

National Association for Interpretation

NATIONAL CONFERENCE PLANNING MANUAL



PREFACE

The NAI National Conference has evolved over many years into a well-respected event. It is known for providing excellent professional development programs and networking opportunities for participants. When NAI and its predecessors (Association for Interpretive Naturalists, AIN and Western Interpreters Association, WIA) had little or no staff, a strong volunteer committee was critical to the success of the event. Although NAI staff has performed most of the conference planning and execution since 2005, we continue to rely upon a strong volunteer planning committee. Their input and energy are critical to conference success. One hallmark of NAI National Conferences is the local flavor each conference committee brings to the event.

The NAI Board of Directors has set the overall conference guidelines for all NAI National Conferences. The conference both generates and consumes considerable resources of the organization each year, so it is important that conference committees follow the guidelines in this manual. While we welcome innovation and encourage creativity, the executive director will need to approve any substantial deviations from these guidelines.

We hope your participation will result in the most successful NAI National Conference to date...and thank you for taking on this challenging but rewarding task!

GOALS OF THE NAI NATIONAL CONFERENCE

- Have a successful event measured by an evaluation so that participants leave with technical knowledge or skills, and the desire to attend future conferences.
- Provide an affordable training event accessible to both students and professionals.
- Give participants the opportunity to experience prominent cultural and natural features in and near the conference venue through special events, programs, and off-site sessions.
- Permit a broad range of high-quality presentations to be given with at least 50% volunteered papers and the remainder of papers to be solicited. All papers will be subject to selection by a program committee review process.
- Seek a balance between educational content and networking events.
- Seek, through promotions, attendance of 800-1000 people.
- Increase membership in NAI.
- Through conference sessions, address matters of national concern and include a diverse range of topics to interest different kinds of NAI members (natural history, cultural history, interpretive site management) and include both demonstrations of skills and techniques, and examples of successful programs.
- Strive for gender and ethnic balance among keynote and/or general session paid presenters.
- Reinforce organizational units by design of the program, speakers, and activities.
- Contribute to NAI operating budget as determined by the annual business plan.

GENERAL CONFERENCE GUIDELINES

Title

The title for the conference will be “NAI National Conference” and all promotional materials will use this term. For many years the event was called the National Interpreters Workshop, or abbreviated to NIW, but the new term should be encouraged and used and the old term, NIW, discouraged.

Selecting a Site

The NAI executive director and the events manager select a host city and facility by following a review of proposals submitted by invited cities several years prior to the conference. Sites will rotate from one of four quadrants covering the US: West, Rockies, Mid-country, and East. The exact boundaries are available at the NAI National office, but generally follow state boundaries, rivers or major highways, whichever is most applicable. Every attempt will be made to vary the location within these quadrants in order to provide geographic diversity and variety.

Site locations should:

- adequately serve the logistical needs of up to 1000 people
- be easily accessible (including by air and for disability access)
- be unified – exhibit hall, lodging and concurrent sessions must be in close proximity
- have reasonably modern or up-to-date conference facilities
- provide good off-site session and special event opportunities
- be attractive to NAI members and their families
- be priced to reflect the profile of NAI’s average conference participant
- allow for the possibilities of local external funding (corporations, foundations, etc.)

The rotation schedule for future conference sites includes:

2016, Corpus Christi, TX
 2017, Spokane, WA
 2018, New Orleans, LA
 2019, Denver, CO

Selecting a Date

The NAI National Conference will be held in the fall, preferably before Thanksgiving, unless special circumstances occur which would make changing the time more advantageous (a joint conference, attractive location/rates, or a special weather-related theme, for instance). The National Conference should not be scheduled immediately before or after October 1st, the start of the federal fiscal year. NAI’s staff will negotiate dates of the conference with the conference host city and facilities.

Length/Schedule of NAI National Conference

The conference should be four days in length (excluding registration day and pre-conferences). The traditional conference format is:

Monday: pre-conference sessions, miscellaneous federal agency meetings (optional)

Tuesday: registration, pre-conference sessions, NAI board meeting, miscellaneous federal agency meetings (optional)

Wednesday: Native American welcome, keynote presentation, concurrent sessions, exhibit hall opening and evening social in the exhibit hall, evening special events

Thursday: concurrent sessions, exhibits, silent auction, federal agency awards, live auction

Friday: concurrent sessions, NAI Awards Banquet

Saturday: off-site sessions

Staff Responsibilities

Staff assigned to the NAI National Conference include:

