIMARY ANNUAL DOCUMENTS INCLUDED IN ANNUAL CONFERENCE WORKBOOK

- A. Deadlines and Timelines Summary (order of actions)
- B. Request for Proposal (Conference Project Officer (CPO) managed and updated annually)
- C. Recommendation Paper to Command Team for site selection (CPO created)
- D. Venue contract (including addendums and overflow hotel contacts, if required)
- E. Budget (CPO managed)
- F. Purchase documents
- G. Credit Card Receipts
- H. Food and Beverage spreadsheet
- I. Audiovisual spreadsheet
- J. Quote from audiovisual provider
- K. Banquet Event Orders from hotel
- L. By-day activity spreadsheet
- M. Room assignment spreadsheet
- N. Hotel Floor Plan and square footage
- O. Event Floor plans
  - 1. General session
  - 2. Banquet
  - 3. Exhibit Hall (if used)
  - 4. Historical Display (if used)
  - 5. Seminar Rooms
  - 6. Opening Reception (if used)
  - 7. Command Post
  - 8. Admin Room (if used)
- P. Conference program
- Q. Banquet Program
- R. Annual scripts
- S. Seminar Calls for Proposals
- T. Staff Work assignment spreadsheet
- U. Invitation letters and Thank You letters
- V. Press Releases

- W. Learning Lab and Precon Descriptions (created from Calls for Proposals forms)
- X. Venue resume questionnaire to the hotel
- Y. Conference Committee Document Set
- Z. Catering Menu from hotel
- AA. Key Contact Information
- BB. Dietary Restrictions Spreadsheet by event

## Attachment 4: Essential Checklists (Adapt as Needed)

### Attachment 4A: Hotel Site Survey Areas of Emphasis

**SITE SURVEY CHECKLIST**  
**HOTEL SITE SURVEY AREAS OF EMPHASIS**

1. Security/safety/medical
  - a. Lockability and quality of conference room locks/sleeping room locks
  - b. Lighting in public areas
  - c. Parking structure security, lighting, transit to/from hotel
  - d. Local walking distance from hotel
  - e. How "open to the public" are the conference areas? Is the conference area deep in the hotel or close to public transit points?
  - f. Proximity of the hotel to urgent care/emergency rooms
  - g. Type of security the hotel has (may also be called loss prevention)
  - h. Local crime in the area
  - i. Safety of the fun walk path venue
2. Loading dock and freight elevators
  - a. Access by NHQ members and truck
  - b. distance from conference areas
  - c. freight elevator access from dock to conference storage area
  - d. Allowing NHQ members to move own freight and use own pallet jacks and equipment
  - e. Can our truck be parked on property?
3. Bus loading (are there early morning noise concerns?)
4. Parking
  - a. Outside or parking structure
  - b. Maximum height of parking structure
  - c. Tightness of the parking spaces, cornering and drive paths
  - d. Cost
  - e. Access (ticket? Room key?)
5. Check-in (note how many kiosks and people on duty)
6. Proximity to elevators (if elevator controls are unusual, photograph and document)
7. In-house ATM?
8. In-house rental car kiosk?
9. Social seating areas throughout the hotel
10. Concierge Lounge
  - a. Availability of
  - b. Number of Seats
  - c. Types of food/beverage service offered
  - d. Hours of operation

11. Bars and Restaurants (note seating capacity)
12. Menus (to show variety and price points) Web based menus aren't always up to date
13. Hotel gift shop
14. Fitness Center (note hours of operation)
15. Business Center
16. UPS/FedEx concession
17. Number, sqft and layouts of:
  - a. Ballrooms
  - b. Opening Reception spaces
  - c. Exhibit spaces
  - d. Foyers and gathering places in conference areas
  - e. Elevator, escalator and stair banks in conference venue
  - f. Registration Desk and Registration back of house facilities
  - g. Breakout rooms and hallways (photograph door and electronic signage as well as interiors)
    - i. Pay attention to ones surveyed for secure storage, green room, command post, open houses, "The Hangar", Vanguard and admin)
18. Sleeping room samples (ask to see actual rooms to take real photos)
  - a. Regular room (assess quality)
    - i. Door locks
    - ii. Lighting
    - iii. Cleanliness of room and amenities
    - iv. Overall condition (aged and worn or fresh)
    - v. Stains
    - vi. Bedbugs or other insects
    - vii. Musty smell (could signal mold)
    - viii. Quality of HVAC system
    - ix. Water hot? Water pressure?
    - x. In-Room Amenities
      1. Coffee maker
      2. Refrigerator
      3. Safe
      4. Ironing board/iron
      5. Television
      6. USB ports/plugs
      7. Internet availability and cost
  - b. Presidential Suite (also get floorplan)
  - c. Disabled accessible room
  - d. Distance from sleeping rooms to conference venues

