

Association of Fundraising Professionals: Chapter Education Program Planning Guide

TABLE OF CONTENTS

Introduction

The role of your chapter as an educational resource
Build a chapter toolkit

Chapter 1: Five Essential Elements of Good Education (The Education Cycle)

1. Conduct needs assessment
2. Identify learning objectives
3. Select qualified presenters
4. Build a curriculum: content and teaching tools
5. Evaluate

Chapter 2: Planning Your Chapter's Annual Educational Program

Developing your chapter's educational mission and planning team
Balancing the educational program: flexibility and focus
Planning meeting logistics

Chapter 3: Planning a Chapter Conference

Define goals and objectives
Appoint team leaders
Develop program content
Build your budget
Select a suitable site
Market your conference
Plan the registration
Obtain sponsorships and exhibitors
Execute your conference
Evaluate your conference
Wrap-up your conference

Appendices

Appendix 1: Curriculum Planning Toolkit

The Education Cycle
AFP First Course learning objectives
AFP CFRE Review Course learning objectives
AFP Fundraising Curriculum Framework
Education Committee job descriptions
Model program matrix
Model program matrix template
Chapter education program topic ideas
Programs for advanced level fundraising professionals
Program planning timeline
Sample chapter program based on AFP Curriculum Framework
Sample annual education program flyer
Ten Star Award goals

- Collaborating with colleges and universities
- Building a budget for your meetings
- Planning the venue for your chapter meetings
- Sample checklist for onsite coordinator
- Marketing chapter meetings
- Sample marketing materials

Appendix 2: Needs Assessment Toolkit

- Techniques for determining educational needs
- Chapter needs assessment guidelines
- Chapter needs assessment template

Appendix 3: Evaluation Toolkit

- Levels of program evaluation
- Sample session evaluation form
- Sample conference evaluation form

Appendix 4: Working with Speakers Toolkit

- Speaker qualifications checklist
- Sample call for programs
- Sample faculty application
- Sample speaker invitation letter
- Sample speaker confirmation
- Sample speaker guidelines

Appendix 5: Becoming a Better Speaker Toolkit

- Adult learning principles
- Writing learning objectives
- Developing lesson plans
- Developing teaching materials
- Accommodating different learning styles

Appendix 6: Planning a Successful Meeting or Conference (links to documents are below)

- Ethical considerations
- Planning checklist
- Planning timeline
- Sample presenter's agreement
- Sample commercialism/marketing policy
- AFP speaker policies
- Sample budget checklist
- Sample break-even analysis
- Sample checklist
- Environmental considerations
- Negotiation techniques
- Site inspection form
- Meeting promotion and publicity checklist
- Meeting evaluation
- Meeting guide
- Helpful books on meeting planning

Introduction

The mission of the AFP Professional Advancement Division is to support the development of philanthropic fundraising professionals through education, research and information dissemination. Division staff and volunteers pursue this mission through a variety of programs ranging from basic training through intermediate and advanced education, to initiatives in research, publication and professional certification. The goal of the division is to make available to philanthropic fundraisers, during all steps of their careers, the tools and information they need to grow both professionally and personally. Chapter educational programs are significant partners in realizing these important aims!

In support of that goal, the new *AFP Chapter Education Program Planning Guide* represents the efforts of the volunteers and staff of the entire Professional Advancement Division, as well as dozens of your colleagues in other chapters, over a period of several months. Special thanks go to the Education Planning Guide Task Force, a group of dedicated volunteers who gave many hours of their time to this project: Ellen Arnold, CFRE, Timothy Coffey, CFRE, D.C. Dreger, ACFRE, Patti Franklin, Roberta Healey, CFRE, Jill Pranger, CFRE, and Susan Walling, CFRE.

The resulting collection of information, guidelines and sample tools is intended to help you:

- Provide a framework for planning any kind of educational program, from a single luncheon presentation to an entire conference
- Avoid reinventing the wheel, by using sample checklists, budgets, letters and program ideas provided by other chapters
- Repeat successes and avoid mistakes with “pearls of wisdom” from the field
- Develop high quality professional continuing education programs for your chapter
- Successfully implement logistics for producing a flawless meeting or conference

The Role of Your Chapter as an Educational Resource

Chapters are instrumental as educational resources in several ways: first, they serve as an extension of AFP Headquarters by making its programs, such as the First Course, CFRE Review Course, Essentials of Fundraising series, and Web/Audioconference series, available to members all over the world.