- Executive Director – contract negotiations, general management of event, sponsorships and in-kind donations
- Events Manager – budget, contract negotiations, committee oversight, logistics management, food & beverage, AV contract, function space allocation, program scheduling, transportation, off-site session selection and coordination, keynote selection, exhibit hall decorator selection, exhibit solicitation, exhibit hall management
- Deputy Director – logo development, all conference materials, online and printed (registration packet, proceedings, program guide, mobile app, etc.), solicit sponsor ads for program guide, co-ordinate AV logistics, website maintenance
- Membership Manager – registration, pre- and post-event participant list

- Certification and Training Manager—program input and development
- Certification Office Administrator—manages association store
- Bookkeeper – financial transactions

Steering Committee

Two years before the conference, the events manager will hold an informational meeting at the National Conference for anyone who might be interested in helping with the conference year after next. OU directors of the region(s) in which the conference will be held also may recommend committee members, but the events manager must approve the committee. Preference in selection of conference committee members will be given to those who reside in the host city or region and those who can bring with them various elements of support from their agency or organization.

Participation on the steering committee is considered an excellent leadership development opportunity and NAI looks for individuals with a strong commitment to the organization and the field. Steering committee members receive complimentary conference registration.

The conference Steering Committee will consist of the following chairs:

Conference Chair

- works directly under the supervision of the events manager on all major decisions
- develops agendas for conference calls and notifies those involved of the calls
- ensures that committee members meet deadlines

Program Chair

- is second in line should conference chair become unable to carry out duties
- participates in review of off-site session proposals and evaluates for programmatic considerations
- handles peer review of presentation proposals

Publicity/Promotions Chair

- works with events manager and deputy director to develop conference promotions
- develops list of non-members in the host region who might attend
- develops sign plan, if necessary

Volunteer Chair

- coordinates volunteers for conference activities
- works with auction committee chair to carry out silent and live auctions
- ensures exhibitors' needs are met in the exhibit hall

Local Arrangements Chair

- coordinates off-site sessions and other activities and special events to local venues
- requests discounted or complimentary admissions, etc., as appropriate
- coordinates any local needs, identifies local providers for transportation, off-site catering, etc.

In addition to other specific duties, all Steering Committee chairs will:

- provide conference chair with list of committee members, their agencies or organizations, addresses, and phone/fax numbers (conference chair will forward list to staff and committee members) and keep the list current
- develop detailed timetable for tasks and track accomplishments of his / her committee (with events manager)
- keep copies of all correspondence and email
- provide information as needed to events manager
- copy all listed NAI staff and conference committee members on correspondence and email

Steering Committee chairs shall be selected based on the following criteria:

- NAI member (All conference committee chairs and committee members must be NAI members for the duration of their committee tenure.)
- ability to meet with conference committee on a regular basis (conference calls)
- ability to meet deadlines
- proven leadership and organizational skills
- support of employer in terms of work release time and access to office equipment

- commitment to complete duties as assigned during planning process and conference, including follow-up activities
- previous attendance at national NAI conference(s)

If a Steering Committee chair becomes unable to serve, the events manager should be notified immediately and a suitable replacement will be appointed.

Other NAI members who play an integral role in the NAI National Conference (but are not part of the steering committee) include:

- Silent and Live Auctions (volunteer Chair and Committee)
- Media Awards (Interpretive Media Section)
- Professional Awards (National Awards Chair)
- Interpretive Career Fair (College and University Academics Section)
- Student Scholarship Committee (College and University Academics Section)

Committees

Each chair should develop his/her own committee as needed to accomplish specific tasks, but only staff-approved Steering Committee chairs will have the responsibility for decision-making. Co-chairs may not be appointed by conference committee chairs as there is only one complimentary registration associated with this position; however, if a committee chair requires assistance, he or she may designate an assistant or deputy to accomplish the necessary tasks. Assistants or committee members will not participate in Steering Committee conference calls or on-site meetings. Committee members are expected to provide significant assistance in the planning process, and therefore will be eligible for the volunteer discount for conference registration. While there is no set number of members for each committee, chairs should consider what assistance they need and plan accordingly. Committee members who do not actively participate and contribute significant assistance will not be given the volunteer discount.

Important Contacts and Communications

NAI National Office toll free: 1-888-900-8283

Staff contacts:

Margo Carlock, executive director: mcarlock@interpnet.com
 Deb Tewell, events manager: dtewell@interpnet.com
 Jamie King, membership manager: jking@interpnet.com
 Paul Caputo, deputy director: pcaputo@interpnet.com
 Emily Jacobs, certification and training manager: ejacobs@interpnet.com

Board contact:

Todd Bridgewater, vice president for programs (NAI Board of Directors), toddbridgewater@gmail.com

NAI Website: www.interpnet.com

The NAI website has an NAI National Conference link that contains the registration packet in down-loadable or interactive format, and may be used in other ways to promote NAI National Conference activities. The NAI website is the official website for the conference. A conference committee may create their own site for intra-committee communication, but such a site will not be available to the general membership.

