

Convention Planning Process Revision Proposal

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PROPOSAL

Modify the OCTA convention planning process to have National perform common, recurring tasks while the chapters perform local tasks. Templates and lists are utilized to share information and streamline the processes.

BACKGROUND

This proposal is based upon a similar proposal presented to a small subset of OCTA in November, 2013, which was kicked around for years and ultimately pigeon-holed by a committee formed at St. George in 2016. The current proposal is based upon 4 more years of experience planning the 2016 Fort Hall convention and provides more detail and clarification.

As a major source of funding, conventions are a necessity for OCTA due to the financial support they provide. They also provide an opportunity for socialization and renewing friendships, as well as learning and experiencing new trail sites.

Historically, OCTA conventions have been planned and hosted by local chapters with limited guidance and assistance from the national organization. Each chapter organizes their own structure and committees to perform the planning effort. Several years of preparation typically go into hosting a convention. The end result is a convention hopefully enjoyed by hundreds of attendees and providing funding for the national organization and to a lesser extent the local chapter. A desired side effect is an increase in local membership although that often does not happen.

People typically join OCTA because of an interest in history and a desire to see and experience the emigrant trails. Tours and outings are often their primary interest. Many of the "rut nuts" will attend outings and bounce across a dusty road but never attend a meeting. One can logically assume that nobody joins OCTA with a desire to plan a convention.

PROBLEMS WITH CURRENT PROCESS

The largest problem with the current process of planning conventions is the amount of work required of the local chapters to host a convention. Many man-years of work are required and often become the responsibility of a very limited number of people within a chapter. Such a work load often causes personal and family issues, and may lead to the loss of key members due to burnout.

The chapters are generally ill-prepared to handle much of the work as they do not have expertise in tasks such as investigating and negotiating with hotels, caterers, and bus companies for example. Being forced to perform such tasks requires chapter members learn how to perform the tasks each time they host a convention, often 8-10 years later with a different set of members. Having a local chapter relearn such tasks each time their turn to host comes around is inefficient and time consuming.

The experience of the Idaho chapter in hosting conventions in 2008 and 2016 depicts these problems encountered by smaller chapters in hosting a convention. Other chapters face similar issues. The Utah Crossroads chapter is currently encountering many of the same issues in planning the 2018 convention.

A summary of these problems include:

- Too much work for small chapters
- Limited expertise in chapters
- Chapters must relearn every time they host

Unfortunate side-effects which often occur from hosting a convention include:

- No increase in membership as a result of the convention
- A loss of key members after the convention due to burn out
- A recovery period of several years to have the remaining members become willing to participate again and to generate new members

BENEFITS OF CHANGE

There are a number of benefits which can be obtained from changing the convention planning process as proposed. The proposed convention planning process

- Promotes cooperation and coordination between National and chapters
- Utilizes previous knowledge and expertise for common tasks to promote consistency and ease of planning
- Utilizes templates and information sharing to make recurring tasks easier

- Promotes refinement and improvement of most areas over time by noting performance, good ideas, and sharing information

SUMMARY OF PROPOSED PROCESS

This proposal incorporates common and recurring tasks being performed by National with local tasks being performed by the chapter. Templates and shared lists are utilized to share information and streamline the processes.

- National to do tasks which are common and recurring
- Chapters to do tasks specific to the location and chapter
- Some tasks are shared between National and chapters
- Share information between National and chapters
- Develop and utilize lists and templates

DETAILS

Details of the proposed convention planning process are defined in the associated spreadsheet. This spreadsheet provides specific details of the duties and tasks to be performed by National and the chapter for each planning category. Although it has been carefully reviewed, there are undoubtedly additional details which could be incorporated. Summaries of proposed convention planning process revisions included in the spreadsheet are shown in the following tables.

Templates

Templates	Content
Communications	Media communications
Exhibitors & Sales Rooms	Contacting authors, publishers, and book sellers
Finances	Financial planning and reporting
Publications	Registration booklet Convention booklet Tour guide booklet
Registration	Registration workbook Attendee name badge
Sponsors	Letter requesting sponsorship

Contact Lists

The revised process incorporates the following contact lists which are maintained by National and updated by the chapters.

Contact Lists	Content
Communications	Newspapers, media, federal, state, local entities
Entertainment	Dancers, musicians, performers, reenactors, etc.
Exhibitors & Sales Rooms	Authors, publishers, book sellers
Facilities	Available facilities which have been considered and used
Programs & Speakers	Available speakers and their presentations
Sponsors	Previous and potential sponsors
Transportation	Bus companies which have been considered and used.

Other Lists

A number of other lists are also to be maintained by National to help the chapters with their planning.

Other Lists	Content
Auction & Raffle	Sales information for future convention planning
Lessons Learned	Ideas and techniques which worked well and did not work well
Merchandise Sales	Sales information for future convention planning
Volunteers	Tasks frequently done by volunteers Sources of volunteers

Primary Responsibilities

Task Category	Primary Responsibility
Auction & Raffle Merchandise Sales Tours Volunteers	Chapter
Communications Exhibitors & Sales Rooms Facilities Meals & Drinks Registration Risk Management	National
Entertainment Finances Programs & Speakers Publications Sponsors	Shared between National and Chapter

Group Tasks

Group	Tasks
Chapter	Obtain and sell auction and raffle items Obtain and sell convention related merchandise Develop publications and tour books based on templates Define tours Solicit volunteers <i>*Assist with determining entertainment, program & speakers</i> <i>*Coordinate finances</i> <i>*Solicit sponsors</i>
National	Send all communications to media Arrange for exhibitors and sales rooms Arrange for facilities, hotels, meals, and drinks Coordinate publications and tour books Handle registration, risk management, and transportation <i>*Assist with determining entertainment, program & speakers</i> <i>*Coordinate finances</i> <i>*Solicit sponsors</i>

RECOMMENDATION

There are a number of components of a convention which are specific to the local chapter and should be performed by the local chapter. Many of the tasks for hosting a convention, however, do not require local knowledge or expertise. It is therefore recommended that the common and recurring tasks of planning a convention which do not require local expertise be performed by National. Expertise gained from having a single organization perform these tasks would simplify the process of planning future conventions because of the knowledge gained.

NEXT STEPS

In order to be successful, this proposal must obtain the approval and support of OCTA leadership. If that occurs, the leadership must determine who serves as the "National" role and when to begin using the revised process. The amount of work required may be too much for a single individual to accomplish. In addition, templates and list forms must be developed and populated.

Although many hours of effort have already gone into the development of this proposal, I recommend that the detail spreadsheet be reviewed by a small committee of people committed to making improvements to the convention planning process. Additional details may be identified which will continue to improve the proposed process.