



**International Association of
Administrative Professionals®**

The Alabama Division, Inc. of IAAP

ALABAMA DIVISION PROFESSIONAL EDUCATION AND STUDENT CONFERENCE (PESC) PLANNING GUIDELINES

INDEX

	<u>Page</u>
Purpose	2
Scheduling	3
Finances	4
Coordinators	6
Committees	7
Agenda	14
Overall Timeline	15
Student Conference Timeline	17
Conference Requirements	20
Information Required for Agreement and Contract Prep	22
Meeting Space Guides	23
Sample Budget	24
Division PESC Voucher	25
Division PESC Letterhead	26

This document is intended as a guideline and may vary from conference to conference.

DIVISION PESC

The Division PESC is conducted by the Alabama Division President.

PURPOSE

1. To bring IAAP members together to discuss activities and direction of the association and profession.
2. To participate in educational activities and exchange information about Chapter and Division programs and projects which further the objectives of IAAP; i.e. to provide for personal and professional development of members and to increase membership retention and recruitment.
3. Provide scholarship opportunities through presentations and testing.
3. To provide additional opportunities for professional networking.
4. To share resources developed by IAAP Headquarters.

DIVISION BOARD AND DIVISION PRESIDENT

The Division Board is responsible for and in charge of all functions of the Division PESC. The Division President, as chairman of the conference, has final approval on all arrangements, plans, etc. for all aspects of the conference.

1. Confirms the appointment of the Coordinators. The Division President has the authority to re-appoint Coordinators if she/he feels that they are not fulfilling their duties.
2. Ensures that the Division PESC Coordinators have received the most current Planning Guidelines for the Conference.
3. Approves the budget, including registration fee.
4. Approves all plans made by host unit, including registration materials and any advance mailings.
5. Prepares Division PESC agenda.
6. Approves physical arrangements for general sessions and reserved seating.
7. The Division President presides at the Conference and should recognize all Special Guests (Association Dignitaries and International officers/personnel, Past Division Presidents, Int'l Reps, etc.).

SCHEDULING

The Division President-Elect will select the coordinator and location for the year they serve as Division President. Coordinator will be selected approximately 1 year prior to hosting.

The Alabama Division Bylaws and Standing Rules specify that the Division PESC shall be held in February or March of each year. In selecting a date, special attention should be paid to avoid scheduling during holiday weekends and school spring break timing.

Meeting Room Space Requirements are based upon the agenda, but typically are as follows:

- Friday (classroom seating) – Presentations/Testing (morning) and Seminar (afternoon)
- Friday (reception) – Networking Social
- Saturday (classroom seating) – Educational Session – make sure space is available for Ways & Means tables and Division Fundraisers
- Saturday (banquet seating) – Breakfast (optional), Recognition Luncheon

Site Visit

- a. Schedule a personal visit to the hotel(s) and/or conference centers you are considering.
- b. Basic goal is to determine how well the objective can be accomplished at the facility.
- c. Assess everything from the general condition to attitude of the personnel.

Contract should contain all items listed in Agreement and Contract Preparation. Contract should be reviewed and approved by Division Board and Coordinators and then should be reviewed by IAAP Convention and Meetings Manager prior to signing. Once approved, coordinator should contract with selected facility.

OVERALL TIMELINE (May vary by conference at the discretion of the Division President)

<u>Timeframe</u>	<u>Activity</u>	<u>Responsible</u>
Ongoing	• Provide updates to Division President	Coordinators
16 months before	• Select coordinator and location for upcoming Conference.	Division President-Elect (PE)
13-15 months before	• Prepare Update to the Division Board on all activities • Provide preliminary facility contracts to Division Board for review – once approved sign contract • Provide list of committee chairmen to Division Board	Coordinators
13 months before	• Hold Committee Meetings, identify duties delegated by Coordinator to committee chairmen	Coordinators
12 months before	• Extend invitation at Division PESC • Begin preliminary planning and fundraising • Present Division PESC Budget to Division Board	Coordinators
	• Solicit committee volunteers	Committee Chairmen
10 months before	• Transfer Division Account to new Treasurer and make sure there are 2 signatures required for all checks.	Coordinators/ Finance Chairman

8-9 months before Division Meeting in June)	<ul style="list-style-type: none"> •Extend invitation to attend Division PESC (providing as much information as possible) 	Coordinators
5-7 months before	<ul style="list-style-type: none"> •Provide draft of registration materials to Division President for approval (including student presentation question). •Once approved, submit to Division Website Director for posting. 	Invitation Committee
	<ul style="list-style-type: none"> •Send preliminary information concerning Conference to Division Board, Chapter Presidents and MALs. 	Publicity Committee
	<ul style="list-style-type: none"> •Determine Program Book setup and arrange for printing (or request donation of printing) 	Program Book Chairman
	<ul style="list-style-type: none"> •Confirm speakers and request CEUs 	Seminar Chairman
	<ul style="list-style-type: none"> •Obtain speaker bios, etc. for Conference Invitation and introductions 	Division Student Chapter Program Chairman; Seminar Chairman; Luncheon Chairman
1-3 months before (Division Meeting) 4-6 months before (Division Leadership Advance)	<ul style="list-style-type: none"> •Extend invitation to attend Division PESC (providing as much information as possible) 	Coordinators
3 months before	<ul style="list-style-type: none"> •Obtain mailing labels from Headquarters for all IAAP members in Alabama (Division President must sign official request form). •Finalize registration materials and arrange for printing 	Invitation Committee
	<ul style="list-style-type: none"> •Update Ways and Means Reservation form and submit to Division Website Director for posting 	Ways and Means Committee
2 months before	<ul style="list-style-type: none"> •Mail invitation information to all members in Division •Submit final invitation to Division Website Director for posting 	Invitation Committee
	<ul style="list-style-type: none"> ▪Provide final meeting room set ups, requests for equipment and props, and other pertinent details concerning Conference to hotel/meeting facility. 	Administration Committee
1 month before	<ul style="list-style-type: none"> •Arrange for printing of Program Book 	Program Book Committee
	<ul style="list-style-type: none"> •Coordinate with Division Treasurer to Open Credit Card Account 	Finance Committee
	Send letters to Conference speakers, and VIPs with details of location and other information to facilitate their arrival and departure	Individual Committee Chairs
2 weeks before	<ul style="list-style-type: none"> •Prepare registration packets for attendees 	Registration Committee
	<ul style="list-style-type: none"> •Prepare participant bags for attendees 	Participant Bag Committee