The membership manager will set up committee members to have access to conference registration information in the Resources section of the web site.

Communication and Support Services/Conference Calls

Two years before the conference, the conference committee begins quarterly conference calls initiated by the national office. Starting in January of the year of the conference, the committee begins monthly tele-phone conference calls. These one-hour calls occur at a mutually agreed upon time that does not change (for example, the first Friday of the month at 9 a.m. Pacific time). Minutes are taken from each call by NAI staff and copies are sent to conference committee immediately following the meeting. Each committee will decide whether weekly calls are necessary the month before the conference.

NAI staff can send out bulk emails, sorted as needed, for committee use; the conference logo can be provided as an e-file so it can be used as part of correspondence. At least four months before the conference a conference-based monthly newsletter will be sent to all NAI contacts in addition to regular marketing emails focusing on specific news, events, speakers, etc.

Slogan/Logo

The slogan is determined by the conference committee with the approval of the national staff. It provides unity for the overall program and activities, but does not necessarily dictate the content of all program sessions. The slogan may reflect the conference city or region, or may address current issues related to interpretation. The slogan should be used in conjunction with the conference logo to readily identify the conference.

The conference logo will be designed by the NAI deputy director. The NAI logo, conference logo, or reference to the conference must appear prominently on all print or electronic media. It is important the logo specifications be followed closely to ensure continuity.

Policies Regarding Complimentary or Discounted Registration

National staff makes determinations for complimentary or discounted conference registration fees based on board guidelines and budget necessity. The following are the general guidelines:

Complimentary registration:

- Conference Steering Committee chairs (5)
- NAI staff
- NAI president
- Exhibitors receive two complimentary registrations with their booth fee

Discounted registration: (includes sessions, events and meals included in basic registration; optional special events, pre-conferences and off-site sessions are paid for by individual)

- board members
- conference volunteers contributing more than 8 hours of volunteer service (must sign up ahead of time and be approved for discount)
- additional (more than two) exhibit booth attendants

May be paid for services:

- keynote speakers, according to contract
- pre-conference training presenters, according to contract
- entertainers for special events, bands, according to contract
- off-site leaders should be site hosts and the fee is waived; alternative leaders may be paid only in special circumstances and will be approved by the events manager

Not paid for services or given complimentary or discounted registration:

- concurrent session speakers
- volunteers who do not contribute the minimum number of hours

NOTE: Staff negotiates contractual relationships for keynotes, programs, special evening events and off-site sessions. Committee members who wish to suggest alterations to any contracts must discuss the changes with events manager before making contact with any contractor.

CONFERENCE COMMITTEE TIME LINE/CHECK LIST

The conference chair should use this time line to keep conference committee on track by entering dates specific to his or her NAI National Conference. (Note: Staff responsibilities are not listed in this timeline.)

24 – 18 months before the conference _____

- inaugural meeting at NAI National Conference two years out (Interest in being on the committee will be determined at this meeting.)
- develop and/or refine slogan (publicity/promotions chair and conference committee)
- develop promotional plan (publicity/promotions chair)

18 months before the conference _____

- develop traveling promotional materials for use at the National Conference the year before (booth, slide show, etc.) (publicity/promotions chair)

12 months before the conference _____

- exhibit booth at current national conference (publicity/promotions chair)
- promotional presentation at current national conference (publicity/promotions chair)
- identify potential special events (program chair/local arrangements chair)
- identify off-site session options (program chair/local arrangements chair)

11-10 months before the conference _____

- begin monthly conference calls

9 months before the conference _____

- promotional articles in NAI Now and OU newsletters (publicity/promotions chair)
- assist events manager in getting photos of off-site session or special event sites for use in registration packet/web page (program chair/local arrangements chair)
- begin volunteer marketing (Volunteer chair & Publicity chair)

8 months before the conference

- presentation proposals due to program committee for review (program chair and review committee)
- proposals distributed to program committee for peer review process (events manager)

6 months before the conference _____

- deliver results of peer review process for speakers to events manager (program chair)
- locate someone to develop and distribute the daily newsletter (publicity/promotions chair)
- solicit and identify volunteers for major positions (reduced registrations)(volunteer chair and NAI staff)

5 months before the conference

- Confirmation letters sent to those whose proposals were accepted (program chair and events manager)
- Rejection letters sent to those whose proposals were not accepted (program chair and events manager)
- volunteers selected and notified (volunteer chair)
- Open volunteer registration (volunteer chair and NAI staff)

3 months before the conference _____

- contact volunteers and assign tasks for on-site activities (volunteer chair)
- finalize arrangements with auction chair (volunteer chair)
- conference program guide content submitted by all conference committee chairs to events manager
- write generic news release and send to NAI staff and OU newsletter editors (publicity/promotions chair)
- send newsletter articles to OU newsletter editors soliciting auction items (publicity/promotions chair)