19. Local Area
  - a. Walkability
  - b. Climate
  - c. Crowding
  - d. Parking (other than parking structure)
  - e. Number, variety and price points of restaurants and bars
  - f. Proximity to
    - i. Main airport used by CAP (also see airport site survey checklist)
    - ii. Overflow hotels contracted by CAP
    - iii. Grocery stores/convenience stores
    - iv. Fueling stations (note prices)
    - v. Drug stores
    - vi. Churches
    - vii. Banks/ATMs
    - viii. Urgent care/Medical clinic/Emergency room (also under security)
20. Banquet facilities
  - a. Menus
  - b. Bartender/attendant minimums? Hours and number
  - c. Ability to tailor menus to price points
  - d. Requirements for special needs identification
  - e. Can they accommodate kosher meals
  - f. When final selections required
  - g. When final numbers required
21. Audiovisual
  - a. In-house or contracted
  - b. Is there a hotel service charge on the AV
  - c. Can they accommodate live streaming
  - d. When final floorplans and requirements must be submitted
  - e. Technician hour minimums?
  - f. How billed
22. Hotel signage restrictions
23. Youth-restricted areas in hotel or conference venues
24. Saturday excursion possibilities
25. Local CVB cooperation
26. Restrictions on CAP vehicle size for transportation (like California had)

## Attachment 4B: Photos of Hotel Areas and Amenities

### **SITE SURVEY CHECKLIST**

#### **PHOTOS OF HOTEL AREAS AND AMENITIES**

1. Front Entrance
  - a. Looking into facility
  - b. Inside looking out (side to side and center shots)
2. Lobby view
3. Bus loading
4. Check-in (note how many kiosks and people on duty)
5. Proximity to elevators (if elevator controls are unusual, photograph and document)
6. Social seating areas throughout the hotel
7. Concierge Lounge
8. Bars and Restaurants (note seating capacity)
9. Menus (to show variety and price points) Web based menus aren't always up to date
10. Hotel gift shop
11. Fitness Center (note hours of operation)
12. Business Center
13. UPS/FedEx concession
14. Ballrooms
15. Opening Reception spaces
16. Exhibit spaces
17. Foyers and gathering places in conference areas
18. Elevator, escalator and stair banks
19. Registration Desk and Registration back of house facilities
20. Breakout rooms and hallways (photograph door and electronic signage as well as interiors)
  - a. Pay attention to ones surveyed for secure storage, green room, command post, open houses, "The Hangar", Vanguard and admin)
21. Sleeping room samples (ask to see actual rooms to take real photos)
  - a. Presidential Suite (also get floorplan)
  - b. Regular room
  - c. Disabled accessible room

## Attachment 4C: CAP Property Theft at Venue/Hotel

**EMERGENCY CHECKLIST**

**PROPERTY THEFT AT VENUE/HOTEL**

**A. Before Event**

1. Inventory all equipment (each OPR is responsible for their own inventory. Map:
  - i. Equipment/supplies we send on the truck we drive to the event property
  - ii. Shipped by other means
  - iii. Provided by the host region/wing
2. Each OPR is responsible for the Command and control of the equipment provided.

**B. During Event**

1. Property room(s) will be locked and/or personally manned **at all times**. Access will be restricted to:
  - i. CAP Conference staff.
  - ii. Hotel staff being used to move property but must be escorted by CAP staff.
  - iii. Wing Project officer designated members but must be escorted by CAP staff.
2. Each OPR is responsible for the Command and control of the equipment provided.
3. If theft is suspected:
  - i. Conduct immediate search to confirm. If theft reasonably confirmed, contact:
    - ii. \*Hotel Loss prevention (security)
    - iii. \*Hotel Event Staff
  - iv. Police (must obtain police report for insurance)
  - v. Command Post/Wing CC/CPO /OPR of the equipment stolen (if not already notified)
4. Determine effect of the loss of asset. If the asset is mission critical, determine options for mitigation of impact or on-site replacement.