	<ul style="list-style-type: none"> • Review all meeting arrangements with Facility Coordinator and make adjustments as necessary. 	Coordinators
	<ul style="list-style-type: none"> • Finalize Agenda 	Division President
1 week before	<ul style="list-style-type: none"> • Confirm attendance with hotel for food guarantee 	Coordinators
10 days after	<ul style="list-style-type: none"> • Ensures CEU Reports are submitted to HQ • Provides Division Board and seminar speakers with evaluation summary 	Seminar Committee
2 weeks after	<ul style="list-style-type: none"> • Provides Division Board with Conference evaluation summary 	Coordinators
1 month after	<ul style="list-style-type: none"> • Coordinate with Division Treasurer to Close Credit Card Account (sooner if possible) 	Finance Committee
30 days after	<ul style="list-style-type: none"> • Transfer Financial Records to Division Audit Committee 	Finance Committee
2 months after	<ul style="list-style-type: none"> • Pass Conference files to next Coordinator (sooner if possible) 	Coordinators
	<ul style="list-style-type: none"> • Submit audited financial statement to Division Board • Disburse profit to Division Treasurer • Transfer checking account to next Coordinator 	Finance Committee

**STUDENT CONFERENCE TIMELINE (Coordinated by Division Student Chapter Chairman)
(May vary by conference at the discretion of the Division President)**

PESC coordinators set the conference dates approximately 1 year in advance

Timeframe	Activity
Ongoing	<ul style="list-style-type: none"> • Provide updates to Division President
9 months before PESC (at Division Meeting)	<ul style="list-style-type: none"> • Find out who is coordinating PESC and make contact about dates and location. • Begin preliminary planning and determine what fundraising project(s) will be for PESC and Division Meeting and start collecting/soliciting donations for table.
8 Months before PESC (at Division Meeting)	<ul style="list-style-type: none"> • Try to meet with PESC Coordinator at Division Meeting. • Start search for speaker for 2-hour Friday seminar (no money budgeted). • Obtain Student Conference files from previous chair. • Prepare Update to PESC Chair for submission to the Division Board on all activities. • Provide a list of committee members to PESC Chair for presentation to Division Board.
7-8 months before PESC	<ul style="list-style-type: none"> • Ensure that Student Conference information is included in the Invitation (seminar topic, seminar speaker bio w/photo if available, testing and presentation information and question). • Coordinate space needed and setup for testing, presentations and seminar. • Expenses of the Student Conference to include in the Budget (speaker gift, certificates and covers, tickets, 1 comp registration)

	<p>for Student Conference Chairman only – NOT committee members).</p> <ul style="list-style-type: none"> • Determine if CEU's or contact hours will be awarded for Friday seminar (budget accordingly). • Develop question for oral presentation and send to PESC Coordinators for inclusion in invitation.
5 – 7 months before PESC	<ul style="list-style-type: none"> • Obtain list of Student Chapter Advisors and all student members from Division Board Member. • Send “hold the date” note to Student Chapter Advisors and all student members about the upcoming conference. • Update Outstanding Student Member form and send to Division webmaster for posting on the Division website (deadline for submission should be at 2 weeks prior to event). • Set deadline for membership requirement (approximately 2 weeks prior to event).
2 months before PESC	<ul style="list-style-type: none"> • Send note to Student Chapter Advisors and all student members about the upcoming conference and Outstanding Student Member. • Review/change/develop written test questions. • Work with PESC Coordinators to ensure that Friday events and timeframe are correct.
1 month before PESC	<ul style="list-style-type: none"> • Obtain UPDATED list of Student Chapter Advisors and all student members from Division Board Member. • Send note to Student Chapter Advisors and all student members about the upcoming conference and Outstanding Student Member. • Make sure PESC coordinators have complimentary table provided for Scholarship Fundraiser at PESC. • Work on scripts for Testing, Presentation, Seminar and Recognition Luncheon. • Prepare and copy seminar evaluation for Friday seminar. • Request registration list from PESC Coordinator(s) to line up 3 IAAP panelists for presentations on Friday morning (should not know the students). if they accept, prior to event: <ul style="list-style-type: none"> ○ request brief bio sketch ○ send copy of presentation guidelines ○ send copy of presentation score sheet • Purchase seminar speaker(s) appreciation gift (suggest gift card or gift basket). • Arrange for the grading of tests in a secure location (most likely a hotel sleeping room).
2 weeks before PESC	<ul style="list-style-type: none"> • Deadline for students to become members of Alabama Division to receive monetary awards. • Make copies of written test questions. • Check supply of certificates/jackets and purchase more if needed (be prepared for a tie). • Copy presentation score sheets for panelists and place in file folders.

