

		NATIONAL					LOCAL CHAPTER			
Category	Description	Lead	Ongoing	Pre-Convention Planning	Convention	Post-Convention Follow-Up	Membership	Pre-Convention Planning	Convention	Post-Convention Follow-Up
Auction & Raffle	Coordinate acquisition, display, and selling of raffle and auction items.	Chapter	> Maintain a record of raffle and auction sales totals for future convention planning	> Ensure a satisfactory supply of raffle tickets is available > Send Silent Auction template to Chapter > Bring raffle tickets to convention > Bring leftover auction items to convention	> Collect proceeds from auction and raffle sales	> Take leftover raffle tickets back to National headquarters > Take leftover auction items back to National headquarters	> Chapter representative	> Solicit and acquire items for auction and raffle sales > Coordinate with National for Auction space required > Bring items to convention	> Set up Raffle items display > Sell raffle tickets > Staff Auction Room > Coordinate final sales and distribution of Auction items > Conduct live Auction > Give proceeds of Auction and Raffle sales to National	> Take any leftover Auction items
Communications	Promote the Convention through publicity, Web sites, and other activities	National	> Maintain contact list of newspapers, media, federal, state, and local entities, and other interested organizations > Maintain template for media communications	Chapter > Update contact list with Chapter additional information > Send promotional information to contact list members > Update National website and Facebook postings with convention information > Send convention information to email group > Place ads and articles in Overland Journal and News From The Plains > Send promotional information to local media again immediately before the convention			> Chapter representative	> Review 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	Coordinate the overall planning and execution of the convention through a high level oversight committee.	Joint	> Maintain list of ideas and techniques which work well for use in future conventions	> Conduct regular meetings with National and Chapter Leadership			> Convention chairman > Chapter president > Chapter committee leadership	meetings with National and Chapter Leadership > Conduct regular meetings with chapter members		
Entertainment	Coordinate music, special events, and other entertainment activities. Does not include speakers or receptions.	National	> Maintain contact list of available entertainment options such as dancers, musicians, and performers	> Send contact list to Chapter > Update contact list with Chapter additions > Review Chapter recommendations for entertainment	> Assist with coordination and setup of entertainment	> Take note of ideas for improvement, responses to entertainment from attendees	> Chapter representative	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	> Lead coordination and setup of entertainment	> Send thank you letters to entertainers

Exhibitors & Sales Rooms	Coordinate display opportunities for authors, publishers, book sellers, auction items, and other exhibitors in the Auction Room, Book Room, other exhibition areas, and for Authors' Night Reception.	National	<ul style="list-style-type: none"> <li>&gt; Maintain contact list of interested authors</li> <li>&gt; Maintain contact list of interested publishers</li> <li>&gt; Maintain contact list of interested book sellers</li> <li>&gt; Maintain template for contacting authors, publishers, and book sellers</li> </ul>	<ul style="list-style-type: none"> <li>interested authors, publishers, and book sellers to Chapter</li> <li>&gt; Update contact list with Chapter additional information</li> <li>&gt; Coordinate with Chapter about Auction space required</li> <li>&gt; Send invitation to authors, publishers, and book sellers</li> <li>&gt; Plan space for Book Room, Auction Room, and Authors' Night Reception</li> <li>&gt; Bring leftover books and other books and sales items to convention</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Verify space and table setup for Book Room</li> <li>&gt; Verify space and table setup for Author's Night Reception</li> <li>&gt; Lead coordination and setup of authors for Author's Night Reception</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Take leftover books and sales items back to National headquarters</li> <li>&gt; Send thank you letters with surveys to participating authors, publishers, and book sellers</li> <li>&gt; Review survey results to identify areas for improvement</li> </ul>	> Chapter representative	<ul style="list-style-type: none"> <li>&gt; Review contact lists from National</li> <li>&gt; Investigate additional local authors, publishers, and book sellers</li> <li>&gt; Send information for additional local authors, publishers, and book sellers to National</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Assist with setup of Auction Room and Book Room</li> <li>&gt; Assist with monitoring Book Room</li> <li>&gt; Assist with coordinating setup of authors for Author's Night Reception</li> </ul>	
