

# NATIONAL 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

- Send Silent Auction form template to the Chapter
- Ensure a satisfactory supply of raffle tickets is available
- Coordinate with the Chapter and the Facility for required lockable space for the Auction Room and Raffle Room
- Bring any auction, raffle, or sales items to the convention
- Bring raffle tickets to the convention
- Bring pencils and pens for the silent auction to the convention
- Bring collections books to be sold in auctions to the convention

### COMMUNICATIONS

- Send Communications contact list to the Chapter
- Update Communications contact list with Chapter additions
- Develop promotional materials
- Send promotional materials to Communications contact list members
- Update National website and Facebook site with convention information
- Develop and publish videos about the convention
- Send convention information to email contacts
- Place convention ads and articles in the *Overland Journal*, *News From the Plains*, email distributions, and local media
- Send promotional information and a press release to local media well before the convention

- Send promotional information and another press release to local media again shortly before the convention

## **CONVENTION LEADERSHIP**

- Conduct regular meetings with Chapter convention leadership and OCTA Management to review progress, upcoming tasks, and issues

## **ENTERTAINMENT**

- Send Entertainment contact list to the Chapter
- Update the Entertainment contact list with Chapter additions
- Review Chapter recommendations for entertainment
- Coordinate payment for entertainment as needed

## **EXHIBITORS & SALES ROOMS**

- Send Book Exhibitor contact list of interested authors, publishers, and book sellers to the Chapter
- Update the Book Exhibitor contact list with Chapter additions
- Send invitations to authors, publishers, and book sellers
- Coordinate with the Chapter and the Facility about lockable Book room space required for responding authors, publishers, and book sellers
- Coordinate space and participants for the Author's Night Reception
- Obtain staffing for Book room

## **FACILITIES**

- Send the Facilities contact list to the Chapter
- Update the Facilities contact list with Chapter additions
- Review recommended facilities and coordinate the choice with the Chapter
- Travel to the recommended site to review the convention facility and staff with the Chapter
- Serve as the primary contact person for the Facility

- Negotiate, sign contracts, and pay for the Facility to host the convention
- Coordinate with the Facility to set up the required spaces for the Welcome Reception, Author's Night Reception, Awards Dinner, Auction Dinner, lunches, bus loading zones, storage, freezer storage, presentations, and entertainment
- Coordinate with the Facility to set up lockable spaces for the Auction Room, Book Room, and Raffle Room
- Coordinate with the Facility to ensure all microphones, video, computers, and other AV equipment is ready for meetings, presentations, lunches, dinners and other events
- Coordinate with the Facility to ensure AV support personnel will be available as needed

## **FINANCE**

- Send the Budget Workbook template to the Chapter
- Review budget workbook with changes from the Chapter
- Provide seed money to the Chapter to cover startup costs
- Arrange for proper state sales tax applications and collections
- Pay for the facility, meals, etc. on a timely basis
- Pay for buses on a timely basis
- Provide payments for admission to museums, replicas, etc. as needed for tours
- Pay for porta-potties if needed for tours

## **HOTELS**

- Receive hotels information
- Receive RV parks information
- Negotiate and contract convention hotel rates
- Negotiate and contract RV parks rates

## **MEALS & DRINKS**

- Identify required meals and receptions based upon the convention program
- Coordinate meal and reception menus with the Chapter
- Ensure special meal requirements can be met by the Facility or outside caterer as needed
- Plan and contract for meals and reception food items with the Facility
- Plan and contract for outside catered meals as needed
- Plan and contract for bus tour lunches as needed

## **MERCHANDISE SALES**

- Send log of previous convention sales to the chapter
- Arrange for non-profit status with the state if necessary

## **PROGRAMS & SPEAKERS**

- Send Program and Speakers contact list to the Chapter
- Update Program and Speakers contact list with Chapter additions
- Review Chapter recommendations for speakers and program
- Coordinate with the chapter on speaker compensation
- Arrange for hotel accommodations for speakers when required
- Provide and sign contracts for speakers when required
- Bring laptop computer to run meetings to the convention
- Bring microphones for meetings to the convention
- Send out Zoom meeting links for BOD and General Membership meetings

