



ARMA Southwest Region Conferences - Host Chapter Policies & Procedures

Purpose

It is the intent of the ARMA Southwest Region (SWR) to hold two conferences each year. The annual conferences are as follows:

1. The SWR Leadership Conference is designed to help equip and empower chapter leaders. It is typically held in late July of each year so that chapter leaders have sufficient time to begin planning for their new chapter year armed with the information they have learned from this conference.
2. The SWR CRM Conference is held to assist individuals who are interested in becoming a CRM or assisting current CRM's with continuing education. This conference is typically held in the Spring.

These conferences are typically held in different locations near a region chapter that serves as "Host Chapter" for the conference. In partnership with the Region's leadership, the local host chapter assists with producing a quality conference for everyone involved.

Any questions concerning this policy and its interpretation should be directed to the Region Manager or your chapter's Region Coordinator.

Benefits of Being a Host Chapter

- Opportunity to feature your chapter and showcase your city within the region.
- Gain experience working with region leadership to produce the event.
- Receive up to four (4) discounted registrations for chapter members who serve as conference volunteers.
- Benefit from first hand networking with other region members and ARMA HQ leaders.

Event/Venue Contracts

All contracts for the hotel and venues associated with these conferences must be written between ARMA Southwest Region and the hotel or venue. The contract must be signed by the SWR Region Manager or a Region Officer authorized by the Region Manager to sign on behalf of the region.

Planning Meetings

The Region officers will conduct regular meetings prior to the event with representatives from the host chapter to discuss the event and review the responsibilities of the host chapter and the region along with any other items deemed appropriate by those in attendance to facilitate the planning of the event being hosted. The Region officers and the host chapter representatives will also hold a post-event session to discuss the event and provide a preliminary report on the event. A final report will be provided to host chapters to aid them in planning these events.

Event Activity Reports

To ensure that communications remain open and flowing, the host chapter shall submit brief activity reports on the progress of the event's planning and items for discussion or decisions required from the region. This activity report should be transmitted to the region manager on a monthly basis. The region manager will disseminate the information to the region team as needed. The Region will also communicate on-going activity regarding event planning with the host chapter.

During the final sixty (60) days prior to the event, the region manager will set up conference calls, as required, to go over event details and finalize open issues in order to ensure the successful execution of the plans for holding the event. Following the conference, the region treasurer shall submit a report to the region team. This report will be due no later than sixty (60) days from the last day of the event. It shall include: number of attendees, a schedule/program from the event, the expenses and income for the event, speaker evaluations and overall conference evaluations.

The region manager shall submit a final summary report to the host chapter. The summary report will also be available to the other SWR Chapter board members upon request.

Host Chapter Responsibilities

The host chapter will explore venue options and assist in securing a venue for the conference by making recommendations to the region leadership team. If the meeting venue is not a hotel, then the venue should be within reasonable walking distance from the housing accommodations.

1. Transportation

Transportation to and from the local airport should be free or have low cost shuttle service available to attendees.

2. Meeting Space/Venue

Hotel meeting rooms should be negotiated as free of charge based on the use of catering services or number of booked rooms. In addition, every effort should be made to secure a complimentary suite to serve as a hospitality suite in the event that funds are secured by a sponsor to facilitate a hospitality suite. The Region Manager will determine who will occupy and host the hospitality suite if applicable.

Every effort should be made to keep housing costs down to ensure the conference will be more affordable for attendees. It is also recommended that the host committee negotiate with the housing provider to receive complimentary room nights based on a one room for every 20 to 30 rooms booked. Non-meeting venues should be secured at no cost or at a reasonable cost with the ability to bring in food for no extra fees and have ample room for classroom seating.

3. Audio/Visual and other Equipment

The Hotel or meeting venue should allow for the region to bring in and use A/V equipment it has secured and have the ability for live Internet connection. The meeting venue should also have microphone and speaker equipment provided or at a reasonable cost. The host chapter is asked to provide, if possible, any A/V equipment such as LCD projectors, laptops and screens in order to keep conference costs at a minimum.

