

*Society of  
Risk Management  
Consultants*

Helpful Hints for Hosts

## **Introduction**

*Helpful Hints for Hosts* has been prepared to assist those members, their staffs and their families, who have graciously accepted the task of organizing and hosting an SRMC conference. It has been written in the knowledge that most members have never tackled such a task before (and may never want to again afterwards!).

For those who have never hosted a conference before, questions asked of the then President and/or the Meetings chairman should elicit help, since it is most likely that one or the other will have run conferences before.

*Helpful Hints for Hosts*, if followed carefully, will ensure that all aspects of running a conference are covered. However, from time to time, new situations will arise and this guide should be amended accordingly. Please notify the Meetings chairman or the President if you have suggestions regarding adding to or deleting from this guide.

## **General**

SRMC has two basic conferences annually: one in the spring and one in the fall. Both must be educational, although because a number of spouses or guests accompany members to the fall conferences, there is usually a spousal/guest program and more time for leisure activities at the fall conferences.

It has been custom in the past to hold spring conferences over a complete Friday and Saturday morning. Dates to avoid are:

- Easter (mid-March to late April)
- Passover (often close to Easter)
- RIMS (usually last week of April)
- CPCU exams (about the third week of June each year)
- IIA/ARM/CRM exams (about the first week of May)
- Canadian IIA exams (about end of April)

It has been custom in the past to hold fall conferences over a complete Thursday, Friday and Saturday morning. Dates to avoid are:

- Labor Day (Canada & US first Monday in September)
- Rosh Hashanah (usually in September)
- Yom Kippur (eight days later than Rosh Hashanah)
- Canadian Thanksgiving (second Monday in October)
- Columbus Day (second Monday in October)

Boards of Directors' meetings usually precede the conferences by one day. Business Meetings for Members are usually scheduled during one morning's session - *not* Saturday.

It is SRMC policy that each conference should be self-sustaining as far as costs are concerned. The theory is that SRMC funds paid by *all* members should not be used to benefit those *particular* members who attend conferences. However, having said that break-even is best, neither a large profit nor a small loss is unacceptable.

There is a Golden Rule concerning costs in SRMC - absolutely all costs of a conference, within the parameters set out in the previous paragraph, must be included in the registration fee. That means no tipping by members at functions such as tours (tips for bus drivers and tour guides should be paid by the host and expensed); no cash bars; no entrance fees; etc. However, George Bernard Shaw in his “Maxims for Revolutionists” said that, “The Golden Rule is that there are no Golden Rules.” Thus, circumstances will be different from place to place and from tour to tour, generally with respect to liquor. It could well be that the host might deem that, say, a ferry to a particular spot has a bar on it and that it would be up to the individual members to purchase any drinks at their expense.

As a very general guide, prior to the exact number of members and spouses who will attend being known, use the following approximations, based on the average of the last few conferences:

Spring Conference: 35-45 members; 5 spouses/guest

Fall Conference: 45-50 members; 25 spouses/guests

A word about registrations: guests are allowed to attend conference sessions:

- on a “one-time” basis if they can be considered as potential members\*, at full registration fee. If a membership application has not been submitted, a \$50 charge shall be added;
- if they are co-workers of a member and pay the full registration fee;
- spouses may attend functions other than our conference sessions if they pay the appropriate registration fee.

It is becoming a tradition to hold a President’s Reception on Thursday night at the spring conference and on Wednesday night at the fall conference. To accommodate all of the people (members and spouses/guests) at the fall conference probably requires a room larger than the Hospitality suite. The hotel will require that a bartender be provided by it for this event. A good selection of hors d’oeuvres should be provided.

