

CHAPTER TASK LIST

Taken from the Convention Planning Worksheet, approved by the OCTA Board of Directors, March 2018, with minor modifications and additions.

CONVENTION PLANNING STAGE

AUCTION & RAFFLE

- Receive Silent Auction form from National
- Solicit and acquire items for auction and raffle sales
- Coordinate with National for Auction space required
- Bring any auction or raffle items to convention
- Print Silent Auction forms as needed
- Complete Silent Auction forms for items

COMMUNICATIONS

- Review Communications contact list from National
- Investigate additional local entities for publicizing the convention
- Send information for additional entities to National
- Publicize convention on Chapter website and via emails to Chapter membership
- Publicize convention on local media activity websites

CONVENTION LEADERSHIP

- Participate in regular meetings with National and OCTA Management to review progress, upcoming tasks, and issues
- Conduct regular meetings with chapter convention team members to review progress, upcoming tasks, and issues

ENTERTAINMENT

- Review Entertainment contact list from National
- Investigate additional local entertainment options
- Send information for additional entertainment options to National
- Determine preferred entertainment options
- Send recommendations for entertainment to National
- Contact desired entertainers and arrange for performance at convention

EXHIBITORS & SALES ROOMS

- Review Book Exhibitor contact list from National
- Investigate additional local authors, publishers, and book sellers
- Send information for additional local authors, publishers, and book sellers to National

FACILITIES

- Review Facilities contact list received from National
- Investigate possible facilities and hotels in the desired area
- Send additional facilities information to National
- Send facilities recommendations to National
- Host National on facility site visit

FINANCE

- Review Budget Workbook template
- Create budget workbook for the convention
- Send budget workbook to National for review
- Pay suppliers of items to be sold
- Deposit sales proceeds in Chapter bank accounts

HOTELS

- Investigate primary and secondary hotels
- Send hotels information to National
- Investigate local RV parks
- Send RV parks information to National

MEALS & DRINKS

- Coordinate meal menus with National

MERCHANDISE SALES

- Review log of previous convention sales to help identify items and quantities needed
- Design and purchase items for sale
- Market and sell the items

PROGRAMS & SPEAKERS

- Review Programs and Speakers contact list from National
- Investigate and review local and regional speakers
- Send list of additional speakers to National
- Send speaker and program recommendations to National
- Coordinate with National on speaker compensation

PUBLICATIONS

- Review templates for all materials
- Coordinate with National on the development of deadlines for all printed materials
- Develop Chapter local portions of registration materials
- Develop Chapter local portions of convention booklet
- Develop tour guide booklets
- Develop foldable schedule

- Send digital versions of materials in PDF format to National prior to established deadlines for publication

REGISTRATION

- Receive registration materials from National
- Review and proof registration materials set up online

RISK MANAGEMENT

- Review risk guidelines document with all tour leaders and assistants
- Receive Risk Management template from National
- Develop an emergency contact list of all local and state police and sheriffs, hospitals, and emergency care centers in the area of the convention and bus tours, including phone numbers, addresses, and maps
- Create Risk Management document from template and local information
- Review Risk Management document with all tour leaders and assistants
- Include Risk Management document in tour leader books

SPONSORS

- Review Sponsor contact list from National
- Review sponsor request letter template from National
- Review Grant contact list from National
- Develop custom letter for convention sponsorship
- Identify potential local sponsors
- Identify local grants which may be available
- Send updates to Sponsor contact list to National
- Send updates to Grant contact list to National
- Send custom letter for convention sponsorship to National for review
- Send custom letter for convention sponsorship to potential local sponsors or contact in person, by phone, or by email
- Submit grant requests to local grant providers

- Send sponsorship request results to National
- Send grant request results to National

TOURS

- Define tour routes
- Send tour routes and bus requirements to national
- Create tour guides with driving directions, maps, schedules and historical information
- Send tour guides to National for printing
- Train leaders and assistants on the tour routes and history
- Mark the trails along the tour routes
- Arrange for chase vehicles to follow buses
- Solicit ice chests, tubs, or other devices to store box lunches, drinks, and snacks for tours
- Obtain drinks, snacks, and other items for bus tours
- Prepare signs and other devices to guide tour participants to the correct bus
- Receive lists of tour participants and lunch preferences to the chapter