	<ul style="list-style-type: none"> • Collect and verify points for Outstanding Student Member of the Year form. • Prepare certificates of appreciation for panelists and put in jackets. • Prepare certificates of appreciation for Friday afternoon seminar speaker and put in jackets. • Prepares certificate of attendance for Friday seminar if no CEUs are offered. Include topic, date and number of contact hours awarded. You can sign or ask Division President to sign.
1 week before PESC	<ul style="list-style-type: none"> • Arrange to have computer/printer available to print certificates on-site. • Make sure panelists are lined up and have all info prior to event to include in script. • Ensure that someone from PESC is available to work registration area for Friday morning events and has copies of Program Book and nametags. (May need to supply worker from your Student Chapter Program Committee) • Finalize scripts for testing, presentation and seminar.
PESC	<ul style="list-style-type: none"> • Responsible for Scholarship Fundraising table at PESC (Friday and Saturday). • After student events on Friday, make recommendation to board for number of scholarships to be awarded and amounts of scholarships. • Finalize Recognition Luncheon script. • Print certificates to be presented at Recognition Luncheon: <ul style="list-style-type: none"> ○ Prepare certificates for participants of Competitive Events (no certificate jackets) ○ Prepare certificates for Competitive Event winners (place in certificate jackets) ○ Prepare certificates of Scholarship Award for winner(s) (place in certificate jackets) • Present Scholarship(s) and Awards at the Recognition Luncheon on Saturday (assisted by the Division President). • Deliver proceeds of fundraiser to Division Treasurer for deposit into Scholarship fund. • Responsible for selecting committee members and make assignments as appropriate. NOTE: Only Committee Chair receives complimentary registration for the PESC, not committee members. • Arrange for members to assist with testing and presentations as needed: <ul style="list-style-type: none"> ○ Test proctors ○ Doorkeeper for testing and presentations ○ Timekeeper for presentations ○ Grading of tests and compilation of scores for awards ○ Secure 3 panelists for presentations (preferably IAAP members who are not acquainted with participants) ▪ Assign someone the responsibility of working the fundraising table for Friday and Saturday.

	<ul style="list-style-type: none"> ▪ Check with PESC Committee to see if you need to supply someone to assist at the registration table on Friday morning. ▪ Arrange to have members available to serve as hostesses for the Networking Social (non-Division board members). ▪ If available, work with student chapters in the geographic area of the PESC to help with planning the conference
10 days after PESC	<ul style="list-style-type: none"> • Send Congratulations letter to recipients and include Scholarship Award Information Sheet with copy to Division Board Members. • Provide PESC Coordinator and speaker(s) with evaluation summary
1 month after PESC	<ul style="list-style-type: none"> • Follow-up with Division Treasurer to make sure funds have been sent to college. • Compile recommended changes to guidelines and job description for next year to Division Board.
May	<ul style="list-style-type: none"> • Year End Report Due (part of PESC Report) to Division Secretary • Make sure Division Meeting coordinators have complimentary table reserved for Scholarship Fundraiser at Division Meeting.
June	<ul style="list-style-type: none"> • AIR Article Due to Division Vice President
At Division Annual Meeting following PESC	<ul style="list-style-type: none"> • Give Oral Committee Report at Division Meeting. • Work the fundraising table for Friday and Saturday. Deliver proceeds to Division Treasurer for deposit into Scholarship fund. • Transfer records to new committee chair (or incoming Division President).

FINANCE/FINANCE COMMITTEE

1. Host will receive a checking account with a \$1,000 balance approximately ten (10) months prior to the Division PESC as designated in the Division Bylaws. If the checking account balance drops below \$500, a bank fee of \$6.00/month will be charged and these fees will be paid out of the PESC funds.
2. The Division PESC budget is prepared by the Coordinators and submitted to the Division Board for approval at the Board Meeting nine months prior to the PESC Conference (see Sample Budget).
3. Budget should include, but is not limited to:
 - a. Income
 - 1) Registration
 - Fee shall be set high enough to guarantee expenses and low enough to attract attendance. Registration fee shall be approved by the Division Board.
 - Registration deadline should be set 2 weeks prior to the Conference and late registration fee should be at least \$25 higher than regular registration.
 - Student registration should be low enough to cover actual expenses.

- Professional Merited Member registration may be reduced, but should cover actual expenses.
 - Event is open to members and non-members.
- 2) Corporate contributions, donations of services, products, and appropriate gifts may be sought by Host to help defray expenses of the Division PESC.
- b. Expenses should include, but are not limited to:
- Cost of meeting rooms, equipment (audio visual and other), exhibit space/setup, etc.
 - Expenses for networking social, breaks and meal functions for the Conference (including tax, tip and gratuities).
 - Cost of Continuing Education Units (CEU) provided to attendees. CEUs are required for the educational seminar on Saturday.
 - Speakers' fees, honoraria and courtesy gifts for speakers.
 - Registration for Division PESC Coordinators (PESC and Student Conference Chairman)
 - Registration for Division Board Members (x7).
 - Printing/copying costs for registration materials, program(s), and other materials used during the Division PESC.
 - Mailing expenses (postage, mailing labels, etc.).
- c. Revenue/Loss
- 1) To guarantee a financially sound event, the budget must be realistic and based on a lower-than-anticipated attendance.
 - 2) All revenue incurred from this Division PESC will go to the Alabama Division as stated in the Alabama Division Bylaws and Standing Rules.
 - 3) Any loss incurred from this Division PESC is the responsibility of the division.
 - 4) Vouchers should be completed for all expenditures (see page 25 of these guidelines). An original invoice or supporting documentation should be attached to the voucher and signed by the PESC Finance Committee Chair.
 - 5) No check is to be written without voucher and supporting documents.
4. An audit shall be made of the Division PESC financial records by a special committee of three qualified persons appointed by the Division Treasurer. The Division Treasurer appoints the Committee Chairman and the Committee Chairman will appoint committee members. Financial files should be transferred to the Chairman of the Division Audit Committee within 35 days following the Conference.
- Committee Responsibilities: Ensure that all income/expenditures are budgeted and approved. Items to look for are:
- Approved Alabama Division PESC Voucher (including notation of category charged for expenditures) with copies of all receipts attached.
 - Deposit slips for all revenue received (with notations of category deposited into).
 - Verify that Bank Statements balance to checkbook.