## **PUBLICATIONS**

- Provide templates for convention book, tour guidebooks, schedules, and other printed materials to the chapter
- Coordinate with the Chapter to develop deadlines for the development of all materials
- Develop the National portion of registration materials
- Develop the National portion of the convention book
- Review materials as they are developed by the chapter

- Print all materials including the convention book, tour books, and schedules
- Bring all materials to the convention including the convention book, tour books, and agenda trifolds

## **REGISTRATION**

- Set up online registration for the convention
- Send registration materials to the Chapter for review
- Monitor online registration
- Provide registration reports to the chapter including regular reports of tour participants and meals for planning purposes
- Print name badges with activities
- Bring registration materials to the convention
- Bring name badges and lanyards to the convention

## **RISK MANAGEMENT**

- Ensure insurance coverage is in place for the convention
- Send Risk Management template to the Chapter
- Send National people contact information to the Chapter
- Bring first aid kits to the convention

## **SPONSORS**

- Send Sponsor contact list to the Chapter
- Send sponsor request letter template to the Chapter
- Send Grant contact list to the Chapter
- Review sponsor request letter after updates from the Chapter
- Update Sponsor contact list with Chapter additions
- Update Grant contract list with Chapter additions
- Send sponsor letters to known national sponsors
- Submit grant requests to known national grant providers
- Update Sponsor contact list with Chapter results
- Update Grant contact list with Chapter results

## **TOURS**

- Receive tour routes and bus requirements from the Chapter
- Receive tour guides from the Chapter
- Print tour guides
- Send lists of tour participants and lunch preferences to the Chapter
- Bring ice chests and first aid kits to the convention

## **TRANSPORTATION**

- Review tour routes and bus requirements from the Chapter
- Search for and contact area transportation companies to obtain cost information
- Review recommended transportation company with the Chapter
- Negotiate and sign a contract with the transportation company
- Follow up with the transportation company to ensure the buses will be available when needed
- Send transportation company emergency contact information to the Chapter

## **VOLUNTEERS**

- Send Volunteer Task list to the Chapter
- Update Volunteer Task list with Chapter additions
- Publicize the need for volunteers in News From the Plains and email distributions

# **CONVENTION EXECUTION STAGE**

## **AUCTION & RAFFLE**

- Give the raffle tickets to the Chapter
- Give any auction items to the Chapter
- Conduct live Auction
- Coordinate final sales and distribution of Auction items

## **COMMUNICATIONS**

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

## **CONVENTION LEADERSHIP**

- Coordinate with Chapter convention leadership as issues arise

## **ENTERTAINMENT**

- Lead coordination and setup of entertainment

## **EXHIBITORS & SALES ROOMS**

- Verify space and table setup for Book Room
- Verify space and table setup for Author's Night Reception
- Staff Book room

## **FACILITIES**

- Ensure the required spaces for the Welcome Reception, Author's Night Reception, Awards Dinner, Auction Dinner, lunches, bus loading zones, storage, freezer storage, presentations, and entertainment are set up properly

- Ensure that lockable spaces for the Auction Room, Book Room, and Raffle Room are set up properly
- Ensure all microphones, video, computers, and other AV equipment is ready for meetings, presentations, lunches, dinners and other events
- Ensure AV support personnel are available as needed
- Serve as the primary contact person for the Facility
- Resolve issues with the Facility as they arise with Facility management
- Set up beer and wine for receptions if not handled by the Facility
- Take down, cleanup, and remove beer and wine for receptions if not handled by the Facility

## **FINANCE**

- Receive auction and raffle sales proceeds from the Chapter
- Pay caterers

## **MEALS & DRINKS**

- Confirm meal and reception arrangements and menus with the Facility
- Confirm meal arrangements and menus with outside caterer as needed
- Update meal quantities as needed with the Facility and outside caterer
- Ensure special menu requirements are met and delivered to the needed recipients