\* *If there is any doubt or concern as to who may attend, clear the name with the President and Executive Committee.*

**18 months to 1 year before**

**Set up a separate account into which all receipts and expenses are recorded. It is better to do it now than when the Treasurer wants it at the conference!**

**Choose Hotel.**

Notes:

- A. Set up on a sheet of paper, the number of guests, number of rooms and approximate size and frequency of use of meeting rooms. Then, armed with the same information, go to several hotels and get quotes. You will be surprised how they will vary. SRMC frequently uses the Marriott chain, but we have also used Sheraton, Doubletree and Hilton. One advantage of using one of the larger chains is that they can access our records on a centralized computer and know how many room nights we have had and how much we have spent for all of our conferences over the past several years. Other hotels can access these records, but only if they are paying for the rights in the first place. All this past information helps the host estimate the number of rooms to pre-book, but even more important, it gives us immediate credibility with the hotel.
- B. In order to obtain free meeting rooms and hospitality suite, it is necessary to have a certain number of room nights booked and used. Some hotels will waive their requirements slightly, but others will not give an inch. Thus, make sure that the number of room nights estimated is actually achieved by insisting that members stay at the conference hotel. Many members stay over Saturday night to get better air fares and some hotels will accept these as contributing toward their requirement of room nights. Similarly, early arrivals may be a negotiating point. All of this emphasizes that the host must make these arrangements early so that the information can be conveyed to the members prior to registration, preferably for the first mailing. Make sure that the hotel uses aggregate room nights toward satisfaction of the requirements. Also, try to negotiate free guest rooms based upon achieving a certain number of room nights in the aggregate,
- C. For spring conferences, as they are shorter than the fall, it is frequently better to use a hotel close to the airport.
- D. Resort hotels are not generally a good choice for SRMC conferences unless they are reasonably close to downtown life. Exceptions to this would be if going to Bermuda of Hawaii or some such similar site.

## **Notify President and Meetings chairman.**

Notes:

- A. Arrange with the President for signing authority to sign hotel contracts and various hotel charges that will come up during the conference.
- B. Arrange with the Treasurer that you will pay whatever initial costs are involved directly to the hotel and then get immediate recompense from the Treasurer; or arrange with the hotel that all payments will have to be billed to the Treasurer for payment.
- C. Ensure all registration checks are sent immediately to the Treasurer.

## **Do short write-up for *Journal*, describing hotel and local sites of interest.**

The publishing of the write-up may well be only ten or so months before the conference. However, send it in as early as this allows for the editor to include it in any *Journal* around a year prior to the conference.

**1 year to 6 months before**

**Check with Meetings Chair that educational program and proposed speakers have been firmed up (notes A through I apply to the host only if the Meetings Chair delegates the educational program responsibility to the host).**

Notes:

- A. The hosting member is to organize the arrangements for the conference coordinating arrangements with the Meetings Committee. **The Meetings Chair will plan the educational program, with input from and coordination with the host.**
- B. Use SRMC members whenever possible, but do not ignore the possibility of specialists outside the SRMC. It is SRMC policy *not* to use brokers unless there are good and valid reasons. Insurance company personnel are a good source of outside speakers. If you do not know the speaker and no member can give references, consider:
1. Has the speaker ever heard of SRMC or even of Risk Management?
  2. How does the speaker sound on the phone?
  3. How much experience has the speaker had?
  4. Does he know his subject deeply enough to interest our group?
  5. Is he well known and/or does he come with good qualifications? (A well known name can attract attendees as can great qualifications.)

Note: Do not feel embarrassed at prying the answers out of the speaker. The success of your conference is far more important than the fear of hurting the speaker's feelings. Besides, a person who does a lot of speaking will be used to such inquiries.

- C. It is SRMC policy not to pay speakers, since they are expected to come simply for the honor (??) of addressing SRMC or, more realistically, because our collective clients represent a very significant buying power. On very rare occasions, travel

expenses and/or honorariums for outside speakers may be paid, but never for member participants. Any payments must be confirmed first with the President and the Meetings chairman. It is essential to confirm these arrangements with the speakers when first contacting them. (We have learned from bitter and expensive experience in the past that unless this is understood up front, it can cost a lot of dollars later.)