The Committee should address any discrepancies in audit to Meeting Coordinators to allow time for clarification (suggest 2 weeks) before final written report is completed. After audit is completed, the Audit Committee Chairman shall forward the audit report to the Division President. Once accepted by the Division Board, the audit report should be sent to the Coordinators and Finance Chairman of the event and a copy forwarded to the upcoming coordinators for filing. Then funds may be disbursed as stated in the Alabama Division Bylaws and Standing Rules.

The Alabama Division has Tax ID#63-0754378. This Tax ID # is to be used only by the Alabama Division and its official functions.

6. Finance Committee duties:

This Committee serves as Treasurer for the PESC and works closely with the Coordinators.

- a. Works with Coordinators to prepare budget for approval of Division Board to be approved nine months prior to Conference.
- b. Arranges for transfer of signature cards (at least 2 signatures required for all checks written from account) and mailing address for monthly statements on Division PESC Checking Account. Division President, Division President-Elect and Division Treasurer should all have signature authority on this account.
- c. Receives and deposits all monies (Registration, Ways & Means, Donations) and maintains record of income using Division Deposit of Funds Receipt.
- d. Any registration refund requested after deadline requires board approval.
- e. Writes checks for all expenditures approved by the Coordinators and receipt of Voucher and supporting receipts. Obtains proper signatures on voucher and check.
- f. Coordinates with Division Treasurer to open and close Division Seasonal Credit Card account.
- g. Processes credit card billing with registration forms forwarded by Registration Committee.
- h. Coordinates solicitation of donations from local corporations, suppliers, etc. (OPTIONAL)
 - 1) Prepare letter for mailing to prospective donors. Division Board and Division PESC Coordinators must approve the letter.
 - 2) Document all donations and corporate contributions and provide list of donors and corporate contributors for acknowledgment in printed program.
 - 3) Immediately upon receipt, deposits all donations received.
 - 4) Following Division PESC, prepare letter of appreciation to each donor and corporate contributor, with copies to Coordinators.
- i. Provides final Income/Expense Statement (actual versus budget) and backup documentation to Division Audit Committee within thirty (30) days of the Division PESC.
- j. Once Audit has been completed, provides results of audit and distributes revenue/loss to the Alabama Division as stated in the Division Bylaws and Standing Rules.

- I. Transmits all files electronically to Division Website Committee Chair within 45 days of conference.

COORDINATORS

1. Individual(s) to serve in this capacity are selected by the Division President-Elect. The PESC Committee Chair will serve as the Coordinator of the entire Conference. The Alabama Division Student Conference/Scholarship Committee Chair will serve as co-coordinator. An additional co-coordinator may be appointed to assist with PESC responsibilities. In this document, all will be referred to as Coordinators. It is important that the Coordinators remember the Division President is in charge of the Division PESC and makes all final decisions.
2. Responsibilities of the Division PESC Coordinators:
 - a. Keeps Division President informed of conference planning through regular progress reports.
 - b. Serves as liaison between the Division President and Committee Chairmen.
 - c. Serves as liaison between Committee and the Conference facility (IAAP Convention and Meetings Manager may be contacted for assistance if needed).
 - 1) Establishes Master Account with hotel/meeting facility and determines who is authorized to sign for charges.
 - 2) Arranges for block of rooms at hotel to be reserved for Division PESC attendees.
 - 3) Arranges for all meeting room set-ups (see sample Meeting Space Guides).
 - 4) Meets with hotel/facility after Division PESC to complete history information.
 - 5) Forward Division PESC history information to next Coordinator.
 - d. Coordinates meal functions, networking social and refreshment breaks held during the Division PESC (may appoint a committee chairman for this function).
 - e. Appoints committee chairmen.
 - f. Directs, correlates, and dispenses information to and from all committee chairmen.
 - g. Coordinates preliminary information to be distributed 1 year prior to the Division PESC. Materials should be approved by the Division Board (suggest using proposed agenda and any other materials about area to be visited).
 - h. Monitors and ensures that deadlines are met.
 - i. Approves all expense vouchers and co-signs all checks. Suggest designating one specific coordinator to handle finances.
 - j. Makes sure that the Finance Committee transfers files to Division Audit Committee within 30 days of Conference.
 - k. Ensures that Division PESC files are passed on to next coordinator within 60 days.
3. Division PESC Registration is complimentary for Coordinators.

COMMITTEES

The following committees are recommended for planning and coordinating a Division PESC. However a coordinator may establish other committees or combine committee responsibilities, as it deems necessary and most workable.

ARRANGEMENTS

This Committee works closely with the Division PESC Coordinators. Requests by all committees for particular physical arrangements should be made through this Committee.

- a. Secures official Division PESC opening participants as delegated by Division President through Coordinators, as follows:
 - 1) National Anthem
 - 2) Pledge of Allegiance – led by Division Vice President
- b. Purchases certificates and jackets and prepares for Official Division Conference Opening Participants as listed above, and also for speakers. Division President will sign.
- c. Prepares reserved signs.
- d. Checks meeting room set-up and tests all audio visual equipment (including public address system) before each session to ensure that all physical arrangements, props and equipment are in place at least one-half hour before each event. Makes sure American Flag is properly placed to the right of the speaker or staging area. Other flags should be to the left.
- e. Ensures assembly is provided with water and glasses. Hard candy/mints adds a nice touch, but not required.
- f. Places directional signs, if needed, at least one-half hour prior to event.
- g. Works with Ways and Means Committee to ensure tables are ordered and set up properly.
- h. Secures IAAP banner(s) to be used for all events and makes sure it is in the correct place when needed.
- i. Makes sure that all anticipated expenses are included in budget.
- j. Performs other duties as directed by Coordinators.