## **MERCHANDISE SALES**

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## **PROGRAM & SPEAKERS**

- Set up presentation materials for speakers
- Pay speakers when required

## **PUBLICATIONS**

- Give publications to the chapter
- Get additional copies made of printed materials if needed

## **REGISTRATION**

- Assist with putting attendee registration materials together

## **RISK MANAGEMENT**

- Give first aid kits to the Chapter for use on the buses

## **SPONSORS**

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## **TOURS**

- Give ice chests and first aid kits to the Chapter for use on the buses
- Give bus tour participant lists with lunch preferences to the Chapter

## **TRANSPORTATION**

- Follow up with the transportation company to ensure the buses will be available when needed

## **VOLUNTEERS**

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# **POST CONVENTION STAGE**

## **AUCTION & RAFFLE**

- Receive leftover auction and raffle items from the Chapter
- Take leftover raffle tickets back to National
- Take leftover auction and raffle items back to National

## **COMMUNICATIONS**

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

## **CONVENTION LEADERSHIP**

- Conduct a “Lessons Learned” meeting with the Chapter convention leadership and OCTA Management

## **ENTERTAINMENT**

- Take note of ideas for improvement and responses to entertainment from attendees

## **EXHIBITORS & SALES ROOMS**

- Take leftover books and sales items back to National
- Send thank you letters and surveys to participating authors, publishers, and book sellers
- Review survey results to identify areas for improvement

## **FACILITIES**

- Ensure final payment is made

## **FINANCE**

- Create financial income statement for the convention
- Send the Chapter their share of the auction and raffle sales

## **MEALS & DRINKS**

- Review meal quantities for future conventions

## **MERCHANDISE SALES**

- Receive merchandise sales information from the Chapter
- Update Merchandise Sales log

## **PROGRAM & SPEAKERS**

- Ensure speakers have been paid

## **PUBLICATIONS**

- Take some of the remaining convention booklets and tour guide booklets for future distribution

## **REGISTRATION**

- Take left over registration materials back to National

## **RISK MANAGEMENT**

- Take first aid kits back to National

## **SPONSORS**

- Send thank you letters to national sponsors

## **TOURS**

- Take ice chests back to National

## **TRANSPORTATION**

- Review the transportation company for possible future use

## **VOLUNTEERS**

- Send thank you letters to volunteers who helped with Book room and other National activities

## **LISTS MAINTAINED BY NATIONAL**

These lists should be maintained by National and updated with additional information from the chapter after each convention. They should be sent to the chapter at the beginning of the planning process.

- Communications Contact List
- Entertainment Contact List
- Book Exhibitor Contact List
- Facilities Contact List
- Merchandise Sales Log
- Program and Speakers Contact List      Created by Jerry
- Sponsor Contact List      Created by Jerry
- Grants List      Created by Jerry
- Transportation Company List
- Volunteer Task List

## **TEMPLATES MAINTAINED BY NATIONAL**

These templates should be maintained by National and updated with modifications from the chapter after each convention. They should be sent to the chapter at the beginning of the planning process.

- Silent Auction form
- Budget Workbook
- Convention Book
- Tour Guidebook
- Risk Management Document      To be created by Jerry
- Agenda Trifold
- Sponsor Letter      To be created by Jerry

## **ITEMS TO TAKE TO CONVENTION**

- Raffle tickets
- Auction items, books, sales items
- Pencils and pens for silent auction
- First aid kits
- Ice chests
- Registration materials
- Name badges and lanyards
- Printed materials including
  - Convention books
  - Tour guides
  - Agenda trifolds
- Laptop computer
- Microphones

## **ITEMS TO TAKE BACK TO NATIONAL**

- Raffle tickets
- Auction items, books, sales items
- Pencils and pens for silent auction
- First aid kits
- Ice chests
- Name badges and lanyards
- Some of the printed materials including
  - Convention books
  - Tour guides
  - Schedules
- Laptop computer
- Microphones