Hosting an ALHFAM Regional Meeting

These guidelines are intended to assist those responsible for planning and running a Regional ALHFAM Conference. Thank you for doing this for your fellow ALHFAMers! We know from experience that the first time a person assumes the responsibility for a conference it can feel like a daunting task. Rest assured that it can be done, and at times even be fun. Be sure to ask the Regional Representative and others in your region, or those from other regions, who have planned a conference for advice and help. Each conference has its own personality, and new things are learned each time a conference is conducted. If you have suggestions or insights, please share them with the ALHFAM Vice President, who chairs the Committee on Regional Networking (CORN).

Planning
Ideally, each Regional ALHFAM Conference should have a Conference Planning Team made up of at least three (3) key people: a Conference Chair, a Program Chair, and a Local Arrangements Chair. If possible the Regional Representative should also serve on the Planning Team, or at least be frequently informed of progress and decisions. Usually a museum, farm, or other site in the region serves as the Host for the meeting. The Conference Chair and Program Chair are typically staff members of the host institution. The Local Arrangements Chair can come from the same museum or another local institution. Others may be added to the Planning Team as needed, but a larger group makes it difficult to schedule planning meetings and efficiently make decisions. For the sake of practicality, it is often best to have all committee members in relative geographic proximity (i.e. within about an hour’s drive).

Ensure that the entire organization of the host institution is aware of the plans for the meeting and is committed to making the conference a success. Hosting a Regional is a big commitment, but also one that brings a considerable number of living history professionals to the host site. It is an opportunity for the professional development of the host site’s staff, as they show off what their site is all about, and learn from and share with living history colleagues.

Examine programs from past Regional Conferences, and those of other regions posted on the ALHFAM website. The Conference Chair should talk with people who have planned other regional conferences to get a better idea of what is involved. The Regional Representative and the ALHFAM Vice President (CORN chair) can suggest some recent conference organizers from inside and outside the region for the Conference Committee to talk with.

Sometimes two contiguous regions may decide to hold a joint conference. This has various advantages (including economies of scale and larger potential audience, for example) and disadvantages (including a larger geographic area, making attendance more difficult for some). Work load and financial considerations (e.g. how will revenues be divided?) should be discussed agreed upon early in the process.
The Conference Committee should develop a theme for the conference related to the strength of the host site or area. It should be broad enough to attract wide-spread interest, but need not necessarily preclude sessions not strictly adhering to the conference theme. Again, refer to past regional and annual conferences for guidance.

**Scheduling the conference**

If possible, Regional meetings should be scheduled at least two years in advance. The Regional Conference should be held at a time of the year that maximizes the opportunity for the members in the region to attend and should not conflict with or be scheduled close to the Annual Meeting, which is usually held in June. The Regional Meeting should also avoid the annual off-season Board of Directors meeting, which is usually held during the first two weeks of November. Also check the ALHFAM website, to ensure that no other regions, especially contiguous regions, have a conference scheduled for that date. Finally, make sure that it is not the “busy season” for hotels in the area, so that there will be adequate available lodging at a good price.

Most Regional meetings tend to be scheduled over a weekend, sometimes with a reception on the Friday evening, or optional workshops during the day Friday. (Avoid calling anything “pre-conference,” as this makes it hard for some people to justify for professional development reimbursement.) Some offer optional tours or workshops on Sunday afternoon, making it easier for those who may need to travel home early on Sunday. These are just options to consider, not essential elements.

Regional Meetings should also be moved around the region to optimize the visibility of ALHFAM, to make it easier for members in various parts of the region to travel to the meeting, and to bring in new members.

**Financial matters**

Draft a budget that covers all expenses and leaves a surplus, as one goal of a regional meeting is to generate monies to fund regional ALHFAM operations and activities. It is critical that the conference not lose money.

The host site and conference committee should clearly understand that the financial success of the meeting is their responsibility. If the conference loses money, the host museum and/or the region must absorb the shortfall. It will not be underwritten by ALHFAM as a whole. Make sure that this is understood by all parties, and make an agreement in advance for how any deficit will be paid. Surplus revenues go to the region.

Careful budgeting can prevent most fiscal problems. Since some expenses are fixed and others per person, draft a budget based on various levels of attendance, with the “break even” figure of revenues versus expenses well below expected attendance levels. Estimating possible attendance is very important, and will be a challenge. Some conferences may attract over a hundred attendees while others may only attract 30 – 40. Be conservative about the attendance when building the budget and setting the registration fee. It is better to assume low attendance and actually build in a surplus. A
common mistake is to take on a large fixed cost, such as busses for field trips, and then have a lower than anticipated attendance. You still have to pay for half-empty buses, and the bottom line is affected dramatically. Reviewing budgets from previous regional conferences is helpful by way of general guidance and comparison.