DOOR PRIZES (SATURDAY)

1. Solicits items to be given away at the conclusion of the Conference on Saturday afternoon.
2. Determines method of giving them away (tickets, write name on paper, names printed from registration list, etc.)
3. Recruits volunteers to help draw names/tickets and deliver door prizes to winners.
4. Makes sure that all anticipated expenses are included in budget.

FINANCE

This Committee serves as Treasurer for the PESC and works closely with the Coordinators.

- a. Works with Coordinators to prepare budget for approval of Division Board to be approved nine months prior to Conference.
- b. Arranges for transfer of signature cards (at least 2 signatures required for all checks written from account) and mailing address for monthly statements on Division PESC Checking Account. Division President, Division President-Elect and Division Treasurer should all have signature authority on this account.
- c. Receives and deposits all monies (Registration, Ways & Means, Donations) and maintains record of income using Division Deposit of Funds Receipt.
- d. Any registration refund requested requires board approval.
- e. Writes checks for all expenditures approved by the Coordinators and receipt of Voucher and supporting receipts. Obtains proper signatures on voucher and check.
- f. Coordinates with Division Treasurer to open and close Division Seasonal Credit Card account.
- g. Processes credit card billing with registration forms forwarded by Registration Committee.
- h. Coordinates solicitation of donations from local corporations, suppliers, etc. (OPTIONAL)
 - 1) Prepare letter for mailing to prospective donors. Division Board and Division PESC Coordinators must approve the letter.
 - 2) Document all donations and corporate contributions and provide list of donors and corporate contributors for acknowledgment in printed program.
 - 3) Immediately upon receipt, deposits all donations received.
 - 4) Following Division PESC, prepare letter of appreciation to each donor and corporate contributor, with copies to Coordinators.
- i. Provides final Income/Expense Statement (actual versus budget) and backup documentation to Division Audit Committee within thirty (30) days of the Division PESC.
- j. Once Audit has been completed, provides results of audit and distributes revenue/loss to the Alabama Division as stated in the Division Bylaws and Standing Rules.

HOSTESSES

Hostesses may be needed to direct traffic from main lobby to registration area and meeting rooms. Makes sure that all anticipated expenses are included in budget. The number required will depend upon the size of the assembly. They should:

- 1) Be easily identifiable.
- 2) Distribute handouts if needed.
- 3) Be familiar with the Conference facility and the location of all restroom and meeting rooms used for activities.

- 4) Assistance may be requested to help in registration area on Friday/Saturday.

INVITATIONS (Registration Brochure)

Responsible for preparing and mailing the Division PESC invitation.

- a. Makes sure that all anticipated expenses are included in budget.
- b. Prepares invitation materials for review and approval by Coordinators and Division Board.
- c. Secures bids on printing and arranges for printing of invitation information.
- d. Orders mailing labels from Headquarters with Division President's approval. Form for Confidentiality Guidelines/Agreement for Member Information-List Rentals is available from Headquarters (requires Division President's signature). Labels should be ordered approximately one month before mailing date.
- e. Submits preliminary information and final invitation to Division Website Director for posting as early as possible.
- f. Mails invitation materials with complete information on Division PESC sixty (60) days before Division PESC to all members in the Division.
 - 1) First-class postage should be used for mailing.
 - 2) If bulk rate mail is used, allow additional thirty (30) days mailing time.

Invitation materials should include:

- 1) Dates of Conference.
- 2) Registration fees.
- 3) Registration deadline and refund policy two weeks prior to event.
- 4) Conference Facility and/or Hotel information, including:
 - a) Name, location, and telephone number of facility.
 - b) Room rates and reservation options and deadlines.
 - c) Driving directions and map to hotel and/or conference center.
- 5) Conference agenda (Division President will prepare).
- 6) Seminar information, including CEUs to be awarded and recertification points earned, if approved. If not approved, list as Pending.
- 7) Attendee Information Required
 - a) Name, address, telephone number, facsimile number, e-mail, and employer
 - b) Chapter/Division affiliation
 - c) IAAP member number or Social Security number (for CEU processing)
 - d) Credentials: CPS/CAP holder; Chapter, Division, or International Officer, Trustee, Conference First-Timer; or other
 - e) Student Conference activity participation.
- 8) Name, address, telephone number and e-mail of Coordinator or who to contact with questions.

- 9) Method of payment. Include fax number for credit card transactions.
- 10) Information regarding accessibility for the disabled or dietary restrictions.
- 11) Notation regarding room temperature and dressing accordingly.
- 12) Check-off boxes for any other information required.

NETWORKING SOCIAL (FRIDAY)

The function of this committee is to plan and coordinate the networking social. All planning and arrangements for this event should be coordinated through the Arrangements Committee and are subject to the approval of the Coordinator and Division Board.

- a. Coordinates with Arrangements Committee any needed space.
- b. Ensures that Food (typically punch and light snack like nuts or trail mix) has been ordered.
- c. Provides information on Networking Social for inclusion in Registration materials.
- d. Makes sure that all anticipated expenses are included in budget.

PARTICIPANT BAGS OR GIFT(S)

1. Committee may choose to provide participants a bag of items or a gift.
2. Bags should be placed in chairs or passed out on Saturday morning prior to the session.
3. Makes sure that all anticipated expenses are included in budget.
4. Following Division PESC, prepare letter of appreciation to each donor with copies to Coordinators.