**C. After event**

1. OPR works with CAP and other concerned departments on recovery plan.
2. Report of Survey completed IAW Logistic regulations.
3. Evaluation is made on how prevent repeating circumstances.

## Attachment 4D: Attendee-Staff Victim of Crime

### ***EMERGENCY CHECKLIST***

#### **ATTENDEE/STAFF VICTIM OF CRIME**

##### **A. Immediate action:**

1. Ensure victim safety.
2. Provide assistance as requested. Determine if victim was physically harmed. If so initiate medical emergency checklist.
3. Notify Command Post and Senior Event Leadership.
4. Suggest that victim inform their commander and that hotel loss prevention be contacted (if crime happened inside the hotel).
5. Police notification is responsibility of the victim if they are conscious and alert.

##### **B. Follow-on action**

1. Allow victim's chain of command to provide support as needed and/or requested.
2. Notify General Counsel for situational awareness.

## Attachment 4E: Medical Emergency/Non-Emergency

**EMERGENCY CHECKLIST**  
**MEDICAL EMERGENCY/NON-EMERGENCY**  
(\* DENOTES ADDITIONAL MEDICAL EMERGENCY CHECKLIST ITEM)

**A. Before Event**

1. Ascertain locations of closest Emergency Room, Urgent Care (IV and X-Rays) and Care Center (flu and band-aids) to the event venue/hotel.
2. Provide list and detailed locations/maps to the Command Post and Wing Transportation Officers and drivers (in the case of medical emergency for the benefit of the command chain and/or family/friend visitation and retrieval of member if released).
3. Ascertain if the wing project staff has a medically-trained member present or if an attendee is medically trained.

**B. If a Medical Event Occurs**

1. **Suggest all falls and impacts to head require immediate medical evaluation.**
2. **Determine if 911 needs to be contacted (err on the side of caution)**
3. Contact:
  - i. Command Post
  - ii. \*Hotel Loss prevention (security)
  - iii. \*Hotel Event Staff
  - iv. Senior CAP Staff
  - v. CPO (if not already notified)
  - vi. \*Attendees' immediate commander and wing commander (in the case of medical emergency also region commander). Consider Chaplain for pastoral care.

**C. After Immediate Emergency Has Passed**

1. Ensure contact is made among victim and CAP Command Chain/Chaplain.
2. Coordinate with wing project officer and victim's command chain to ensure that transport back to hotel is completed if the victim is released during the conference.
3. Provide support as needed if the victim's wing and/or the wing project officer requests it.
4. Complete Required Safety Reporting and Review IAW Safety Regulations

## Attachment 4F: Fire at Event Venue/Hotel

### **EMERGENCY CHECKLIST**

#### **FIRE AT EVENT VENUE/HOTEL**

##### **A. Before Event**

1. Obtain venue/hotel evacuation plan and recommended rally point(s). Decide on rally points to be used. Coordinate with Command Post (CP).
2. Create recall roster for Conference staff onsite and senior event staff (roster controlled by CP).
3. Establish Command, Control and Communications (C<sup>3</sup>) procedures for region and wing commanders present for the attendees in their chain of command.
  - i. Registration e-mails list of attendees' contact info to onsite commanders of attendees.
4. Briefing about procedures to be e-mailed to all attendees pre-registered and hard copy to all attendees at Registration in their bags.
5. Exercise recall roster for conference staff.

##### **B. During Event**

1. Rebrief attendees on procedures.
2. Establish liaison between hotel loss prevention (security), event planner, CPO and Command Post.

##### **C. If Fire Occurs (if alarm is sounded)**

1. Alert Staff and Commanders via text to rally points and head count their people, paying special attention to cadets and people with known disability/mobility issues.
2. Lock areas meant to be secured.
3. CPO checks with event staff/loss prevention as event staff is available.
4. Clear building to designated rally point.
5. Senior officer present coordinates with commanders and directors to consolidate head count. Alerts Command team, First Responders, senior event staff, and hotel of missing people.
  - i. When All-clear is sounded, return to property. If property inaccessible - work with hotel to compose a recovery site. Communicate recovery site location using recall roster.
6. Cadets will be instructed to call their parents at earliest opportunity to say that they are safe.
7. In the event of an attendee injury, the Medical Emergency or Medical Non-Emergency Checklist will be followed as appropriate.