4. Optional Evening Event Planning

The host chapter will explore a possible outing event for one night during the conference. In partnership with the region leadership, an event will be selected from the host chapter's recommendations. The total cost of the event, including any transportation, should not exceed \$50.00 per person. Any function exceeding \$50.00 per person must first be approved by the Region Manager before committing to the event. The optional event is not included in the conference registration fee. The host chapter is responsible for coordinating this event. Conference attendees will be asked to pay in advance for the event.

An Optional Event is customary for the SWR Leadership Conference; however, an Optional Event is not necessary for the CRM Conference.

5. Registration

The host chapter will provide the manpower to manage the registration table for the conference. All payments for registration and/or an optional event are to be paid to: ARMA SW Region.

6. Donations, Sponsorships & Speaker Gifts

The host chapter is requested to seek donated items such as notepads, pens, local tourist information, location maps, goodie bag items, etc. to be included in registration packets.

The host chapter and the region team will solicit sponsorships from vendors to help lessen conference costs to the region. In addition, the region manager will solicit sponsorships from each chapter president. A form will be made available to distinguish specific donation options.

The host chapter is also obligated to suggest “Thank You” gifts to give to each speaker. The selection of gifts is to be presented to the Region Manager and a selection to be made by the host chapter and region team.

Financial Responsibilities

The SWR is responsible for the following costs associated with both conferences:

- Food & beverage outlined in any contract signed by the Region Manager
- Additional audio/video equipment above and beyond any that are donated
- Additional supply costs such as copy of handouts/evaluations, office supplies, name badges, etc. that is above and beyond any that are donated
- Speaker gifts and associated costs such as bags, wrapping, etc above and beyond any that are donated
- Any other miscellaneous charges in any contract signed by the Region Manager in the event minimum requirements are not met-ie. minimum attendance, etc.

The SWR is **NOT** responsible for the following costs associated with both conferences:

- Any optional event, including F&B, not pre-approved by the Region Manager
- Any preconference or post conference event, including F&B, not pre-approved by the Region Manager
- Any group transportation not pre-approved by the Region Manager

Both the SWR Leadership Conference and the SWR CRM Conference are not intended to be for profit events but rather to provide on-going education for all SW Region members. Any profit generated by the conferences will be kept by the SWR and distributed as follows:

- 50% will go into the SWR Travel Fund for use by the region team to offset travel expenses not covered by ARMA International in the normal course of business-ie. chapter visits.
- 50% will go into the SWR general operating fund to cover cost such as PO Box rental, office supplies, credit card processing fees, etc.

Scheduling and Content of Conferences

The host chapter must not plan any other chapter-sponsored workshop, seminar or meeting to coincide with any SWR conference unless pre-approval has been given by the Region Manager. The host chapter can hold their chapter meeting or social event the day prior to or after the region's conference and invite conference attendees and speakers to attend.

The host chapter of the CRM conference is to assist the region in the selection of sessions and presenters while following the ICRM policy and guidelines (www.icrm.org). Chapters and the host chapter are encouraged to make recommendations for speakers and topics to be presented. Every effort should be made to draw upon qualified local talent to keep conference costs down. Final decisions relating to content and presenters reside with the Region's Manager and Coordinators, taking into account input from the chapters.

Host Chapter Selection Process

Regional Leadership Conference

Yearly at the SWR Leadership Conference, the region's chapters will select the Leadership Conference's Host Chapter for the next available conference year. Each Chapter interested in serving as a host chapter for the leadership conference, should be prepared to give a 5-10 minute presentation to the conference attendees highlighting the chapter's desire to host the conference, the area's logistical feasibility such as airport, ground transportation, cost effective venues and entertainment opportunities. Attendees will then vote to determine the next Host Chapter. After the Leadership Conference ends, the successful chapter should be prepared to meet directly with the region management and representative of the previous host chapter to discuss the next conference.

Regional CRM Conference

Any chapter interested in serving as host chapter for the Region's CRM Conference should express their interest to the Region's Manager at least two weeks prior to the Region's Leadership Conference. Any interested chapter should also make arrangements for at least one representative from the chapter to meet with the region for the pre-planning meeting.

In the event that more than one chapter expresses an interest in hosting the CRM Conference, the region leadership team may request each chapter make a 2-3 minute presentation to the leadership team on why their chapter is best suited to host the next CRM Conference.