Second, as AFP recently discovered in numerous membership surveys, members expect most hands-on learning and networking to come at the local level--from the chapter. So, chapters must act as providers of their own, original programming as well, which can be tailored to the needs of their communities.

Third, chapters have an opportunity to exemplify in all of their programs the principles, values and culture of fundraising through local leadership. A comprehensive educational program addresses such topics as philanthropic traditions and trends, ethics and diversity in fundraising.

Finally, a successful program must be executed flawlessly. A well run, logistically sound meeting or conference contributes significantly to the success of the program. The purpose of this guide is to assist the chapter in fulfilling all of these important roles.

Build a Chapter Toolkit

It is highly recommended that you build your own toolkit by inserting your customized tools, plus any other documents that have served you well in the past. Over time, you will have created a history of your chapter's educational program and meeting or conference logistics that can be passed to your successors, year by year. New tools will be periodically added to the online toolkit, so check in often to keep your toolkit up-to-date.

In addition to quick-reference models and samples, throughout the guide you'll find essential resources for building or enhancing your chapter's total educational program. Use these tips to assess your ongoing program or to lay a solid foundation for new offerings.

Chapter 1 Five Essential Elements of Good Education (the Education Cycle)

Good education is built on five essential elements, making up a circular process that begins with *discovering what learners need to know* and ends with *discovering whether or not they learned it*. In between, speakers are engaged and methods developed that match the needs and are calculated to teach the missing skills. Then the cycle begins again with feedback from presenters and participants about new or continuing learning needs.

View a graphic depiction of the Education Cycle (*Appendix 1*).

1. Conduct a Needs Assessment

Before you can plan a relevant educational program you must go to your potential participants and determine what they need to learn from it. Usually this is done with a mail or telephone survey, but you also can use special focus groups or other methods, either alone or combined.

Whatever method you choose, remember that a “learning needs assessment” has a different objective than a “marketing analysis.” The latter asks whether there is sufficient *interest* in the activity to achieve a revenue goal; the former calculates a *measurable need* to be met through the teaching process. Think of it as the answer to the question, “What is the gap between what the learners *know now* and what they *need* to know to do the job?”

More about needs assessments (Appendix 2)

Once the needs assessment has been conducted, evaluate the data to identify the major segments of your constituency.

- Do you have a lot of beginners, or perhaps an under-used corps of advanced members?
- Do your members represent grassroots organizations, or are many of them consultants?

Then, look not only at which topics are most frequently requested, but also at *who* is requesting them to determine what level or aspect of those topics are needed.

Finally, look for common concerns among open-ended responses: What are your members' plans and hopes for their careers, the community and the future of philanthropy?

2. Identify Learning Objectives

The next step is to state in measurable terms, what specific skills learners can be expected to acquire by attending a learning activity. *These should be linked directly to data gathered in the needs assessment.* It is important to communicate these to learners, both in promotional pieces and at the beginning of the activity. Knowing what's expected helps learners to make informed decisions about what to attend, and to have control of their own learning experience.

More about learning objectives (Appendix 5)

Sample learning objectives (Appendix 1)

3. Select Qualified Presenters

Knowing *how to teach* is at least as important as having expertise on the assigned topic. When recruiting speakers, it is good to have specific qualifications in mind for both, such as 'X' years of practice in the subject field and/or a certain level of previous speaker ratings. If the program is to have an unusual format or an advanced topic, successful previous teaching experience in that particular format is a plus.

The basic steps in recruiting qualified presenters are the following:

- Identify any pre-determined teaching parameters for the program; i.e., the scope of the content; practice level of the audience; complexity of learning objectives; and the format (hands-on workshop, lecture, audioconference, roundtable, etc.).
- Compile a list of qualifications for presenting particular content, objectives and format.
- Gather information from potential presenters (by invitation and/or a Call for Presentations), including proposed teaching outlines for the planned session.
- Make a final selection based on qualifications and the “fit” to your needs assessment.
- Inform presenters of the program evaluation process prior to the session, and share evaluation results afterward.