Facilities	Coordinate all convention facilities and hotel accommodations if part of the facility, including space utilization, setup and execution of the facility. Meals and drinks will be covered in a separate category.	National	<ul style="list-style-type: none"> <li>&gt; Maintain a contact list of available facilities which have been considered and utilized</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send contact list to Chapter</li> <li>&gt; Update contact list with Chapter additions</li> <li>&gt; Travel to convention site to review with facility planning staff and Chapter</li> <li>&gt; Serve as the primary contact person for the facility</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Coordinate and monitor facility setup and execution</li> <li>&gt; Resolve issues as they arise with facility management</li> <li>&gt; Serve as the primary contact person for the facility</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Review performance of the facility by conducting a Lessons Learned review to determine those areas which went well and those areas which need improvement in the future</li> <li>&gt; Update list of ideas and techniques which work well</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Convention chairman</li> <li>&gt; Chapter president</li> <li>&gt; Chapter committee leadership</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Investigate possible facilities and hotel accommodations in the area</li> <li>&gt; Send recommendations to National</li> <li>&gt; Host National on facility site visit</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Assist with monitoring facility execution and issues as they arise</li> </ul>	
Finance	Coordinate financial matters for the convention including paying bills, reimbursing expenses, and collecting auction and raffle sales proceeds as required.	National	<ul style="list-style-type: none"> <li>&gt; Maintain a budget template and a financial tracking template</li> </ul>	<ul style="list-style-type: none"> <li>template to Chapter</li> <li>&gt; Provide seed money to chapter to cover startup costs</li> <li>&gt; Review budget workbook with changes from Chapter</li> <li>&gt; Arrange for proper sales tax collection</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Receive auction and raffle sales proceeds</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Create financial income statement for the convention</li> <li>&gt; Send Chapter share of auction and raffle sales to Chapter</li> </ul>	> Chapter representative	<ul style="list-style-type: none"> <li>&gt; Review budget template</li> <li>&gt; Create budget workbook for the convention</li> <li>&gt; Send budget workbook to National for review</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Give raffle and sales proceeds to National</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Receive and deposit Chapter share of auction and raffle sales</li> </ul>
Meals & Drinks	Coordinate with facility catering services and external caterers to provide food and drinks for all required breakfasts, lunches, dinners, snacks, receptions, and bus tours.	National		<ul style="list-style-type: none"> <li>&gt; Identify required meals and receptions based upon convention program</li> <li>&gt; Coordinate meal menus with Chapter</li> <li>&gt; Plan and contract for meals with facility caterer</li> <li>&gt; Plan and contract for meals with outside caterer as needed</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Confirm meal arrangements with facility caterer</li> <li>&gt; Confirm meal arrangements with outside caterer as needed</li> <li>&gt; Update meal quantities as needed with caterers</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Pay caterers</li> <li>&gt; Review meal quantities and satisfaction for future conventions</li> </ul>	> Chapter representative	<ul style="list-style-type: none"> <li>&gt; Coordinate meal menus with National</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Provide staffing to verify meal purchases at all food lines</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Review meal quantities and satisfaction for future conventions</li> </ul>
Merchandise Sales	Coordinate the acquisition and sales of convention related items by the Chapter.	Chapter	<ul style="list-style-type: none"> <li>&gt; Maintain log of Chapter sales to assist future Chapters with planning and purchase of items</li> </ul>			<ul style="list-style-type: none"> <li>&gt; Add sales information to log of Chapter sales</li> </ul>	> Chapter representative	<ul style="list-style-type: none"> <li>&gt; Review log of previous convention sales to help identify items and quantities needed</li> <li>&gt; Arrange for non-profit status with the state if necessary</li> <li>&gt; Design and purchase items for sale</li> <li>&gt; Pay suppliers of items</li> <li>&gt; Market and sell the items</li> <li>&gt; Deposit sales proceeds in Chapter accounts</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Market and sell the items</li> <li>&gt; Deposit sales proceeds in Chapter account</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Create income statement of sales of items</li> <li>&gt; Send sales information to National</li> </ul>