D. If an outside speaker is coming:

1. Invite the speaker to all open sessions on the day of their presentation. Speakers may be invited to one evening function at the cost of SRMC. This will be the evening prior to the speaker's presentation or the evening of the day of the presentation.
2. Ascertain how many nights he or she will require a room at the hotel. Reserve a room for the appropriate time, but tell the speaker only that is has been reserved in his or her name and that he or she can settle the room account at the end of their stay. (This emphasizes that SRMC is not paying for the room, unless, of course, you have agreed to pay for it.)
3. Offer to have the speaker picked up at the airport. If not being met, place a basket of fruit in the hotel room.
4. Ensure that someone meets the speaker and, for example, introduces him or her to the members at the breakfast table.
5. After presentation, thank the speaker and present a small gift. (A value of \$25.000 would usually be more than ample.)
6. Offer transportation to the airport.

Notes:

1. Generally ensure the speaker is not ignored any ANY point in time and make him or her feel at home.
2. These arrangements need not be made for a member speaker as the member will be registering in the same way as other members.

E. Tell the speakers that a biographical sketch must be sent by return mail (so that copies can be sent out with one of the early mailings, thereby allowing members to assess the quality of the speakers and whether they are prepared to pay to come and listen) and a draft of the speech must be prepared and set to the Meetings Chair in accordance with his/her policy (usually at least).



- F. Speakers should be told to bring handouts.
- G. Obtain speakers' requirements with respect to audio-visual aids and any particularly seating arrangement in the room (e.g. auditorium format; classroom format; round table; etc.)
- H. Send a letter of confirmation to each speaker, setting out the exact time and any arrangements you have made with him and/or the hotel. Be precise.
- I. Allow some time for pure leisure. For instance, you may plan the program with a 7:00 a.m. breakfast with meetings starting at 7:45 a.m. and running virtually straight through until 1:30 p.m., thereby allowing free time in the afternoon. However, the Internal Revenue Service in the USA does set a minimum of time, which we believe is about 5½ hours of working sessions (E&OE). This free time is not essential for the spring conference.

**For a fall conference, consider an afternoon/evening tour.**

Notes: Registration Notices will provide the host with the number of members who wish to go on the tour, but at this time when making initial arrangements with the bus or other transportation operators, use a figure of approximately 90 people, including spouses/guests. This can be of an educational type, such as in Salt Lake City where a ski area and former silver mine were visited, or Williamsburg, where Bush Gardens was both interesting and entertaining, or a cultural or entertaining type of tour. It may take all afternoon and continue into the evening or it may take just the evening. If this is the case, then remember that clothing must be appropriate for both events as there will be no chance to change.

**For a fall conference, finalize spousal/guest program.**

Note: Spousal/guest programs usually take in an all-day excursion on the Thursday from about 9:00 a.m. till 4:00 p.m., including lunch, and getting back to the hotel in time to titivate themselves.

**For a fall conference, arrange for a dinner dance or entertainment on the Friday evening.**

Notes:

- A. This can be in the conference hotel or outside; it can be semi-formal or casual. Bear in mind, however, that quite a few of the women like to dress up, not down, for this occasion. However, if a really good jeans and sweater event can be lined up, make sure that all are notified at the time of the main mailing.
- B. SRMC members are not real nighthawks (except for a known few), so evening entertainment should end at some time between 11:00 p.m. and midnight. Depending on how many are going to the event, you might arrange for some to leave an hour before the remainder (there are usually at least half a busload who like to leave early).

**NOTE:** We will need a President's reception for Thursday evening in the spring and Wednesday evening in the fall. Suggested time would be from 6:00 p.m. - 7:30 or 8:00 p.m.