More about selecting qualified speakers (Appendix 4)

Some sources good speakers include:

- AFP Resource Center. The Resource Center keeps a list of topics, speakers and ratings from past AFP International Conferences, which can be sorted by region. Call 800 688-FIND for more information.
- AFP Faculty Training Academy graduates. Every other year AFP offers a 2 1/2-day Faculty Training Academy to train presenters for AFP courses. Graduates of the Academy are available to teach the AFP First Course or CFRE Review Course, and to present “How to Be an Effective Presenter” sessions for chapters. For a list of FTA graduates, contact the AFP Professional Advancement Division at 800-666-3863 or check the AFP website at <http://afpnet.org/Professional/content.cfm?ItemNumber=772>.
- Local universities. They may be a good source of prospective speakers on topics related to fundraising, nonprofit management and leadership, financial planning, tax and legal issues and technology.
- Your chapter members. Create opportunities for interested chapter members to gain experience as presenters by inviting them to facilitate roundtable discussions or other informal presentations at monthly meetings. Share with them materials on how to be a better speaker.

More about becoming a better speaker (Appendix 5)

4. Build a Curriculum: Content and Teaching Tools

Develop teaching materials that allow learners to retain the information presented. The way the material is delivered is important as well. These methods and materials should be linked directly to learning objectives identified through the needs assessment and should be consistent with adult learning principles.

Most often the instructors you engage will be doing this work; however, that does not let planners off the hook. Speakers should be made aware of (or even participate in) the needs assessment and its results, and of the learning objectives identified for the activity. These are their “marching orders,” for which they are to be held accountable to the learners. Always ask to see an outline of the proposed content and teaching plan to make sure it fits your program plan.

Encourage speakers to use the AFP Fundraising Curriculum Framework as a guide in their planning. The Framework, based on AFP’s 2002 Practice Analysis, lists the roles and responsibilities of fundraising professionals and offers suggested learning objectives and learning activities to develop the knowledge and skills needed by fundraising professionals to fulfill these responsibilities.

More about curriculum development (Appendix 1)

More about learning principles (Appendix 5)

5. Evaluate

An effective evaluation process will give you answers to the following questions:

- Were the learning objectives met?
- What did attendees learn that will help them be better fundraisers?
- Were there weaknesses in the program, the materials or the methods that need to be addressed?
- Would you put on this event again?
- Would you ask this speaker back, or recommend him/her to another chapter?
- What new or follow-up activities would benefit your members?

Don't forget the most important part of the evaluation process: start the cycle again by plugging evaluation data into the original needs assessment. In this way, your chapter programming can be responsive to member needs while remaining consistent with the chapter's broad mission and goals.

More about evaluation principles, methods and tools (Appendix 3)

Chapter 2 Planning Your Chapter's Annual Educational Program

1. Developing Your Chapter's Educational Mission and Planning Team

Having a written statement of educational purpose--your "big picture"--is essential to reaching your chapter program goals. It allows you not only to focus your efforts *en route*, but also to evaluate the effectiveness of your programs at the end of the year.

- **First, assemble and charge an education committee.** Have written job descriptions for the chair and other committee positions. Sub-committees should similarly be charged with specific objectives. The committee should determine early how it will work, how often it will meet, and what it will accomplish during the year. Do this even if the committee is only one or two people!
- *More on Education Committee Job Descriptions (Appendix 1)*
- **Next, get focused.** Write down your chapter's broad educational objectives for one to three years ahead. Will your main focus be to act as a community resource, encourage members to pursue professional certification or provide training for beginners to get them on the right foot? Think about how the objectives will be reconciled or integrated with other priorities, such as member recruitment, revenue enhancement or public relations.
- **Develop an action plan.** Decide on events/activities for reaching your objectives, and then create a written work plan and time line for each event/activity. How many and what kind of programs will you offer? Will the chapter develop its own integrated educational program? Or, will you collaborate with other providers such as a local university to enhance opportunities for members? Designate individuals who will be responsible for working on specific aspects of the action plan.
- **Don't forget educational standards.** Adherence to established standards of professional education will ensure the educational quality of your chapter's programming. How will adult learning principles be incorporated into planning? How will session topics and speakers be selected to ensure that the needed learning will actually take place? How will you create a learning-friendly environment?

2. Balancing the Educational Program: Flexibility and Focus

There is no universal "correct" program plan. You only can succeed if you assess and periodically reassess learning needs and ensure a balance of formats, teaching styles, presenter backgrounds and program goals. In any given month, you will not please all prospective learners; but by focusing on the long term goal of balance for all programming aspects, however, you will provide something for everyone *over time*.

a. Flexibility. In addition to your structured planning, be flexible. If a national or international trainer/author/speaker happens to be in your area for an agency or client, he/she may be available at a very reasonable rate. Be open to including him/her on your program. If changing political, economic or community factors mean you need to address a "crisis" or unexpected topic, postpone the planned program and develop a forum to address the local issue. Your foresight and flexibility will allow you and your chapter to support the development of philanthropic fundraising professionals through high quality, learner-centered education.

b. Model Program Matrix. The Model Program Matrix will give you a comprehensive view of a program specifically designed to deliver maximum programming to the most carefully defined member segments. By using the template Model Program Matrix, you can record your own programs and analyze where you may want to add or modify plans.