2 months before the conference _____

- confirm needs for training hoppers and strutters (volunteer chair)
- work with events manager to identify bus hosts for off-site sessions (program chair/volunteer chair)

1 month–1 week before the conference _____

- work with events manager to bring or order auction bid sheets, item tags, etc. (volunteer chair)

CONFERENCE ON-SITE TIMELINE: BOTH COMMITTEE AND NATIONAL STAFF

1–2 days before the conference _____

- arrive at conference site
- attend pre-con meeting with hotel and/or convention center staff (conference steering committee & events manager, executive director)
- set up AV room/conference office/registration area (conference steering committee & NAI staff)
- deliver office equipment and supplies to conference site (NAI staff, conference chair)
- assemble registration materials (NAI staff/steering committee, conference volunteers as arranged by volunteer chair)
- install all signage (publicity/promotions committee and deputy director)

During the conference

- hold daily committee meetings for troubleshooting (events manager and conference steering committee)
- monitor Ticket Trader Table and all other volunteer functions (volunteer chair)
- coordinate room monitors (volunteer chair)
- make certain that speakers understand the process for room monitors to monitor rooms/session evaluations (program chair)
- prepare and distribute daily newsletter (publicity/promotions chair)
- ensure that room monitor notebooks and concurrent session evaluations are distributed to each meeting room and evaluation forms are replenished as needed in each meeting room (volunteer chair)

1 week after _____

- coordinate lists with events manager and send thank-you notes to keynotes, speakers, (program chair)
- send thank-you notes to sponsors, VIPs, hotel staff and conference committee (conference chair)
- send thank-you notes to all conference volunteers (volunteer chair)

30 days after _____

- submit final committee reports (all chairs)
- participate in final wrap-up conference call

COMMITTEE CHAIR POSITION DESCRIPTIONS AND RESPONSIBILITIES

Conference Chair Position Description

- maintains a list of all committee chairs, addresses, phone, fax and email addresses and delivers to conference committee and NAI staff; updates list as needed
- develops and monitors deadlines for conference committee members
- monitors timeline for overall conference duties
- sets agendas for conference committee conference calls (limit calls to one hour); notifies events manager, and vice president for programs of all meetings and calls so they can be initiated from the national office using NAI conference call line
- takes meeting and conference call minutes and distributes to chairs, staff and vice president for programs when NAI staff cannot do it
- handles general correspondence and routes to appropriate committee chairs as necessary
- schedules dates and sites for on-site conference committee meetings with events manager
- keeps events manager and vice president for programs updated on committee problems or needs
- coaches and cheers the committee chairs
- researches Department of Revenue regulations for NAI, Association Store, and exhibitors selling items in exhibit booths

At or after NAI National Conference:

- meets on-site with hotel staff and NAI staff 2-3 days prior to conference to review all arrangements
- serves as point person for on-site committee decisions during conference
- attends daily committee meeting during conference to troubleshoot, discuss next day's events and committee chairs' needs
- keeps a list of names and sends a personal note to the general manager after the event to single out those hotel or convention center staff who were especially helpful

NOTES

- sends thank you notes to hotel staff and others who made life easier during the event, including support agencies
- solicits written evaluation reports from each committee chair, compiles, and delivers to NAI staff, vice president for programs, next year's NAI National Conference chair.

Program Chair Position Description

- recruits program committee members as needed to accomplish program committee tasks
- provides conference chair with list of committee members and contact information
- coordinates program committee to review and select volunteered papers (There should be three reviewers for each proposal.)
- coordinates with CUA section to review all research papers
- provides on-site contact to troubleshoot for presenters during conference
- provides list of volunteer needs to volunteer chair (room monitors and bus hosts, etc.)
- develops detailed timetable for tasks and tracks accomplishments of committee members
- maintains committee list and contact information including email addresses and forwards this to conference chair
- keeps copies of all correspondence and emails
- identifies list of potential regional keynote speakers and submits to events manager for final selection and contracting
- reviews and recommends volunteered papers to events manager
- works with events manager to solicit potential programs from speakers with known excellent presentation skills (No more than 50% of program sessions may be solicited.)
- prepares list of potential special events for special events night with contact information and submits the list to events manager
- prepares list of potential off-site session venues with contact information and submits the list to events manager for final selection and contracting

- works with events manager to solicit Marketplace of Ideas presenters if there are not enough proposals submitted through Call for Presentations
- coordinates room monitors with volunteer chair
- trains room monitors