**Determine registration fees for members, non-members and spouses, setting a deadline by which the registration and basic fee must be remitted and showing a discount for early registration.**

Notes:

- A. The deadline for basic registration fees should be at least one month prior to the conference. Some hotels may require even longer.
- B. Fees must take into account the following:
- President's Reception
  - Cost of President's room, if not complementary
  - Hotel breakfasts
  - Hotel lunches
  - Hotel coffee breaks (it is good practice, if possible, to have coffee on hand at all times)
  - Cost of hospitality suite, if not complementary
  - Cost of stocking the hospitality suite (see Appendix "2" *Meals and Supplies*)
  - Cost of evening program and entertainment
  - Audio-visual aids
  - Tape or video recordings (if any)
  - Tips for hotel staff (unfortunately most hotels will quote the cost of certain items, but will omit to mention the fact that a 16% [or more] gratuity is not included and will be added along with any state or provincial taxes, so *caveat emptor*)
  - Tips for bus drivers
  - Gifts for speakers
  - Gifts for members and spouses/guests
  - Name tags for members/speakers/spouses/guests
  - Cost of meeting planners and administrative assistance
  - Binders, printing and assembly of conference materials
- C. See Appendix "1" for example of a *Registration Form*

**Get three (more, if more than three mailings planned) sets of labels from the Secretary.**

Note: It is usual to send out a preliminary notice about seven or eight months ahead of the conference; a second major mailing about three months ahead (see below for contents of this mailing); and a final reminder and “chaser” a couple of weeks before the conference. The SRMC Web should be used regularly, as well. It is also suggested that phone calls be made to members who have not registered, two months before the conference.

**Obtain registration cards from hotel.**

Note: Hotel registrations are returned directly to the hotel. In order to establish an accurate count of registrants, as some people register first with the hotel and second with the host, or vice versa, it is necessary to run a continuous cross-reference with the hotel records.

**Send out preliminary mailing about seven or eight months before the conference.**

Note: This mailing is optional, but advisable, and should simply set out the location and hotel name, dates, and perhaps a small brochure of the city or hotel.

**SRMC**

**4 months**

**4 months before**

Beg, borrow or steal giveaways and souvenirs from various sources (we have found clients to be excellent sources) or order them, if necessary.

Check with Meetings Chair to finalize the program.

**3 months before**

**Go to the hotel and confirm everything. Sit down with the catering and banquet managers (presumably these are the persons with whom you have been dealing) and go over registrations, meeting rooms, meals and coffee breaks.**

Notes:

- A. The hotel will try to get you to use their liquor and bartender for the hospitality suite. Try to get the hotel to agree that we will supply and run our own hospitality suite. Usually, after a strenuous knockdown fight they will at least agree to turn a blind eye to what we bring in. However, they may *not* list the room as a hospitality suite, so members have to have good notice of where it is. An alternative is that the hotel will provide hot and cold hors d'oeuvres on the first evening, but these are *very* expensive. Ice may also be a problem unless room service is used as some hotels do not have ice machines, so it may be necessary to bring in ice as well as drinks and yummys.
- B. Hospitality suite is usually a small suite or room off a suite suitable for a small reception of some two dozen people. It is a place for those who wish to meet others and arrange dinner dates and should be open after the after sessions until, say, 8:00 p.m. It should be open on the night before the Meeting of Directors as many arrive during the afternoon and need somewhere to meet others and arrange for dinner or just getting together. It is optional whether it is open late at night, after dinner, but it is frequently. It should be open briefly at the end of the Saturday session for those who are staying over, but only if checkout is 1:00 p.m. or later as arranged. In other words, do not pay any extra day for the room. At some conferences, the hospitality suite was open all day and met with rave reviews from the spouses/guests who found somewhere to go and get together before taking off sightseeing or shopping.
- C. Suggested stock for the hospitality suite is shown on Appendix "2".
- D. The President is entitled to the suite the hotel usually throws in for free, or, if there is no free suite, then the conference must pay the cost of a room for the President. However, as one of the rooms in the hospitality suite frequently is a bedroom, some presidents opt for what could be this noisy room. If the President

declines this and the conference pays for a separate room, it would be quite in order for the host to use it. This makes it more convenient for opening and closing the hospitality suite. However, it should be remembered that the president has first choice.