More on the Program Planning (Appendix 1)

c. AFP Fundraising Curriculum Framework. Use the AFP Fundraising Curriculum Framework, based on AFP's 2002 Practive Analysis, as a guide in your planning. The Framework provides suggested learning activities for various fundraising roles and responsibilities.

More on the AFP Fundraising Curriculum Framework

<http://www.afpnet.org/Professional/content.cfm?ItemNumber=1233>

d. Certification Programs. Other sources of ideas for educational programming are the Certified Fund Raising Executive (CFRE) and Advanced Certified Fund Raising Executive (ACFRE) programs. Both certification programs publish candidate guidelines, with outlines of the content areas (domains) covered by their respective examinations. The outlines include the proportionate weight given to areas tested. Together with the study bibliographies provided in the guidelines, the outlines offer a framework for assessing the needs of potential examinees.

In addition to its test outline, the ACFRE board has published guidelines to identify programs that meet the definition of advanced fundraising education in the application's leadership, management, and ethics categories. Chapters are encouraged to refer to this document when developing programs targeted to advanced professionals.

More on the CFRE program www.cfre.org

More on AFP's ACFRE program

<http://www.afpnet.org/Professional/ProgramDetail.cfm?itemnumber=4054>

e. Chapter Ten Star Award. Consider the Chapter Ten Star Award program as a source of ideas for educational programming. Every chapter that meets 10 of the 15 outlined criteria is eligible for the award, which honors chapters that have demonstrated a deep commitment to the goals and ideals of AFP.

More on the Ten Star Award program (Appendix 1)

f. AFP Courses. Plan to host one or more AFP courses:

- **First Course in Fundraising** is a 2-day overview of the development function targeted primarily to newer fundraisers. It includes case studies and group projects on annual giving, major gifts, working with volunteers, obtaining grant support, and operating a development office.
- **CFRE Review Course** is a 2-day overview of fundraising concepts and techniques targeted to fundraisers at the five-year level. Components include prospect research, marketing and communications for fundraising and development, developing a comprehensive solicitation program, building and sustaining relationships, securing the gift, volunteer involvement, management, and accountability.. Many individuals take the AFP CFRE Review course to review for the CFRE Certification Examination.
- **Essentials of Fundraising** is a series of five 3-hour workshops to help develop basic fundraising skills. It is designed to economically provide the essentials of fundraising to small organizations and individuals new to the field. It may be used as a marketing tool to encourage those who enroll to join AFP. The five modules are: Starting a Development Office, Annual Fund, Grantseeking, Individual Major Gifts Fundraising Board and Volunteer Development.
- **Fundamentals of Fundraising.** The new AFP Fundamentals of Fundraising Course will be available for AFP Chapters to offer starting April 2010. This new course was developed with a foundation from the Essentials of Fundraising Program and the First Course and is composed of seven modules that have

been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day.

- **Web/Audioconferences** are an economical way to provide a 90-minute program for your members. Several programs are offered each year through AFP International Headquarters on a variety of current topics. No special equipment is required to host an audioconference –only a phone or speakerphone.

More on AFP course offerings <http://www.afpnet.org/Professional/?&navItemNumber=504>

g. Collaborative Programs. Consider developing collaborative programs with local colleges and universities.

More on collaborating with other colleges and universities (Appendix 1)

3. Planning Meeting Logistics

- **Develop a budget.** A well-administered budget enables you to accurately project and monitor income and expenses, track cash flow and determine where cost controls may be needed. It also provides essential information for negotiating intelligently with suppliers and forecasting the return on investment of future meetings.
- **Choose the meeting facility.** A meeting's location sets the tone by providing an atmosphere that complements the meeting goals and objectives. Select a facility that is an appropriate property for the type of meeting you're planning. A luncheon meeting or three-hour seminar requires less space, and less-complicated arrangements, than a large, multi-day program, which will require several meeting rooms, dining facilities and sleeping rooms.
- **Market the program.** An integrated marketing plan should support your chapter's educational mission. It should include analysis of your target audiences, development of your message and suggested strategies and tactics.