##### **D. If Fire Occurs (and alarm is not sounded)**

1. Pull alarm
2. Alert hotel staff
3. Follow steps C-1 through C-8

## Attachment 4G: Natural Disaster or Power Outage at Venue/Hotel

### EMERGENCY CHECKLIST

#### NATURAL DISASTER OR POWER OUTAGE AT VENUE/HOTEL

##### A. Before Event

1. Obtain venue/hotel action plans and recommended rally point(s)/shelters.
2. Create recall roster for CAP staff onsite and senior event staff (recall roster controlled by Command Post).
3. Establish Command, Control and Communications (C<sup>3</sup>) procedures for region and wing commanders present for the attendees in their chain of command.
  - i. This requires commanders to receive a list of attendees w/contact info to be e-mailed.
4. Briefing about procedures to be e-mailed to all attendees pre-registered and again to all attendees at Registration in their bags.
5. Exercise recall roster for conference staff.

##### B. During Event

1. Rebrief attendees on procedures.
2. Establish liaison between hotel loss prevention (security), event planner, Project Manager and Command Post.

##### C. If Tornado Warning Sounds

1. Alert Staff and Commanders via text to guide attendees to designated shelters and head count people, paying special attention to cadets and people with known disability/mobility issues.
2. Lock areas meant to be secured.
3. CPO checks with event staff/loss prevention as event staff is available.
4. Senior officer present coordinates with commanders and directors to consolidate head count. Alerts Command team, First Responders, senior event staff, and hotel of missing people.
5. When All-clear is sounded, return to event.
  - i. If property is damaged or inaccessible - work with hotel and first responders to compose a recovery site. Communicate recovery site location using recall roster.

##### D. If Tornado/Earthquake Occurs

1. Follow Steps C1-C4 as hotel directs.
2. Evacuate the property if instructed by the hotel or first responders using this process.
  - i. If building evacuates, maintain C<sup>3</sup> over all attendees. Commanders and senior staff will be responsible for their direct reports. Command Post coordinates group communications.
  - ii. Establish organization, command and control at designated recovery site/determined by first responders.

OVER

- iii. Senior Staff/Command Team exercises C<sup>3</sup> over decisions and actions regarding event cancellation and movement of attendees; lodging and feeding and eventual dispersal to home locations.

**E. Power outage**

- 1. Senior Staff/CPO work with the hotel and first responders (if required) to ascertain if power outage is a short- or long-term event. Command team informed.
- 2. If a long-term event:
  - i. CPO stages at Command Post.
  - ii. Command Post uses recall roster to establish C<sup>3</sup> among senior staff and commanders and attendees.
  - iii. Trapped members (elevators, electronic doors, disabled) may self-report trouble to the hotel; if their commander contacts them before they do call, the CC will assist in ensuring the hotel is contacted and responds. The CC will coordinate with the hotel through the Command Post.
  - iv. Command Post communicates hotel instructions for rally points/possible evacuation through their recall roster. If the hotel has a PA system, Command Post will be a back-up method.
  - v. If hotel is evacuated; follow fire Emergency Checklist Steps C2-C7.
  - vi. Cadets will be instructed to call their parents at earliest opportunity to say that they are safe.
  - vii. In the event of an attendee injury, the Medical Emergency or Medical Non-Emergency Checklist will be followed as appropriate.

## Attachment 4H: Region or Wing Conference Planning Checklists

<b>PRECONFERENCE DECISION AND PLANNING TIMELINE (PREFERRED)</b>	
<b>Deadline</b>	<b>Activity</b>
T-18 Months	Theme and Basic Conference Flow Request for Proposal (RFP) Review, Revision and Approval)
T-16 Months	Cities and venues chosen to be sent RFPs
T-15 Months	Proposals received from Conference Direct Vetted If needed, second round sent out
T-14 Months	Initial online research on finalists completed Site surveys for top two finalists completed
T-12 Months	Contract signed Local CAP contact identified
T-12 Months	Initial budget approved
T-9 months	Marquis and Banquet Speakers approved/invited Conference Insurance quoted for potential purchase Event pricing drafted
T-9 Months	Schedule shell completed
T-6 Months	Request for Proposals for Precons and LLs sent out Initial sponsor contacts "Save the Date" announcement
T-6 Months	Detailed budget drafted Logos and graphics shells Proposals for meetings and Seminars sent to Conference Committee
T-4 Months	Meetings and seminars selected Initial website shells completed Create basic spreadsheet shells Narratives for meetings and Seminars Set-ups for General Assemblies and awards sessions Final event pricing set
T-4 Months	Initial Food and Beverage and audiovisual requirements Create menus Confirm Marquis and Banquet speakers Final website built
T-3 Months	Early-Bird registration opens Review floor plans Draft conference materials Send out staff presenter comp requests for OPRS Initial onsite staff list Order SWAG materials
T-45 Days	End early-bird registration/open regular registration Banquet program, Conference Program, Budget review Finalize menus Order ticketing supplies Receive quotes from hotel for A/V
T-30 Days	Finalize pricing for A/V based on need and negotiation Registration reminder to members
T-21 Days	Final registration reminder to members