PHOTOGRAPHER(S)

1. Person(s) designated to take photographs of all events on Friday and Saturday.
2. Ensures that the Division President and Division Website Committee Chair receive photographs (on CD) of all photographs taken during the weekend.

PROGRAM BOOKS

Assembles Program Book by either creating a booklet or other means as approved by the Division Board. Prepares Evaluation of entire weekend and distributes at Conference. Makes sure that all anticipated expenses are included in budget.

The Program Book should include the following information:

- Agenda (provided by Division President)
- Seminar topic and bio information on seminar speaker

If space permits, include list of Division Officers

PUBLICITY

1. Prepares and submits news releases to local media subject to review and approval by the Coordinators and Division Board.
2. Prepares media kits for local media to include:
 - a) General news release concerning Conference
 - b) Public Service Announcements
 - c) Short biographies on speakers and VIP's in attendance
3. Contacts Chapter Presidents, Division Members at Large and Division Membership with quick reminders about upcoming conference, registration deadlines and hotel block deadlines, etc.
4. Makes sure that all anticipated expenses are included in budget.

RECOGNITION LUNCHEON (SATURDAY)

1. This committee coordinates with the Alabama Division Certification Program Director on needs for the event.
2. Responsible for special Decorations (if any).
3. Prepares luncheon program, listing those being recognized for certification (obtain from Alabama Division Certification Program Director).
4. Makes sure that all anticipated expenses are included in budget.

REGISTRATION

This Committee is responsible for all aspects relating to Conference registration as well as tabulating the Registration Report.

- a. Prepares registration packets, to include:
 - 1) Attendee name badge (including special designations as needed i.e. Division Officer, First Timer, Hostess, etc.)
 - 2) Tickets for special events, if needed. (i.e. meals, seminars, optional events, etc.)
- b. Processes registration forms as received and tracks credentials (CPS/CAP holder; Chapter, Division, or International officer; Trustee, Division Conference First-Timer, or other).
- c. Forwards registration fees received to Finance Committee Chair for deposit weekly.
- d. Forwards registration forms to Finance Committee Chair for credit card invoicing.
- e. Confirms receipt of registration and receipt of payment (specifying amount, payment method and received from) for attendees via e-mail at least 2 weeks prior to event or as received.
- f. Staffs registration area during Conference. Distributes Nametags and the Division Conference Program Book.
- g. Gives registration report during recognition luncheon.
- h. Follows up on collecting unpaid/late registration fees.
- i. Makes sure that all anticipated expenses are included in budget.

SEMINAR

The function of this committee is to plan, promote and coordinate the 3-hour educational seminar which takes place on Saturday morning.

- a. Recommends topic(s) and speaker(s) for approval by Coordinators.
- b. Secures speaker.
- c. Provides seminar topic, speaker bio and speaker photo (if available) to Invitation Committee for inclusion in Invitation materials.
- d. Obtains approval from Headquarters for CEU and recertification points to be awarded and prepares certificates, etc.
- e. Coordinates with speaker(s) and Arrangements Committee required flip charts, audio visual equipment, handouts, etc.
- f. Provides IAAP Seminar evaluation form for participants to complete.
- g. If speaker is a volunteer, determine honorarium amount or gift to be presented.
- h. Prepares certificate of appreciation to present to speaker with check or gift.
- i. Ensures that CEU attendance report, participant list, CEU recording fees and summary of evaluations are submitted to HQ within the appropriate timeframe after the Division Conference (typically 10 days).
- j. Makes sure that all anticipated expenses are included in budget.

STUDENT CONFERENCE RESPONSIBILITIES (FRIDAY) – Coordinated by Division Student Chapter Program Chairman. For Student Conference Timeline, see pages 3-8 of these guidelines.

Responsible for all aspects of the Student Conference activities which take place on Friday.

- Coordinates space needed and setup with Arrangements committee for testing, presentations and seminar.
- Ensures that Student Conference information is included in the PESC Invitation (to include seminar, testing and presentation participation).
- Distributes, collects and verifies points on Outstanding Student Member of the Year forms.
- Arranges for members to assist with testing and presentations as needed.
- Secures judges for presentations.
- Prepares tests.
- Secures speaker for Student Seminar on Friday.
- Prepares seminar evaluation for Friday's Student Seminar.
- Prepares certificate of attendance for Friday's Student Seminar listing topic and number of hours.
- Purchases certificates and jackets as needed for Student Awards (purchase extras in case of a tie).

- Prepares Certificate of Participation for members that take part in Student Chapter activities.
- Prepares Certificates for highest points scored in each area.
- Prepares Certificates of Scholarship for the winners.
- Presents Scholarships and Awards at the Recognition Luncheon on Saturday.

WAYS AND MEANS TABLES (FRIDAY/SATURDAY) - may be Finance Chair, but could be someone else.

1. Updates Ways and Means Reservation form and sends to Division Website Director for posting.
2. Accepts applications and money for Ways & Means tables.
3. Cost of Ways and Means Tables should cover actual expenses. If the facility does not charge for the additional tables, charge \$10/table.
4. Coordinates with Arrangements Committee to ensure that the appropriate number of tables are set up on Friday and Saturday and assists with any needs.
5. Makes sure tables are ordered for Division fundraisers (RTF, Research & Education, Division Scholarship, etc.).
6. All tables should have 2 chairs and a tablecloth (no skirts are needed).
7. Gives Finance Committee Chairman money collected and detail of income for deposit.
8. Makes sure that all anticipated expenses are included in budget.