Publicity/Promotions Chair Position Description

- develops detailed timetable for tasks and track accomplishments of committee
- provides conference chair with list of committee members, agencies, addresses, and phone/fax numbers
- keeps copies of all correspondence and emails
- provides list of volunteer needs to volunteer chair
- recruits committee members to assist with tasks
- has committee members assist with designing booth at prior year NAI National Conference to promote your event; and NAI National Conference promo at prior year's event
- develops and implements promotional plan to include: website, conference promotion booth and live conference promo during previous NAI National Conference, OU newsletters, NAI Now articles and press releases to like-minded organizations
- prepares and submit articles and photos for NAI, OU and national publications and publications for like-minded organizations
- work with NAI staff/deputy director to line up promotions and news coverage of conference and serve as local contacts (executive or deputy director serves as NAI spokesperson)

Further Detail - On-site Daily Newspaper

Purpose: Provide daily updates of conference to NAI National Conference participants.

Format: electronic; print

Distribution: Print version is provided at registration desk; electronic version is available on the mobile app.

Who does what: Designated committee member writes and arranges for distribution. Often much of the content can be pre-written and laid-out before arrival at the conference. Front side may be pre-printed prior to arrival at conference. Check with NAI staff for sponsor of newsletter.

Proof copies: Proofread by committee members and NAI staff.

Approximate production schedule:

- Have first day's daily newspaper completed, brought on site then stuffed in registration packets.
- Locate a local copy shop and set up a temporary charge account

Volunteer Chair Position Description:

- develops detailed timetable for tasks and tracks accomplishments of committee
- provides conference chair with list of committee members, agencies, addresses, and phone/fax numbers/email addresses
- keeps copies of all correspondence
- updates job descriptions for volunteer needs using information from steering committee
- consults with NAI staff on numbers and types of volunteers needed
- determines training and orientation needs for volunteers and provide appropriate training
- provides schedule of volunteer positions to deputy director to post on website
- selects key volunteers to be trained in every on-site capacity, knows where those volunteers are staying, in case they need to be contacted; provide personal contact information to all volunteers in the event they need to make a change in their schedule or have questions

- recruits volunteers prior to conference for unfilled positions
- distributes volunteer pins to those working four or more hours as a volunteer
- works with events manager to arrange for message board(s) in registration area
- works with events manager to organize a volunteer room, if space and contract allow

Sample Volunteer Confirmation

Dear _____

You are scheduled for the following activity(ies):

Date _____ Time _____

Location

Materials needed

Job Description

Please check in at the volunteer table in the conference registration area at least 30 minutes before the scheduled activity

Please complete and return to: volunteer management chair/
address/ phone

Thank you so much for your help—we couldn't do it without you!

NOTES

Suggested volunteer needs:

Auction

Auction Chair will coordinate auction volunteer needs (numbers and types) with the Volunteer Chair, but this generally includes:

- Auction Item Check-In (need 4 or more)
Assists auction donors in filling out form; logs in auction items and assigns each item a number; enters data into computer
- “Hupper” (need 4 or more, traditionally student scholarship award recipients)
Assists auctioneer by identifying those individual bidders who are bidding on a given item. Must have a strong loud voice, be focused and not be shy in crowds.
- \$\$ Bucket Person (need 1 if this is part of the auction, ask Auction Chair)
Walks through bidders and others at the auction encouraging them to add cash to the money bucket
- Price Drop Monitors (need 2)
Staff the price drop booth; inform bidders of how the system works; ring the bell at half hour time intervals; take bid sheets to cashier table after each bell
- Set up Crew (need 5-10; check with Auction Chair)
Assist auction chair with setting up the live and silent auction items, bell auction items, and cashier line
- Silent Auction Monitors (need 4-10; check with Auction Chair)
Staffs silent auction area to answer questions and serve as “security” for the items on the silent auction table; picks up bid sheets at the close of the auction; identifies winners and enters information into the database
- Strutter (need 10—scholarship recipients typically help with this)
Assists auctioneer by showing individual items through the audience; if a particular bidder is interested in getting a closer look at an item, the strutter will take it over to where that person is sitting; in a heated bidding war the strutter is expected to walk the item between the bidders in the attempt to have bidders bid higher on the item

Audio-Visual Assistant

(need 3; various times to distribute / collect AV equipment; these will be recruited by the deputy director)

Assist NAI staff by placing AV equipment in each location where it is required then re-moving the equipment to storage at the end of the day; and accounting for equipment at the end of each day. This is especially important at the end of the conference so that all AV is packed before the conference concludes.

Ticket Checker

(need one at each entry or two at each buffet table line)

Greet meal participants; check tickets and point participants toward cash bar and/or va-cant places at tables.