Program & Speakers	Coordinate the development of the convention program including the search, vetting, acquisition, and presentation of all speakers and other program activities. Entertainment activities are handled in a different category.	National	<ul style="list-style-type: none"> <li>&gt; Maintain a contact list of speakers and their presentations</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send contact list to Chapter</li> <li>&gt; Update contact list with Chapter additions</li> <li>&gt; Review Chapter recommendations for speakers</li> <li>&gt; Approve recommended speakers</li> <li>&gt; Contact recommended speakers and coordinate their presentation times</li> </ul>			<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Review contact list from National</li> <li>&gt; Investigate and vet local and regional speakers</li> <li>&gt; Send list of additional speakers to National</li> <li>&gt; Send speaker recommendations to National</li> <li>&gt; Coordinate with National on speaker</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Greet speakers and set up their presentation materials</li> <li>&gt; Introduce speakers to the audience</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send thank you letters to speakers</li> </ul>
Publications	Coordinate development and publication of convention related materials such as registration materials, convention booklet, and tour guide booklets.	National	<ul style="list-style-type: none"> <li>&gt; Maintain templates for registration booklet</li> <li>&gt; Maintain template for convention booklet</li> </ul>	<ul style="list-style-type: none"> <li>of deadlines for the development of all materials</li> <li>&gt; Send templates for all materials to Chapter</li> <li>&gt; Develop National portion of registration materials</li> <li>&gt; Print and distribute registration materials</li> <li>&gt; Develop National portion of convention booklet</li> <li>&gt; Print convention booklet</li> <li>&gt; Print tour guide booklets</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Deliver convention booklets to the convention</li> <li>&gt; Deliver tour guide booklets to the convention</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Keep samples of convention booklet and tour guide booklets</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> <li>&gt; Chapter president</li> </ul>	<ul style="list-style-type: none"> <li>National on the creation of deadlines for all materials</li> <li>&gt; Review templates for all materials</li> <li>&gt; Develop Chapter local portions of registration materials</li> <li>&gt; Develop Chapter local portions of convention booklet</li> <li>&gt; Develop tour guide booklets</li> <li>&gt; Send digital versions of materials in PDF format to National prior to</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Add convention booklets and tour guide booklets to attendee materials as needed</li> <li>&gt; Arrange for sales of convention booklets and tour guide booklets during the convention</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Take remaining convention booklets and tour guide booklets for future distribution or use with Chapter tours</li> </ul>
Registration	Coordinate convention attendee registration.	National	<ul style="list-style-type: none"> <li>&gt; Maintain template for registration workbook</li> <li>&gt; Maintain template for attendee name badge</li> </ul>	<ul style="list-style-type: none"> <li>registration</li> <li>&gt; Receive registration information and add to registration workbook</li> <li>&gt; Send registration materials to Chapter for proofing</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Coordinate putting attendee registration materials together</li> </ul>		<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> <li>&gt; Chapter members</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Receive registration materials and proof against National workbook</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Assist with putting attendee registration materials together</li> </ul>	
Risk Management	Coordinate the preparation for accidents, illness and other untoward eventualities.	National	<ul style="list-style-type: none"> <li>&gt; Ensure insurance coverage for the convention</li> <li>&gt; Maintain risk guidelines document providing instructions on how to reduce risk and handle events which arise</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send risk guidelines document and National contact phone numbers to Chapter</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Bring first aid kits to the convention</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Take first aid kits back to National headquarters</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> </ul>	<ul style="list-style-type: none"> <li>&gt; 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</li> <li>&gt; Review risk guidelines document with all tour leaders and assistants</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Ensure all tour guides have the local contact list on the bus tours</li> <li>&gt; Ensure first aid kits are available on all buses</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Retain the emergency contact list for use with future chapter tours</li> </ul>