AGENDA

1. Conference is chaired by the Division President.
2. Recommended items below may be included in the agenda and is at the discretion of the Division President:

FRIDAY EVENTS

<u>Function</u>	<u>Coordinated By</u>
Student Conference Testing and Presentations	Division Student Chapter Program Chairman
Student Advisors Luncheon with Division Board	Division President-Elect
Student Conference Seminar (including refreshment break)	Division Student Chapter Program Chairman
Networking Social	Networking Social Chairman

SATURDAY EVENTS

<u>Function</u>	<u>Given By</u>	<u>Responsible for Asking</u>
Call to order	Division President	
Inspiration		Coordinator
National Anthem	Introduced by Division Vice President	Arrangements Committee selects Singer
Pledge of Allegiance	Led by Division Vice President	
Introductions and Welcomes		
<ul style="list-style-type: none"> • Coordinator(s) 	Division President	
<ul style="list-style-type: none"> • Special Guests (Association Dignitaries and International officers/personnel, Past Division Presidents, Int'l Reps, etc.) 	Division President	
Announcements	Coordinators	Coordinators
Introduction of Seminar Speaker	Seminar Committee Chair	
Appreciation to Seminar Speaker	Division President	
Invocation for Recognition Luncheon		Recognition Luncheon Chair
Introduction of Luncheon Speaker	Recognition Luncheon Chair	
Luncheon Speaker Appreciation	Division President	
Report of Registration	Registration Chair	
Division Recognition		Division Immediate

		Past President
Student Scholarship Recognition		Division Student Chapter Program Chairman
Afternoon Workshop		Division President
Invitation for next Division Meeting	Division Meeting Coordinators	Division President-Elect
Invitation for next Division PESC	PESC Coordinator	Division President-Elect
Official Adjournment	Division President	

CONFERENCE REQUIREMENTS

The following information may vary each year and should be coordinated with the Division President.

1. Conference Date
2. Conference Timetable

Following are approximate times for the various activities/functions:

Friday

Registration for Student Testing/Presentations	9:30 am – 10:00 am
Student Testing/Presentations	10:00 am - 12:00 pm
Division Board Luncheon with Student Advisors	12:00 pm – 1:30 pm
Student Conference Seminar	2:00 pm – 4:30 pm
Networking Social	8:00 pm -9:30 pm

Saturday

Registration	8:30 am -9:00 am
Breakfast (optional)	7:30 am - 8:45 am
Seminar	9:00 am – 12:00 noon
Recognition Luncheon	12:00 noon -1:30 pm
Afternoon Workshop	1:45 pm – 4:00 pm

3. Space Requirements

- a. Sleeping rooms – number of sleeping rooms contracted for Friday and Saturday will depend on Conference history provided by previous Conferences.
- b. Meeting space/set-up requirements:
 - 1) Student Testing/Presentations & Seminar – Friday
 - a) Classroom seating
 - b) Lectern and Microphone
 - c) Allow sufficient room for lectern, A/V equipment, etc.)
 - 2) Networking Social – Friday evening
 - a) Rounds of eight (8) or cocktail seating
 - 3) Breakfast – Saturday (optional)

- a) Rounds of eight (8) or ten (10)
- b) No microphone needed
- 4) Seminar & Workshop - Saturday
 - a) Classroom seating
 - b) Center lectern with lighted microphone
 - c) American Flag to right of the speaker or staging area.
 - d) Allow sufficient room for Ways and Means Tables
 - e) Allow sufficient room for Division Fundraiser Tables
- 5) Recognition Luncheon - Saturday
 - a) Rounds of eight (8) or ten (10)
 - b) Center lectern

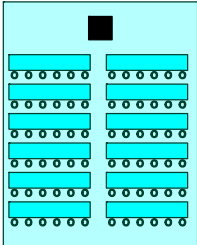
**International Association of Administrative Professionals
INFORMATION REQUIRED FOR AGREEMENT & CONTRACT PREPARATION**

CONTACT:		
TELEPHONE:		
FAX:		
EMAIL:		
INFO REQUIRED FOR AGREEMENT AND CONTRACT PREPARATION		
HOTEL	FACILITY AGREES	FACILITY ALTERNATIVE OR INFORMATION REQUESTED
State check-in and out times		
Individual reservations can be canceled without charge up to 5pm on the scheduled arrival date		
Flat rate (1-4 people) to apply for all nights of guests stay		
% tax on sleeping rooms		
14 day cutoff for room block - Group rates to be available after the cutoff date if hotel has any rooms to sell		
Reduction of meeting room rental based on sleeping rooms booked (if applicable)		
Penalty for not filling room block		
CONFERENCE FACILITY		
Provide the proposed function space outline. PROVIDE SPECIFIC MEETING ROOM NAMES and FLOOR PLANS		
Meeting rooms will be guaranteed in contract and cannot be changed without prior approval from IAAP		
Food and beverage guarantee given 48 hours in advance with a 5% overset		
Cost of meeting room rental		
Extra charge for additional tables (2 chairs and tablecloth) for Ways & Means		
American Flag available for Conference		
Meeting room should have ice water available and refilled during breaks		
HOTEL AND CONFERENCE FACILITY		
Request for Conference dates – possible dates in February and March(# in block needed) Name for room block: IAAP		
No other group of a similar nature in hotel over meeting dates		
Facilities will notify IAAP of any remodeling within 180 days		

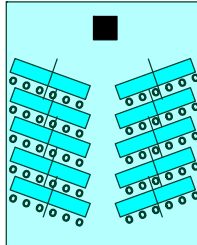
Meeting Space Guides:

Schoolroom (or classroom)

- 30-36" of table space per person
- 2 people per 6-ft. table
- 3 people per 8-ft. table
- 15-17 sq. ft. per person