Bus Host (need 15)

Helps direct participants to the location for their bus for a given special event or off-site session; greets participants as they get on the bus; takes tickets from participants as they get on the bus; marks their names off lists; answers questions about the event; and ensures that all participants get back on the bus at the conclusion of the event

Marketplace of Ideas Monitor (need 2)

Staffs MPI to assist presenters with anything they might need

Opening Reception Greeter/Checker (need 4)

Greet participants as they arrive at the opening reception; direct them to the food tables and the bar; check for conference nametags

Packet Stuffer (5)

Stuff registration packets on Sunday afternoon and deliver them to registration area

Pre-conference Session Monitor (need 5)

Contact pre-conference presenters/organizers to see if there is anything you can get for them. This is generally handled by steering committee members.

Signage Assistant (need 2)

Help deputy director put up signage for each venue and outside each concurrent session room at the beginning of each day and makes sure signage changes as the sessions change. (Check each year with deputy director person to see if this job will be necessary.)

Registration Assistants (need 10)

Assist membership manager with registration activities during peak registration times

Room Monitor (need 10-12)

Introduce concurrent session speakers to the audience; reminds audience of evaluations on the mobile app and hands out and collects evaluation forms for those not using the app; posts “session full” sign when room fills; counts number of attendees and notes on the room monitor form; assists with AV and anything else speaker needs. These volunteers will be assigned (or select) a meeting room in which to have their station for the 4-hour blocks of sessions.

Music Volunteer (need 1-2)

Staffs music suite; greets participants; refills snack bowls as needed; serves as “security” for the room and lets hotel staff know when the room is vacated so it can be locked each night.

Association Store Crew (need 4)

Assist NAI staff in setting up/tearing down Association Store (books and logo clothing) in the exhibit hall and with moving the Association Store to registration area after exhibit hall closes; assists staff during sales in exhibit hall

Stage Manager (need 1)

This is the publicity/promo chair’s duty. Assist NAI staff or contractor with any AV needs prior to and during keynote presentations, let speakers know when their ending time is approaching, show keynote to book signing, if they have one following the keynote presentation; handles movement onto and off of stage during morning awards, announcements, keynote speaker

Ticket Trader Table (need 4)

Staff Ticket Trader Desk in one-hour shifts to assist participants who want to buy or sell tickets to special events, off-sites or awards banquet. Oftentimes this can be accomplished by the volunteer chair as they monitor the volunteer table.

APPENDIX A: OPERATION OF THE SILENT AND LIVE AUCTIONS

Things to do before the auction

- Plans online auction to take place prior to the event
- writes auction press releases and send to publicity chair to integrate into submissions to all OU newsletter editors
- writes auction article for NAI Now, check with NAI staff for production schedule deadline and forwards article to publicity chair
- works with executive director to solicit 3-4 big-ticket items for live auction
- solicits OU baskets from each OU. Contact OUs 6 months before National Conference, and again 1-2 months before the event.
- contacts volunteers, including scholarship winners and scholarship committee, to assist with the auction
- work with membership manager to remind conference participants about auction items in con-firmation letter
- contacts national office for any stored auction materials, forms, bid paddles or donated items left over from the previous year
- orders bid paddles, if needed
- arranges for on-site logistical needs with events manager
- prepares announcements regarding auction

On-Site Logistical Needs

- provides text to publicity chair for daily newsletter to update successful bidders and letting them know where and how to pick up their auction items
- works with volunteer chair to get volunteers for auction item check-in to help registrants sign in auction items (or use your own committee members)

Auction Supplies

- auction item tags (500), string, tape, pens for check-in
- bid paddles (1000)
- silent auction bid sheets (600) and 300 second sheets
- calculator
- pens/pencils
- cash boxes
- clothes rack and clothes hangers for t-shirts
- easels to display artwork
- boxes and dollies for moving items from place to place
- bell to announce “price drops”
- stand to display quilts or large items that may be donated

Organizing the Auction

- work with events manager to solicit items from exhibitors 2-3 months before National Conference
- solicit items from conference participants (through OU newsletters and registration packet)
- coordinate with local arrangements chair for solicitation of items from local businesses, previous “big-ticket” donors, personal contacts, agencies in the region where the conference is being held, region members

Check-In of Items at NAI National Conference

- use self-service check-in of items as they arrive at the conference in registration area. Leave boxes, pencils, and item tags with instructions for donors to fill out. Provide tape and string for attaching cards to items. Have blank certificates available for donations that are intangible. Have volunteers assist with check-in and carrying items to auction storage location.
- when collecting items donated, check that tag has been filled out and attached properly
- separate items for silent auction or live auction (should be your choice, not the donor’s)
- make note of donors for follow-up thank-you notes