### **Send out major mailing.**

Note: This mailing should go to all members, prospective members (obtain names from membership chairman), and speakers and should include:

- Detailed program of conference
- Spousal/guest program
- Conference registration notices (to be returned to host)
- Ascertain by adding to conference registration or some other appropriate way who will be attending tours and any dietary preferences or needs
- Hotel registration cards (to be returned to hotel)
- City stuffers
- Other BUMPPF; and
- Biographies of speakers

**SRMC**

**4 months**

**2 months before**

**Obtain name tags.**

Notes:

- A. Those which hang around the neck on a cord are thought to be best. Those with pins sometimes leave marks on suits and dresses, as do those with sticky backs.
- B. Use different colors for members, new members (so that other members will speak to them and make them welcome), guests and speakers.
- C. Make phone calls to members to seek additional registrations, if at all possible.

**If host is arranging for the speakers, chase up those speakers who have not yet submitted a draft of their address.**



**1 month before**

**Don't panic yet!**

**Get your last reminder and “chaser” mailing ready and get it mailed two to three weeks before the conference. Remember, there will always be those who register late. At least one will register at the conference itself every time.**

**For a fall conference, ensure that the President Elect has bought a gift for the retiring President (this is part of the president elect's duties).**

Notes:

- A. The gift should be in the \$200 to \$250 range. For ideas, someone could check with his or her spouse or office staff, but such things as neat “different” electric clocks, chess sets (if he or she plays chess) and so on can be considered.
- B. The cost of the President's gift is **NOT** to be calculated into the conference budget. It is to be paid for out of general funds and the President Elect will be reimbursed at the conference by the treasurer. The President Elect may ask the host to purchase the gift simply to obviate the necessity of someone having to bring it by air from another city and, perhaps, to add a little local color. Check with the President Elect concerning his/her wishes.

**Buy small gifts for speakers, other than members.**

**SRMC**

**1 month**

For any conference at which it is known that a member is retiring from his or her firm (because of age or infirmity, not to go to another firm) and it is expected that this could be the last conference which the member may attend, buy a little something. Be guided by the President or others who have known what contribution the member has made to SRMC and possibly its predecessor, ICS and IRMC. The member may be a person who should be honored with a Life Membership, so this should be run past the President and the executive committee.

**SRMC**

**2 weeks**

## **2 weeks before**

**Sit down again with the hotel and double-check that everything they have on order is what you wanted and at the prices quoted.**

Note: You will not normally have any problems at this point in time, as the hotel banquet staff are usually pretty accurate in their logistics, but it has happened that things were not quite right, particularly if the number of estimated registrants has changed significantly.

**Check out any dietary requirements of attendees will be attended to at hotel and tour meals.**

**Obtain all conference program materials from speakers or Meetings Committee Chair and have conference binders prepared for distribution at the conference.**

**Have name tags printed and assembled for distribution at the conference.**

### **At the Conference**

- **Have hotel put on its notice board precisely where the meeting is and ensure it is under the name or initials of SRMC, not the host's name and not as management consultants.**
- **Ensure that those who are to be voted in as new members are introduced at the very beginning of the session.**
- **Have spare registration kits available.**
- **Prepare list of attendees so that all registrants get them first thing on the first morning of the conference.**
- **Ensure that all has been done for any outside speakers.**

## After the Conference

**Have a drink!**

**Settle up with the treasurer.**

**Prepare a final budget.**

Note: You may not be able to do this until bills have been paid. Bus companies are notoriously late at billing and getting receipts out. Hotels may be a couple of days before all costs are known exactly. Don't worry, but *get it done as soon as possible*.