T-15 Days	End Registration Arrival page on website Schedule of Events on Websites Final room list to the hotel Send 90% solution for F&B, Floorplans and A/V to hotel
Within 48 hours of registration close	Compile list of dietary restrictions by name and by meal Banquet list sort by region including comped banquet seats Send final floorplans, F&B and A/V spreadsheets to hotel Transmit to regions for their seating arrangements All Conf Team meeting

**DURING CONFERENCE ACTION CHECKLIST**

**Assumes Friday Arrival**

DAY	Activity
Friday (On Arrival)	Check-in with Events and Security and receive first keyset and parking passes Command Post Confirm availability of loading dock and freight elevators (if required) Link up with other onsite staff Preconference All-In meeting with Hotel-BEO Review, F&B, Intros, etc Confirm numbers for Opening Reception (give to events) Daily hotel bill review with events
Saturday	Check-in with Events Review events of Day AM Rounds of venues to include Registration Ensure coffee breaks are smooth PM Rounds of venues to include registration Daily review of Bill at 1700 with Events Attend General Assembly if possible Check on Ballroom conversion to banquet floorplan Attend banquet pre-event meeting with Banquet Captain Emcee Events Rep Ensure Cocktail Hour space is ready and ticket watchers are posted Assist with pack-out if needed Ensure all rooms are empty of CAP property Ensure that remaining items that are to be drop-shipped are secure Be available after banquet to answer questions if needed Gather keys to all rooms for turn-in to the event staff
Sunday (Before Departure)	Check-in with Events Turn in keys to event staff or Manager of the Day (MOD) One last walk-through of venues to check for lost personal items

**AFTER CONFERENCE ACTION CHECKLIST**

DAY	Activity
Within 24 Hours of return	Gas and clean corporate vehicle if used and return keys
Not later than 7 days post	Draft thank you letters to hotel and to special guests Calculate CAP's estimate of master bill (F&B, rooms, and A/V)
Not later than 14 days post	Receipt of Hotel master bill All receipts and pending invoices Schedule hot wash of event
Not later than 30 Days post	All invoices reconciled and paid

## Attachment 5: Spreadsheet Samples

### Attachment 5A: Conference Block Schedule Spreadsheet

Room	Layout	Sq Ft	Seats	0800-1000	1000-1030	1030-1130	1130-1300	1300-1400	1415-1515	1530-1630	1800-1845	1900-2130
Eagle/day	Theater w/stage and screen	4000	250	Assembly and Awards	Coffee Break	Seminar	Lunch					Banquet
Eagle/eve	Rounds of 10 w/stage and screen	4000	170									Set up for Banquet
Foyer	Display	2500	None	Displays					Coffee	Set up and Reception (1800)		
Fox	Theater w/ screen	600	25			Seminar		Seminar		Seminar		
Prop	Theater w/ screen	1000	75			Seminar		Seminar		Seminar		
Drake	School w/ screen	800	25			Seminar		Seminar		Seminar		
Wings	U-Shape	600	20	Cadet Advisory Council				Cadet Advisory Council				
Adam	Office	425	5	Command Post and Secure Storage								

This block schedule represents the main conference day. If activities and/or set up occur the day before or the day after, a separate block schedule for each day should be generated. Tip: Excel is a great tool for a simple block schedule file. Simply use one page per day.

This block schedule can be easily adapted for use as a handout to attendees by identifying the seminar/activities in the time blocks and deleting the Layout, sq ft and seats columns.