Silent Auction Items

- prepare silent auction bid sheet with item description, opening bids (set low), and bid increments
- set out items so bidding can begin on time
- pick up bid sheets and items at specified time (no late bidding), make sure that bidding closes after concurrent sessions are over (not in the middle of sessions)
- pick up bid sheets and transfer winning bid and name of successful bidder to item tag
- notify winners immediately by posting a list of winners in a central location and publicizing that location in the daily newsletter
- allow auction winners pick up and pay for items during posted hours until afternoon of live auction where items can also be picked up and paid for; only NAI staff will take money for auction items
- gives list of silent auction winners to Publicity/promotions chair for inclusion in on-site newspapers and announcements during conference
- changes items each day prior to and including auction day

Live Auction Procedures

- set out items for preview at least 1 hour before auction begins (do promos of big ticket items during meals throughout conference, and in daily newspaper)
- limit live auction to 2 hours at the most and begin bidding on time—do not schedule entertainment before, during or after the auction.
- strutters pick up item from table (with item tag attached), carries it to auctioneer
- auctioneer holds it up, hands it back to strutter who carries it around room while bidding is going on
- when final bid is taken, strutter hands the successful bidder the item, fills out bidder number and amount on tag, then takes tag to cash-out table
- bidders can cash out anytime—all their live auction tags should be at the cash-out table

- only national office staff are permitted to collect money for auction sales
- NOTE: Auctioneers need to remember to not only move items along quickly, but to get the most money possible for the item. Auctioneers need to constantly remind audience members that the scholarship auction is about giving to the future of the profession and not getting the best deal on what they purchase.

Other Events During Live Auction

- have a t-shirt, poster, and book areas where the price for any items begins high at start of evening (\$50) and drops in \$5 amounts every 10-15 minutes throughout the evening; have a loud bell to ring to announce price drops
- consider having door prizes or a free beverage ticket to encourage attendance.
- have a handout or signage at the door (or at each auction activity) to describe the different activities and how they work

Follow-up

- complete report & send to national office and scholarship committee
- send thank-you notes to those who donated items with IRS wording (office will provide)
- send equipment and materials (such as auction paddles, pens, credit card machine, etc) and any donated items that are leftover to national office for storage

APPENDIX B: NAI NATIONAL CONFERENCE GLOSSARY

- Classroom style—indicates the set-up of a meeting room with rows of tables in front of chairs.
- Conference committee—consists of five chairs as outlined in board-approved guidelines: Conference chair, Program chair, Publicity/ Promotions Chair, Volunteer Chair, and Local Arrangements Chair
- Conference Office—headquarters for NAI national conference committee and staff while on-site. Daily meetings are usually held here and AV equipment may be stored here.
- Conference Promo Booth—an exhibit booth and/or promotional materials at national or regional conferences to encourage participation at the upcoming national conference
- Drayage—the “stuff” that accompanies the exhibit hall; the decorating company will usually arrange for drayage—transportation/shipping of exhibits, drapes, booth furniture, etc.
- Green room—practice room for speakers
- Hupper—someone who stands in front of the audience during the auction to draw attention to a bid by shouting to the auctioneer that a bid has been made and pointing to the bidder.
- Interpretive Sourcebook—proceedings of the conference; a collection of program papers
- NAI National Conference— Annual event previously known as the National Interpreters Workshop (NIW) or NAI National Workshop
- Program Guide—the booklet given out at registration with all the conference scheduling and information in it
- Solicited Presentations—presentations which have been requested by Program committee from individuals known to have specific presentation skills or subject matter expertise germane to the conference theme. Presenters are not paid and must adhere to standard guidelines as presented in the call for presentations and selection process
- Strutter—someone who “struts” through the audience during the auction with the item being bid on so the audience can see it more closely; also brings items waiting to be bid on up to auctioneer
- Theater Style—indicates the set-up of a meeting room with rows of chairs, one behind the other.
- Volunteered Presentations—presentations which are submitted in response to the Call for Presentations

APPENDIX C: BOARD APPROVED CONFERENCE GUIDELINES

The NAI Board of Directors will only consider exceptions to these guidelines on a case by case basis.

Title

The title for the conference will be “NAI National Conference” and it will be referred to as such in all pro-motional materials. The term “National Conference” may also be used and sometimes it is referred to as NAI

Conference Schedule

1. The NAI National Conference will be held in the fall, preferably in November before Thanksgiving, unless special circumstances occur which would make changing the time more advantageous (a joint conference, attractive location, or a special weather-related theme, for instance). The National Conference should not be scheduled immediately before or after October 1st, the start of the federal fiscal year. NAI's staff will negotiate dates of the conference with the conference host city and facilities.
2. The Conference should be four days in length (excluding registration day). The conference should ideally follow this format:

The conference should be four days in length (excluding registration day and pre-conferences). The traditional conference format is:

Monday: pre-conference sessions, miscellaneous federal agency meetings (optional)

Tuesday: registration, pre-conference sessions, NAI board meeting, Native American welcome, miscellaneous federal agency meetings (optional)

Wednesday: keynote presentation, concurrent sessions, exhibit hall opening and evening social in the exhibit hall, evening special events

Thursday: concurrent sessions, exhibits, silent auction, federal agency awards

Friday: concurrent sessions, NAI Awards Banquet, live auction

Saturday: off-site sessions

Finances

Overhead expense for national office services is built into the NAI National Conference and defined by the overall NAI budget, which the board of directors approves annually.