TRANSPORTATION

- Send bus requirements to National
- Review recommended transportation company with National
- Receive transportation company emergency contact information from National

VOLUNTEERS

- Review the volunteer task list
- Send list of additional volunteer tasks to National
- Identify local and area organizations which may be sources of volunteers
- Contact local and area organizations, publicize the convention, and solicit volunteers
- Create list of volunteers and their assignments

CONVENTION EXECUTION STAGE

AUCTION & RAFFLE

- Set up Auction room
- Set up Raffle items display
- Sell raffle tickets
- Staff Auction room
- Staff Raffle room
- Give proceeds of Auction and Raffle sales to National

COMMUNICATIONS

- Update any Facebook or other social media posts for the convention

CONVENTION LEADERSHIP

- Coordinate with National as issues arise

ENTERTAINMENT

- Assist with coordination and setup of entertainment

EXHIBITORS & SALES ROOMS

- Assist with setup of Auction room, Raffle room, and Book room
- Assist with monitoring Book room
- Assist with coordinating setup of authors for Author's Night Reception

FACILITIES

- Assist with monitoring facility execution and issues as they arise

- Assist with the set up of beer and wine for receptions if not handled by the Facility
- Assist with take down, cleanup, and removal of beer and wine for receptions if not handled by the Facility

FINANCE

- Give raffle and sales proceeds to National

MEALS & DRINKS

- Provide staffing to verify meal purchases at all food lines
- Assist with distribution of specialty meals

MERCHANDISE SALES

- Market and sell the items

PROGRAMS & SPEAKERS

- Greet speakers when they arrive
- Introduce speakers to the audience

PUBLICATIONS

- Add convention booklets, tour guide booklets, and schedules to attendee materials as needed
- Arrange for sales of convention booklets and tour guide booklets during the convention

REGISTRATION

- Assist with putting attendee registration materials together

- Staff registration table to check in attendees

RISK MANAGEMENT

- Ensure first aid kits are available on all buses
- Ensure all tour guides (people) have the local contact list on the bus tours

SPONSORS

- Thank sponsors during meetings or announcements during the convention

TOURS

- Receive ice chests from National and store in facility
- Receive bus tour participant lists with lunch preferences from National
- Separate box lunches by type for each bus
- Load ice chests with ice, box lunches, drinks, snacks, and other supplies onto buses
- Set up signs guiding participants to the correct bus
- Assist participants with finding the correct bus
- Check in participants on each bus
- Lead bus tours
- Unload buses upon return

TRANSPORTATION

- Coordinate parking and loading of buses

VOLUNTEERS

- Coordinate volunteers and their assignments

POST CONVENTION STAGE

AUCTION & RAFFLE

- Give any leftover auction and raffle items to National

COMMUNICATIONS

- Update any Facebook or other social media posts about the convention

CONVENTION LEADERSHIP

- Participate in a “Lessons Learned” meeting with National and OCTA Management
- Thank all members for their assistance

ENTERTAINMENT

- Send thank you letters to entertainers

EXHIBITORS & SALES ROOMS

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FACILITIES

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FINANCE

- Receive Chapter share of auction and raffle sales
- Deposit Chapter share of auction and raffle sales

- Deposit merchandise sales proceeds

MEALS & DRINKS

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MERCHANDISE SALES

- Create income statement of sales of items
- Send merchandise sales information to National

PROGRAM & SPEAKERS

- Send thank you letters to speakers

PUBLICATIONS

- Take some of the remaining convention booklets and tour guide booklets for future distribution or use with Chapter tours

REGISTRATION

- Take left over materials back to the Chapter

RISK MANAGEMENT

- Give first aid kits to National
- Retain the emergency contact list for use with future chapter tours

SPONSORS

- Send thank you letters to local sponsors

TOURS

- Give all ice chests, tubs, etc. to owners

TRANSPORTATION

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VOLUNTEERS

- Send thank you letters to volunteers