## Attachment 5B: Conference Room Set-ups by Day (Example is Main Day)

Room Name	Start Time	Set Up Type	Sq Ft	Capacity	A/V Set	Internet	Podium	Mike Type	F&B	Notes
Adam	0600	Office	425	5	n/a	Yes	n/a	n/a	Water station	Easel, Rekey room
Eagle AM session	0600	Theater	4000	350	LCD Support Package and Screen	Yes	Yes	Podium and one hand held	Water Station	Head Table for 10 with center podium on Stage
Eagle PM Banquet	1700	Rounds of 10	4000	170	LCD Support Package and Screen	No	Yes	Podium and one hand held	Banquet Meal, Cash Bar	Center podium on stage (remains from AM)
Foyer through 1600	0600	8 6' tables, dressed	2500		No	Yes	No	No	Coffee breaks	2 chairs per table
Foyer for reception	1800	Bar tops, social seating	2500	170	No	No	No	No	Cash Bar	
Fox	0900	Theater	600	25	LCD Support Package and Screen	Yes	Yes	Podium	Water Station	
Prop	0900	Theater	1000	75	LCD Support Package and Screen	Yes	Yes	Podium	Water Station	
Drake	0900	School set	800	25	LCD Support Package and Screen	Yes	Yes	Podium	Water Station	
Wings	0600	U-shape	600	20	LCD Support Package and Screen	Yes	Yes	Handheld	Water station	

## Attachment 5C: Food and Beverage Spreadsheet (Example is for 1 Day)

Event	Service Time	Service Location	Type Meal	Cost PP before Surcharge and Tax	Cost PP with surcharge and Tax	Number of People	Server/Attendant Fee	Amount toward F&B Min	Total Cost
AM Coffee	0700	Foyer	Break	\$5.50	\$6.88	200	\$0.00	\$1100.00	\$1376.00
PM Coffee	1400	Foyer	Break	\$5.50	\$6.88	200	\$0.00	\$1100.00	\$1376.00
Banquet Cocktail Hour	1800	Foyer	Reception	Cash Bar	Cash Bar	200	\$200.00	\$200.00	\$200.00
Banquet Meal w/ cash bar in room	1900	Eagle	Plated Dinner	\$42.00	\$52.50	170	\$100.00	\$7240.00	\$8925.00
								\$9640.00	\$11877.00

## Attachment 5D: Sample Dietary Restrictions Spreadsheet for Venue

Table Assignment	Dietary Restriction/ Special Meal	Last Name	Notes
1	Gluten Free	Jones	Fruit Plate for dessert
4	Allergic to all nuts	White	
7	Dairy Allergy	Mistletoe	But butter okay
13	Vegetarian	Price	
17	Kosher	Keane	

This list is sent with the meal choice spreadsheet to the hotel to give them adequate preparation time and to work out costs.

The CPO and the banquet captain keep a copy of this list onsite to ensure correct placement.

Note: all those with dietary restrictions should also be given a card that can be passed to the table staff.

## Attachment 6: Sample Banquet Event Order (BEO)

(SAMPLE)  
**EVENT ORDER**  
Oldtown Resort and Spa  
123 Nathan St  
Oldtown, WH 78420

Page# 1 of 1  
Event Order: 20201  
Quote: CAP-20  
Folio: 20-234

FUNCTION DAY/DATE: Saturday, April 10, 2021  
ORGANIZATION: Civil Air Patrol

POST AS: CAP Wheelhouse Wing Conference  
BILLING ADDRESS: CAP Wheelhouse Wing  
27 Cessna Drive  
Mt Pleasant, Wheelhouse 30230  
CUSTOMER: Lt Col Jane C. Doe, CAP  
IN-HOUSE CONTACT: Same  
MANAGER: Ms. Dorothy Street, Sales Manager  
DATE PRINTED: Friday, March 26, 2021

**GUARANTEE OF ATTENDANCE IS REQUIRED 72 HOURS (3 WORKING DAYS) PRIOR TO  
FUNCTION, OTHERWISE THE EXPECTED WILL BECOME THE GUARANTEE. ROOM ASSIGNMENT  
IS SUBJECT TO CHANGE.**

TIME	FUNCTION	LOCATION	ROOM RENTAL	ATTENDANCE EXP	GTD	SET
10:30am – 11:30am	Meeting: Post as: VolU: The New PD Program	Prop		75	75	
1:00pm – 2:00pm	Meeting: Post as: Cadet Physical Fitness	Prop		75	75	
3:30pm – 4:30pm	Meeting: Post as: sUAS and Disaster Relief	Prop		75	75	