Classroom



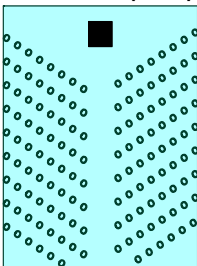
*Herringbone
Classroom*

Theater style with no audio/visual

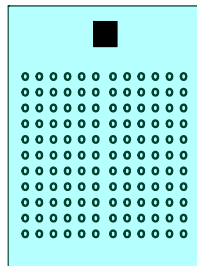
- 7-8 sq. ft. per person

Theater style with audio visual

- 10 sq. ft. per person



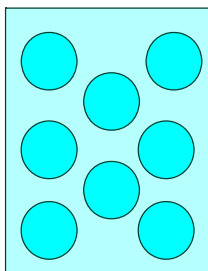
*Theater -
Chevron*



Theater

Banquet

- 11 sq. ft. per person w/out head table
- 12 sq. ft. per person w/head table
- Rounds - 60" seats 8 people
- 72" seats 10 people



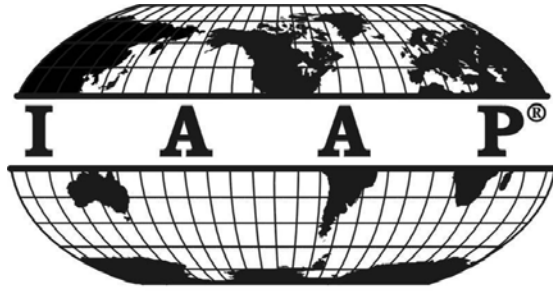
Banquet

Stand-up Reception

- 5-7 sq. ft. per person

Alabama Division PESC Proposed Budget

	Attendees						
INCOME:	40 total	45 total	50 total	55 total	60 total	65 total	70 total
\$75 for Professional members	10	15	20	25	30	35	40
	\$ 750.00	\$1,125.00	\$1,500.00	\$1,875.00	\$2,250.00	\$2,625.00	\$3,000.00
\$25 for Students and Professional Merited Mem	10						
	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00
Comp Registrations (7 board members, 3 coordinators)	10						
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Late Registration (extra \$25)	10						
	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00
TOTAL INCOME		\$1,250.00	\$1,625.00	\$2,000.00	\$2,375.00	\$2,750.00	\$3,125.00
HOTEL EXPENSES:							
Room charge (1 room on Friday)		\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00
Networking Social Food		\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00
Room charge (2 rooms on Saturday)		\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00
Friday/Saturday Breaks	\$ 10.00	\$ 300.00	\$ 350.00	\$ 400.00	\$ 450.00	\$ 500.00	\$ 600.00
Saturday Breakfast (optional)	\$ 6.00	\$ 180.00	\$ 210.00	\$ 240.00	\$ 270.00	\$ 300.00	\$ 360.00
Saturday Lunch	\$ 12.00	\$ 360.00	\$ 420.00	\$ 480.00	\$ 540.00	\$ 600.00	\$ 720.00
Subtotal		\$1,200.00	\$1,340.00	\$1,480.00	\$1,620.00	\$1,760.00	\$1,900.00
Service Charge	18%	\$ 216.00	\$ 241.20	\$ 266.40	\$ 291.60	\$ 316.80	\$ 342.00
Subtotal		\$1,416.00	\$1,581.20	\$1,746.40	\$1,911.60	\$2,076.80	\$2,242.00
Tax	9%	\$ 127.44	\$ 142.31	\$ 157.18	\$ 172.04	\$ 186.91	\$ 201.78
Total hotel expenses		\$1,543.44	\$1,723.51	\$1,903.58	\$2,083.64	\$2,263.71	\$2,443.78
OTHER EXPENSES:							
Seminar Speaker Fee		\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00
Seminar Speaker Hotel Room		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CEU Processing Fee		\$ 30.00	\$ 30.00	\$ 30.00	\$ 30.00	\$ 30.00	\$ 30.00
CEU Filing Fee	\$2.50	\$ 75.00	\$ 87.50	\$ 100.00	\$ 112.50	\$ 125.00	\$ 150.00
Luncheon Speaker Gift		\$ 25.00	\$ 25.00	\$ 25.00	\$ 25.00	\$ 25.00	\$ 25.00
Mailing Labels from HQ		\$ 17.00	\$ 17.00	\$ 17.00	\$ 17.00	\$ 17.00	\$ 17.00
Postage to mail invitations	550	\$ 203.50	\$ 203.50	\$ 203.50	\$ 203.50	\$ 203.50	\$ 203.50
Student Conference Certificates and Jackets		\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00
Certificates of Appreciation and Jackets		\$ 5.00	\$ 5.00	\$ 5.00	\$ 5.00	\$ 5.00	\$ 5.00
Total Other Expenses		\$ 595.50	\$ 608.00	\$ 620.50	\$ 633.00	\$ 645.50	\$ 670.50
TOTAL INCOME		\$1,250.00	\$1,625.00	\$2,000.00	\$2,375.00	\$2,750.00	\$3,125.00
TOTAL EXPENSES		\$2,138.94	\$2,331.51	\$2,524.08	\$2,716.64	\$2,909.21	\$3,101.78
Expected Profit		\$(888.94)	\$(706.51)	\$(524.08)	\$(341.64)	\$(159.21)	\$ 205.65
		40 total	45 total	50 total	55 total	60 total	70 total



**International Association of
Administrative Professionals®**

**ALABAMA DIVISION
PROFESSIONAL EDUCATION AND STUDENT CONFERENCE
(PESC) VOUCHER**

Date: _____

Payable to: _____

Amount: \$ _____

Justification: _____

Budgeted: Yes No

Disbursement requested by: _____
(Name and Title)

Disbursement approved by: _____
(Name and Title)

.....
Payment Date: _____ Check No.: _____ Approved: _____



The Alabama Division, Inc. of IAAP
Alabama Division
Professional Education and Student Conference
Tax ID#63-0754378
www.iaap.net/alabama

Include Contact Information Here
Address
Phone
E-mail