**Whoever prepared the program and arranged for speakers should write and thank them for their presentations.**

**Have another drink on all of us! Take home what's left in the bottles.  
You did a great job!**

SRMC

Appendix "1"

**Conference Registration  
October 12-15, 200\_**

Name:  Mr. \_\_\_\_\_  
 Mrs. \_\_\_\_\_  
 Ms. \_\_\_\_\_

Company: \_\_\_\_\_

Address:  Business  Home  
\_\_\_\_\_  
*Street* *Apt/Suite*  
\_\_\_\_\_  
*City* *State/Province/Zip Code*  
\_\_\_\_\_  
*Phone*

Enclosed is:  US \$425 - Conference Attendee (\$400 if paid before August 1)  
 US \$650 - Attendee and Spouse/Guest (\$615 if paid before August 1)  
 US \$425 - Invitee, Prospective Member or Visitor from Member's Office  
(\$475 if membership application fee not submitted previously)

Please make checks payable to SRMC.

Name Tags: \_\_\_\_\_  
Attendee Spouse/Guest

Will you be attending the Wednesday Board of Directors Meeting lunch?

Yes  No

Will your spouse/guest be joining us for breakfast?

Yes  No

Will your spouse/guest be joint us for lunch on Friday, October 14?

Yes  No

Do you have any special dietary requirements? (e.g. vegetarian or kosher). Please specify:

Please mail to: *[Conference Host]*

**Please return by September 15, 200\_**

## Meals & Supplies

The following is only a guide and, of course, will vary from conference to conference.

### **Breakfasts:**

- Meeting of Directors
- Each morning of the conference

- ◇ **Content, always:**

- Orange and grapefruit juices
  - Assorted cereals
  - Fruit
  - Muffins

- ◇ **Content, sometimes:**

- Full cooked breakfasts

### **Coffee Breaks:**

- Every morning and afternoon
- It is appreciated by many if the coffee is available at all times.

- ◇ **Content, always:**

- Regular coffee; decaffeinated coffee; hot tea

- ◇ **Content, sometimes including:**

- Various juices
  - Assorted soft drinks

### **Lunches:**

- Meeting of Directors
- Each day of the conference except the last half-day (usually Saturday)

◇ **Content:**

Meeting of Directors usually soup and make your own sandwich with cold cuts and, perhaps, a salad or two.

Other lunches are sometimes buffet-style, sometimes sit-down, usually with a dessert.

**Dinners:**

- Meeting of Directors always on your own.
- Fall Thursday meeting usually on your own.
- Fall Friday meeting usually organized: dinner dance, wild west night, boat cruise, etc.
- Spring Friday meeting sometimes organized; sometimes not organized.

**President's Reception:**

- Spring Thursday evening, not a big deal, maybe 6:00 p.m. to 7:30 p.m., usually just drinks in the hospitality suite.
- Fall Wednesday evening, maybe 6:00 p.m. to 8:00 p.m., a bigger deal with hors d'oeuvres, hot and cold.

Note: If using hotel services, negotiate with hotel to acquire unused liquor as basis for hospitality suite.

**Hospitality Suite:**

- **Hours:**
  - ◇ If feasible, evening prior to Meeting of Directors, so those coming in have somewhere to meet and arrange for dinner.
  - ◇ Every day after afternoon meetings and sessions from, say, 5:00 p.m. to 8:00 p.m. and again, say, 10:00 p.m. until midnight.
- **Content, always:**
  - Beer, estimate 1 beer/attendee every two days (include Coors & Coors Lite)
  - White wine (estimate 4 liters for fall session; 3 for spring session)
  - Red wine (estimate 5 liters for fall session; 4 for spring session)
  - White rum .75 liters
  - Gin (Tangueray) .75 liters
  - Scotch (Ballantine's) .75 liters
  - Bourbon (Jim Beam, Wild Turkey, or Makers Mark) .75 liters
  - Rye (Canadian Club) .75 liters



Vodka (Absolut) 1.75 liters  
Sweet Vermouth  
Dry Vermouth

Mixes: Ginger Ale; Classic & Diet Coke; 7-UP or some other lemon/lime drink; lots of orange juice (preferably fresh, but not if too expensive); tonic water; soda water; 6 small (10 oz.) cans of Perrier or other sparkling (carbonated) mineral water; lots of tomato and/or clamato juice.