**No food or beverage required at this time**

**ROOM SET-UP:** Theater set for 75 with middle aisle  
Standard set at water station: pads, pens, candy and filtered water

**A/V:** Coordinate with audiovisual department

**EVENT SERVICES:** Easel by podium

**Signature:** \_\_\_\_\_

If in agreement, please sign one copy and return

## Attachment 7: Sample Budget

2020 Wheelhouse Wing Conference Budget Based on 200 Attendees			
<b>Variable Costs</b>		<b>Variable Costs Per Person (++ included)</b>	
<b>Item</b>			
Banquet meal (170)	\$	52.50	FOOD AND BEVERAGE: \$ 11,877.00
Coffee Breaks at \$6.88.pp per break (2 breaks)	\$	13.76	REGISTRATION SUPPLIES \$ 170.00
Reception Bar set fees	\$	0.50	BANQUET SUPPLIES \$ 130.00
Banquet Bar set fees	\$	1.00	BANQUET PROGRAM \$ 440.00
<b>Variable cost sub total</b>	\$	<b>67.76</b>	ADMIN ROOM SUPPLIES \$ 100.00
<b>Fixed Costs</b>			VIP AMENITIES \$ 120.00
<b>Item</b>			AWARDS \$ 2,000.00
Registration Supplies	\$	0.85	FUEL \$ 100.00
Banquet Supplies	\$	0.65	BUSINESS CENTER EXPENSE \$ 50.00
Banquet Program	\$	2.20	SUPPORT SUPPLIES \$ 130.00
Admin Room Supplies	\$	0.50	<b>TOTAL</b> \$ 15,117.00
Awards	\$	10.00	
VIP amenities	\$	0.60	
Fuel for corporate van support	\$	0.50	
Business Center Expense	\$	0.25	
Support supplies	\$	0.65	
<b>Fixed cost Subtotal</b>	\$	<b>16.20</b>	
<b>Total PP Cost Conf Proper</b>	\$	<b>83.96</b>	

## Attachment 9: POW/MIA Ceremony

### POW-MIA PRESENTATION TABLE

As you enter the dining room this evening, you may have noticed a small table in a place of honor near our head table. It is set for one. The military caste is filled with symbolism. This table is our way of symbolizing the fact that members of our profession of arms are missing from our midst. They are commonly called, POW/MIA, we call them brothers. They are unable to be with us this evening and so we remember them because of their incarceration.

This table set for one is small, symbolizing the frailty of one prisoner alone against his oppressors. Remember!

The tablecloth is white, symbolizing the purity of their intentions to respond to their country's call to arms. Remember!

The single rose displayed in a vase reminds us of the families and loved ones of our comrades-in-arms who kept the faith awaiting their return. Remember!

The red Ribbon tied so prominently on the vase is reminiscent of the red ribbon worn upon the lapel and breasts of thousands who bear witness to their unyielding determination to demand a proper accounting of our missing. Remember!

A slice of lemon is on the bread plate to remind us of their bitter fate. Remember!

There is salt upon the bread plate symbolic of the families' tears as they wait. Remember!

The glass is inverted, they cannot toast with us this night. Remember!

The chair – the chair is empty – they are not here. Remember!

## Attachment 9: Virtual Conferencing Considerations

This section is going to discuss virtual conferences, typically held via an online webinar or meeting tool. We'll go over differences and additional factors you should consider.

Since technology is always changing at a rapid pace, this pamphlet will not further discuss any particular tool or platform. Rather it will focus on helping you to determine your requirements, which in turn, will help you find the most appropriate tool for the job.

### Signups / Attendance

1. Just like an in-person conference, it's highly recommended to require participants to sign up. This will give you a good idea of the number of participants on the actual day of the event. It will also help you give out attendance credit if needed for the conference. It's also worth considering charging for the event as there are costs which the region or wing may not be able to absorb.
2. Virtual conferences often draw many more attendees than an equivalent in-person conference, due to the increased flexibility of when and where they can attend. If you're allowing outside units, this may be several times your typical number of attendees. You may want to consider having a maximum number of signups since a large number of attendees can prove unmanageable without enough event staff, especially if audience participation is required. Also, almost all meeting tools have a limit on participants.
3. Many conferences can be used as a requirement for CAP's Education and Training, so often attendees want to ensure they receive some type of documentation certifying their attendance. You'll need to determine if keeping track of attendance is required. You may have attendees fill out an electronic form or your meeting tool may include the ability to export a list of participants. If the event is being recorded for later viewing, you may wish to give credit for this as well.