More on developing budget, selecting meeting facilities, and marketing (Appendix 1 and Chapter 3)

Chapter 3 Planning a Chapter Conference

A successful chapter conference (Fundraising Day, National Philanthropy Day, etc.) can be one of the most effective membership benefits of any chapter's products or services. However, planning conference is an enormously complex undertaking—one that requires meticulous attention to details, daily decisions on a wide range of important things and the ability to juggle a great many balls at the same time. This document is not meant to be a detailed checklist. It should serve as a guide to help develop your own chapter conference checklist, based on the purpose and scope of your conference.

1. Define the Goals and Objectives

Setting strategic goals and tactical objectives will make the rest of the process easier. If you can get everyone on your chapter board or planning committee to agree on precisely what is to be accomplished, there will be far less "last minute run around errands," which often leads to extra work, higher costs and lower ultimate achievement. Setting your goals and developing attainable, measurable, timely objectives that support the chapter's mission are essential to a successful conference. Research and evaluation should answer questions about everything from program content and networking opportunities to location and fees.

- What is the board's vision or goal for the conference?
- What are the expected conference outcomes?
- Who will attend?
- What is the purpose?
- When will the conference be held?
- How will you build a budget?

More on defining goals and objectives:

Ethical considerations www.pcma.org/pdf/615.pdf

Planning checklist www.pcma.org/pdf/planning_checklist.pdf

Planning timeline www.pcma.org/pdf/613.pdf

2. Appoint the Appropriate Team Leaders

Finding the right conference committee chairs to carry out the instructions of the chapter planning committee or board is most important. In order to successfully plan your conference you will need a team of people who:

- share the board's understanding of the goals
- are flexible and willing to compromise
- can think for themselves and make decisions
- detail oriented and doers rather than strategic thinkers

You must have confidence in their abilities and know that they are up to the job. These committee chairs will help produce a conference that is profitable and on target.

Consider the following when selecting the committee chair:

- Define the job
- Determine job qualifications
- Develop a list of potential candidates
- Interview the candidates
- Appoint the team leader

3. Develop Program Content

The information you gather from your attendee research, in addition to being the basis for your goals and objectives, will help you plan program content. If this is the first time you are having a conference then survey your members.

- Consider learning objectives
- Define topics
- Develop formats
- Select speakers
- Design exhibit program

More on developing program content:

Sample presenters agreement www.pcma.org/pdf/621.pdf

Sample commercialism/marketing policy www.pcma.org/pdf/623.pdf

4. Build Your Budget

Plan for your chapter conference to be profitable! The revenue generated can be invested in your chapter's programming and professional growth.

Build your meeting budget by analyzing the actual figures from last year's bills. Compare the actual figures to last years projected figures and note any variances.

If you have no financial history, then you must build a budget based on your estimates of potential income and likely expenses.

- Clarify revenue assumptions
- Clarify expense assumptions

The chapter conference should make net revenue for your chapter—revenue that you can put back into the chapter for future programs, products and services.

More on budgeting:

Sample budget checklist

<http://www.pcma.org/resources/resources/checklists/check/budgetcheck2.asp>

Sample break-even analysis www.pcma.org/pdf/632.pdf

5. Select a Suitable Site

The conference goals should guide the site selection process. Based on the stated goals, you can begin to define your conference requirements in terms of space, dates, rates and services. This process requires you to know attendee demographics, the program and an approximate budget.

The meeting rooms are extremely important to the success of your meeting. They set the tone—business, social and educational. Coordinate closely with the facility staff to be sure that the chapter conference will “fit” into the facility and to make the meetings both comfortable and productive.

- Define conference requirements

- Generate conference specification sheets
- Prepare a short list of prospective sites
- Match the conference purpose to the site
- Identify services that potential sites will need
- Inspect sites in person
- Confirm that the site complies is accessible for physically challenged attendees
- Confirm transportation and parking options
- Stay at the facility and use the services
- Negotiate the contract

More on site selection:

Sample site selection checklist www.pcma.org/pdf/614.pdf

Environmental considerations www.pcma.org/pdf/611.pdf

Negotiation techniques www.pcma.org/pdf/618.pdf

Site inspection form www.pcma.org/pdf/site_inspection.pdf

6. Market Your Conference

Marketing involves identifying member wants and needs, and developing a plan to meet those wants and needs. Marketing provides the structure for developing an event that attracts members and fulfills their expectations. An integrated marketing plan should support and be consistent with your market research, program planning and development, advertising, promotions and publicity. It should include:

- Target audience analysis (member segments)
- Competitive analysis
- Goals and objectives
- Message development
- Budget
- Promotion strategy
- Evaluation