Sponsors	Coordinate the acquisition of national, regional, and local sponsors for the convention.	National	<ul style="list-style-type: none"> <li>&gt; Maintain a contact list of previous and potential sponsors</li> <li>&gt; Maintain a template for letter requesting sponsorship</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send contact list to Chapter</li> <li>&gt; Send template sponsorship letter to Chapter</li> <li>&gt; Review letter for convention sponsorship</li> <li>&gt; Update contact list with Chapter sponsor additions</li> <li>&gt; Coordinate ads for sponsors in Overland Journal, News from the Plains, and convention publications</li> </ul>			<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> </ul>	<ul style="list-style-type: none"> <li>sponsors</li> <li>&gt; Review template sponsorship letter and create letter for convention sponsorship</li> <li>&gt; Send letter for convention sponsorship to National for review</li> <li>&gt; Send letter for convention sponsorship to potential sponsors or contact in person or by phone</li> <li>&gt; Obtain sponsorships</li> <li>&gt; Send send sponsorship information and proceeds</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Thank sponsors during meetings or announcements during the convention</li> </ul>	

Tours	Coordinate the definition of routes, training of tour guide booklets, acquisition of tour supplies, loading and unloading of buses, and execution of bus tours.	Chapter	<ul style="list-style-type: none"> <li>&gt; Maintain a template for tour guide books</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Receive tour routes and bus requirements from Chapter</li> <li>&gt; Receive tour guides from Chapter</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Transport ice chests to convention</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Transport ice chests back to headquarters</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Define tour routes</li> <li>&gt; Send tour routes and bus requirements to national</li> <li>&gt; Create tour guides with driving directions, maps, schedules and historical information</li> <li>&gt; Send tour guides to National for printing</li> <li>&gt; Train leaders and assistants on the tour routes and history</li> <li>&gt; Mark the trails along the tour routes</li> <li>&gt; Obtain ice chests, tubs, or other devices to store box lunches, drinks, and snacks for tours</li> <li>&gt; Obtain drinks, snacks, and other items for but tours</li> <li>&gt; Prepare signs and other devices to guide tour participants to the correct</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Load box lunches, drinks, and other supplies onto buses</li> <li>&gt; Set up signs guiding participants to the correct bus</li> <li>&gt; Assist participants with finding the correct bus</li> <li>&gt; Lead bus tours</li> <li>&gt; Unload buses upon return</li> </ul>	
Transportation	Coordinate the acquisition of bus and other transportation as needed for the convention tours and other activities.	National	<ul style="list-style-type: none"> <li>&gt; Maintain a contact list of transportation companies which have been investigate or used previously</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Receive tour routes and bus requirements from Chapter</li> <li>&gt; Contact area transportation companies and receive cost information</li> <li>&gt; Negotiate and sign a contract with the desired transportation company</li> <li>&gt; Follow up with transportation company to ensure buses will be available when needed</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Follow up with transportation company to ensure buses will be available when needed</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Review performance of the transportation company for possible future use</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> </ul>			
Volunteers	Coordinate the acquisition and deployment of volunteers to help with convention setup and manning tables as needed.	Chapter	<ul style="list-style-type: none"> <li>&gt; Maintain standard list of tasks frequently done by volunteers</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send volunteer task list to Chapter</li> <li>&gt; Update volunteer task list with Chapter additions</li> <li>&gt; Publicize the need for volunteers in News from the Plains and email distributions</li> </ul>			<ul style="list-style-type: none"> <li>&gt; Chapter representative</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Review and revise the volunteer task list</li> <li>&gt; Send list of additional volunteer tasks to National</li> <li>&gt; Contact chapter members and solicit volunteers</li> <li>&gt; Identify local and area organizations which may be sources of volunteers</li> <li>&gt; Contact local and area organizations, publicize the convention, and solicit volunteers</li> <li>&gt; Create list of volunteers and their assignments</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Coordinate volunteers and their assignments</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Send thank yous to volunteers</li> </ul>