Olives, sliced limes and lemons, stemmed maraschino cherries  
Lots of ice

Munchies: Chips and dip; vegetables and dip; peanuts/mixed nuts; pretzels; a few hors d'oeuvres (it is not necessary to have them every night; it is not necessary to have hot ones; it is not necessary to have them after the President's Reception).

## Conference Checklist 18 months to 1 year before

- Set dates of conference.
- Set up a separate account into which all receipts and expenses are recorded. It is better to do it now than when the Treasurer wants it at the conference.
- Choose hotel.
- Notify President and Meetings Chair.
- Arrange with the President for signing authority to sign hotel contracts and various hotel charges that will come up during the conference.
- Arrange with the Treasurer that you will pay whatever initial costs are involved directly to the hotel and then get immediate recompense from the Treasurer; or arrange with the hotel that all payments will have to be billed to the Treasurer for payment.
- Ensure all registration checks are sent immediately to the treasurer.
- Do short write-up for *Journal*, describing hotel and local sites of interest.

## 1 year to 6 months before

- Coordinate with Meetings Chair to firm up program and proposed speakers.
- Coordinate with Meetings Chair to firm up any proposed luncheon speakers.
- If host **arranging education program, pay particular attention** to what agreement or any other arrangements we have with any outside speaker (12 months).
- If host arranging education program, get biographical sketch from all speakers.
- If host arranging education program, obtain speakers' requirements with respect to audi-visual aids and seating arrangements for the presentation.
- If host arranging education program, send a letter of confirmation to each speaker, setting out the exact time and any arrangements you may have with him and/or hotel.
- For a fall conference, arrange President's Reception.
- For a fall conference, arrange an afternoon tour.
- For a fall conference, finalize spousal program, if any.
- For a fall conference, arrange for a dinner dance or entertainment on the Friday evening.
- Determine registration fees (12 months, paragraphs A & B)
- Get three (more, if more than three mailings planned) sets of labels from the Secretary.
- Obtain registration cards for hotel.
- Send out optional preliminary mailing about eight or seven months before the conference.

## **4 months before**

- Beg, borrow or steal giveaways and souvenirs from various sources.
- Finalize program

## **3 months before**

- Go to the hotel and confirm everything – meals, accommodations, President’s room, hospitality suite, etc.
- Send out major mailing, including conference registration, hotel registration, bumpff, etc.

## **2 month before**

- Obtain name tags.
- Chase up those speakers who have not yet submitted a draft of their address.

## **1 month before**

- Don’t panic yet!
- Get your last reminder and “chaser” mailing out.
- For a fall conference, ensure President Elect has arranged gift for the retiring President.
- Buy small gifts for speakers other than members.
- For any conference at which it is known that a member is retiring from his or her firm (because of age or infirmity, not to go to another firm), and it is expected that this could be the last conference which the member may attend, buy a little something. Be guided by the President or others who have known what contribution the member has made to SRMC and possibly its predecessor, ICS and IRMC. You might suggest to the President that the person be considered for life membership.

## **2 weeks before**

- Sit down again with the hotel and double-check that everything they have on order is what you wanted and at the prices quoted.
- Double-check any dietary requirements for hotel and tour meals.

## **At the Conference**

- Have hotel put on bulletin board precisely where the meeting is under SRMC. Try to get hospitality suite listed also (may not be possible if we are running it ourselves).
- Print names for name tags in large type or use “enlargement” feature on photocopier.
- Ensure that those who are to be voted in as new members are introduced at the very beginning of the session.
- Have spare registration kits available.
- Prepare list of attendees so that all registrants get them first thing on the first morning of the conference.
- Ensure that all has been done for any outside speaker.

## **After the Conference**

- Settle up with the Treasurer.
- Prepare a final budget.
- Whoever prepared the program and arranged for speakers should write and thank them for their presentations - even if they are members and did a lousy job!