Use various media to promote chapter events:

- Advertising (print, broadcast)
- Internet (email, newsletters, chapter web site)
- Promotions (direct mail, contests)
- Publicity (media relations, press kits)
- Sales (telemarketing, direct sales)
- Sponsorships (organizations, publications)
- On-site design and décor (WOW factor)

More on marketing:

Meeting promotion and publicity checklist www.pcma.org/pdf/meeting_promotion.pdf

7. Plan the Registration Process

Chapter members and non-members typically get their first impression of the conference through the registration process. As you develop a pre-registration form you must decide what information you want from your conference attendees. Depending on the size of the conference, this may range from name and contact information to detailed attendee demographics.

Attendees are your hottest prospects to market to for future meetings. If your chapter is moving toward database marketing, you should collect as much demographic data as possible.

The registration form should include:

- Attendee contact information
- Badge information
- Demographic information
- Event ticket information
- Payment information
- Conference policies and procedures
- Hotel information
- Special needs

Registration is the nerve center of the conference--the place where attendees go on-site to ask questions. It includes:

- Pre-registration
- Online registration
- On-site registration
- Setup and services
- Lead retrieval
- Exhibitor registration

8. Obtain Sponsorships and Exhibitors

If your chapter is just breaking even on your conference, you may wish to consider how non-registration revenue could play an important part in raising your net revenues. Exhibits, advertising and sponsorships provide significant financial support with very little extra expense involved. The exhibit and sponsorship budget should be a sub-set of the overall conference budget. Some things to consider include:

- Book exhibit hall or ballroom
- Develop floor plans
- Write exhibitor and sponsor prospectus
- Prepare exhibitor manual
- Lead identification
- Prepare sales calls
- Choose sponsor packages
- Develop exhibitor and sponsor agreements

9. Execute Your Conference

For your chapter to execute a flawless conference you will need to create a specification book. This book is sometimes called a staging guide or the meeting bible. It is a tool that organizes and consolidates all of the conference logistics. You can then copy and send all or part of the specification sheets (event orders) to your vendors and suppliers. The book will document every decision made and every detail confirmed with your vendors and suppliers. It should cover meeting dates and any pre-conference and post-conference programs that require advance preparations. To create and use the specification book you will need to:

- Create and distribute planning timeline
- Create a specification sheet (event order) for every program at the conference
- Record and date information on the specification sheets as it is received
- Distribute specification sheets to suppliers and vendors one month out
- Date and distribute revisions
- Use specification book to conduct pre-convention meeting
- Refer to specification book on-site
- Save book as a template for next year

Arrange the book with tabs for easy referral.

- General information including contact information, dates, place, number of attendees, etc
- Financial information
- List of vendors and suppliers with contact information
- Specification sheets in chronological order
- Contracts
- Sponsor agreements
- Exhibit information

When on-site, the specification book becomes the final authority on the conference. The book should provide the answers to most questions that arise before and during the conference.

10. Evaluate Your Conference

Evaluation of the chapter conference should be viewed as an ongoing process, not just a routine exercise completed at the end of the conference. Evaluation is a vital tool to help you record both your successes and challenges -- it becomes a resource to use for future meetings.

Several groups should be involved with the evaluation process:

- First, the conference planning committee should evaluate every area of the conference through observations and taking notes.
- Next, the attendees, exhibitors and sponsors should each fill out an evaluation form specific to their participation.
- Finally, the facility staff should report on the conference at a post-conference meeting.

Consolidate all data, report to the board and pass to next year's conference chair in the form of a final report.

Considerations for your conference evaluation include:

- Define what success is
- Decide what will be evaluated
- Establish when to conduct the evaluation
- Determine what data are collected
- Craft the questions
- Choose the rating scale
- Design the questionnaire
- Administer the questionnaire
- Analyze the results

- Distribute results to speakers, chapter board, planning committee and next year's chair

More on conference evaluations:

Meeting evaluation www.pcma.org/pdf/617.pdf

11. Wrap up Your Conference

Passing the “history” of the conference to the next conference planning committee is vital to the success of future meetings.

- The final report will help determine the goals and objectives for next year's conference.
- The specification book documents all of the details of the event.
- The final bill will determine if your chapter stayed within budget and made money.

More on meeting planning (Appendix 6):

Meeting guide www.mmaweb.com/meetings/

Books on meeting planning are available through the AFP online bookstore at <http://www.afpnet.org/Marketplace/?navItemNumber=507>.