Any excesses of profit above the defined amount for national office overhead goes into NAI's general operating budget. Auction proceeds go into the scholarship fund or other similarly designated fund. Amounts above the annual student scholarship disbursements will be distributed as certification training scholarships.

The conference should be reasonably priced so that interpreters without agency support, seasonal employees, etc., may participate. Spouses and students should have a reduced rate covering fixed costs. Non-member registration fee includes the cost of membership in NAI for the following year. The early registration cut-off should be at least two months before the beginning of the conference. On-site registration fees should be higher than pre-registration fees. The sum of day registration fees must exceed the cost of full registration.

The events manager and executive director will be responsible for setting the fixed costs of registration (such as meals). Members of the board of directors pay a reduced registration fee that will include those events and meals covered by regular basic registration.

The national office will be responsible for handling all conference funds. Receipts or invoices are required for all debts and reimbursements.

All contracts for registration, AV, food service, meeting and exhibit space, decorators, transportation, printing, and special events must be approved and signed by the executive director. Whenever possible, it is essential that contracts stipulate final payment to be received in 30 days after the close of the conference. Contracts must also include a non-compliance clause, “a penalty of up to 15% will be imposed on any contractor who fails to comply with all terms of the contract.”

The national office is accountable for all conference income and handles registration. The national office will accept credit cards used (American Express, Visa, MasterCard, Discover). The budget will be based on a break-even point determined by the events manager in the national budget.

Publicity

Registration packets will be distributed in the spring and should include information on the site, hotel and transportation, off-site sessions, keynotes, special events, pre- or post-conference training courses, and any other training opportunities associated with the conference.

Conference Content

1. A national business meeting will be held during the conference (this meeting may be held during a single or multiple sessions at the discretion of the board and staff). Time will also be set aside for OU meetings. The committee should also set aside time slots for agency meetings and awards but not at the expense of NAI activities.
2. The majority of concurrent sessions will be from submitted proposals selected by program committee review. No speakers will be paid unless all conference participants will benefit (keynote speakers, for example). Session topics should include both techniques and successful programs in natural and cultural history, management, and research. The program committee should solicit papers in addition to putting out a general Call for Presentations, which should be available on the NAI web site prior to the preceding conference. Conference sessions should include a diverse range of topics of interest to different kinds of NAI members (i.e. natural history, cultural history, management) and include both demonstrations of skills and techniques, and examples of successful programs.
3. No program should be presented during a meal. General sessions, such as keynotes or awards, can begin after meal service has been cleared, or meal service clearing must cease during the presentation.
4. Pre-conference Training Sessions (5-12) should be scheduled before the conference and should be of reasonable cost to encourage attendance. The national office will pay 50% of the profits after expenses to training course instructors, as per contract.
5. The conference proceedings, The Interpretive Sourcebook, will be available online before the conference as part of full registration, and should follow established guidelines. Extra copies may be sold through the Association Store.

6. Exhibits should open the first evening and the following day, with a minimum of 10 hours expo-sure with at least 5 hours of exclusive time during which no other events are scheduled (such as an open-ing reception and meals or breaks in the Exhibit Hall). Exhibitors should also be encouraged to share their expertise by proposing concurrent sessions or taking part in the Learning Lounge.

Logistics

1. There should be a minimum of 15 breakout rooms for concurrent sessions, in addition to space for the conference office and the board meeting room. The majority of breakouts should have a capacity of 50-75 people theatre-style and AV equipment. Session lengths should be 60 minutes and 120 minutes long.
2. Wherever possible, the committee should use sustainable practices.

Special Events and Off-Site Sessions

1. The NAI National Conference will include a banquet, scholarship auction, off-site sessions, special evening events, and professional awards.
2. The banquet will include a presentation of professional awards.
3. A silent auction should be held before the live auction to reduce the number of items in the live auction.
4. Coach-style buses will be used for trips over thirty minutes, if feasible.
5. Registrants will have first option for field training and special events. Non-registered participants will be allowed to attend these activities on a space available basis. An adult who is registered for the conference must accompany children attending these events.
6. One afternoon or evening should be set aside for Excellence Awards (federal agency awards).