### Scheduling

1. A virtual conference brings you more flexibility. While you can follow a traditional schedule, you also have the option to be more creative. For example, some members, due to work or other obligations, are unable to attend weekend conferences. With a virtual conference, you could easily split it across several evenings to accommodate these members.
2. Breaks are just as important in a virtual conference as in a physical one. Ensure your schedule includes time for meals and breaks between sessions so attendees can get up, stretch, use the restroom, etc. For a more professional appearance, you Intro & break countdown slides/music

3. If you're planning a larger scale conference or allowing attendees from outside units, don't forget to include the time zone, since some of your attendees will likely be from a different time zone.

## Format

1. For each session, you'll need to determine the best way to hold it virtually. The biggest factor is what type of audience interaction do you need or want to allow.
2. Large sessions, such as a general session, that would have been held in an auditorium are typically more one-sided, with a small group of presenters and an audience with minimal interaction. Some tools allow you to limit the audience interaction to virtually raising their hand and asking/answering questions via a text chat. These limitations might be necessary due to the number of attendees.
3. Smaller sessions, such as breakout sessions, usually encourage or require more audience participation. These sessions would be better served by allowing your audience to interact using their audio and video, in addition to the text chat.
4. Depending on the content, you may need to allow your session to breakout to even smaller ad-hoc groups for discussions for a period, then return to the larger group. Some meeting tools allow you to temporarily break a meeting into smaller groups for these scenarios.
5. Some sessions are purely one-sided, with no audience interaction required. These might be better served as a pre-recorded video, rather than using a meeting or webinar tool.

## Presenters / Event Staff

1. Some features in your chosen online meeting tool might not work quite the way you expect them to. Test every feature you plan to use to make sure it operates as expected. Test your people too. Ensure your event staff has all operated the meeting tool and its features in their given capacity.
2. Provide your presenters with presentation templates. National headquarters provides updated presentation templates each year that conform to CAP branding standards, helping ensure professionalism and consistency across your conference.
3. Select some of your event staff to be moderators, they can handle technical tasks/issues with the meeting software, leaving the presenter to focus just on their presentation. Moderators can also deal with conference questions and they can work together to make sure questions are answered the same across the conference.

## Attendees

1. For larger-scale conferences, offer a test or training sessions to give less tech-savvy attendees the chance to test out the meeting software and iron out any issues that might prevent them from attending the event.
2. Establish a list of virtual meeting etiquette and communicate it with your attendees. For example, some attendees might not be aware of how distracting an open microphone can be to other attendees.
3. Not all attendees will have great internet access available to them. Some meeting tools also allow attendees to call in from their telephone if they're having audio issues via the meeting tool.
4. Some potential attendees may not have internet access at all or may have other obligations that prevent them from attending the conference but would still like to review the material discussed. Or attendees may want to review the sessions later or share with other members that did not attend. You can make it easier for these members by recording the sessions and sharing the recordings with attendees so they can watch later.

## Attachment 10: Packing List for Conference Project Officer

1. Program Continuity Book
2. Printer
3. Paper/ink/toner – including heavy paper for creating certificates if needed.
4. Pre-programmed cell phone numbers of all staff, hotel reps, recall lists in own phone and on paper.
5. Set up group text for key staff
6. Shoes one can leave feet in all day
7. Foot care items
8. First aid kit
9. (2) 8 1/2x11 pads
10. Snacks
11. (2) pens
12. Bottled Water
13. Paper handouts for any learning sessions and meetings personally conducting
14. Year-specific Wing Conference Program Binder
15. Thumb drive with files
16. (25) business cards
17. Laptop with MiFi
18. Black Bow Tie, Air Force style necktie and Air Force tie tab for loan
19. Cell-Phone charger
20. Hard copy of
  - i. Hotel Reservation
  - ii. Contact numbers for:
    1. Senior Conference Staff
    2. Hotel Event Planner, toll free number for property
    3. Emergency Rooms, Urgent Care and Minute Clinic centers identified for member medical issues