A good target goal for per person conference registration for a regional conference is under $100, with $150 being about the most to consider for a weekend conference. The lower the cost, the more likely members will attend. Once the registration fee is set, be sure to make clear to those registering what is included and what is not included in the registration fee. To keep costs down, some regions make the Saturday dinner (the “big meal”) optional with an added fee, but often this diminishes a feeling of group fellowship, so this is something to consider.

Start-up money is available from the region (contact the Regional Representative), but must be repaid to the regional treasury by the conference host from surplus conference revenue. Start-up money can be used for deposits, printing, postage, and to pay for other costs that might be incurred before the receipt of any registration fees. This money can be run through your museum’s accounting system, the regional treasury, or a separate bank account can be used.

Finding underwriters and donations of goods and services (e.g. paper, copying, transportation, food, beverages, entertainment, etc.) can make a huge difference in keeping costs down. Often the host museum, other regional sites, businesses, local groups, and even interested individuals can supply some of these things, or offer discounted rates. A mention of such generosity in printed conference materials such as the program is generally expected.

It is essential to keep good, itemized financial records throughout the conference. Set up a bookkeeping system to keep track of all expenses and revenues. Save all receipts in a separate file and keep a log of all expenses. As expenses occur, make note of what was purchased, when, by whom, and how payment was made (cash, check, or credit card). This makes it much easier to track reimbursement and prepare your final expense statement. As registration payments are received, check that the amount paid has been calculated correctly. Errors are not uncommon. At the end of the conference, all bills should be paid from this account, and the initial start-up money plus any surplus, including auction proceeds (which are not counted as conference revenue) should then be sent to the Regional Representative. Originals of all invoices, receipts and registration forms should also be sent to the Regional Representative in a folder.

Local Arrangements
Securing lodging is one of the first things a Planning Committee should do. Regional Conferences are often headquartered at a convenient hotel or motel if the host site does not have adequate meeting facilities. All hotels have several rates; almost all have a General Rate but they also have a Corporate Rate, which is cheaper, and a Government Rate that is lower still. (Nearly everyone in ALHFAM works either for a corporation or
government.) Hotel managers usually also have some flexibility on rates, especially if they can book a large number of rooms at an otherwise slow time (“off-season”) for the hotel. As mentioned above, consider this too when choosing dates for the conference and avoid other local events. Often a hotel manager may agree to provide meeting rooms gratis or at a discount if s/he can expect to book enough guest rooms. If possible try not to guarantee a minimum of rooms, though, unless you are reasonably certain you can meet it. Negotiate to get the best rate, even if you cannot guarantee a certain number of rooms, as cost of lodging often determines if people can afford to attend a conference. Be sure to include Thursday, Friday and Saturday nights in your negotiated rate for lodging to accommodate early arrivals. If the selected hotel offers a complimentary breakfast, that will save money for either the registrants or the conference budget. (Make sure information about lodging, rates, how to book a room, and breakfast or other amenities such as Wi-Fi is on the conference registration flyer and/or registration form.) Finally, most conferences let attendees book their own hotel rooms, so provide clear contact information, including deadlines if any.

Arrange for a “hospitality suite” – a room in the hotel where participants can relax and interact after the official activities have ended. Negotiate with the host hotel, as they may offer this gratis or at a reduced rate in exchange for the revenue that the conference generates for them. (Many offer the breakfast room.) The hospitality room should have soft drinks and light snacks available on a self-serve basis. The Conference Committee should discuss whether it will and/or legally can provide complimentary beer and wine, or if attendees can bring their own. (If the former, consider having a donation jar to help offset costs.) Check local and hotel regulations about the consumption of alcohol by attendees, and abide by those rules.

Transportation during the conference is another issue to consider. Past experiences have shown that buses to transport participants from one site to another are very expensive. Avoid this if possible. If you do plan on going to more than one site, consider asking those who drive to the meeting to help you “carpool” the event. Also keep in mind that large vans might be less expensive and more suited to the number of participants than buses.

Food
Food is a major conference expense, but conversation over meals often one of the best parts of ALHFAM conferences. That is why most meals are traditionally integral parts of ALHFAM conferences. If possible, however, avoid scheduling meetings over meals, as they rarely work out well. Most regional conferences run from Friday through Sunday noon, with Friday typically reserved for full- or half-day workshops. Make it clear in registration materials what is and what is not included.

Participants enjoy trying regional foods, so keep that in mind when planning menus.
**Breakfasts**
If the conference hotel does not have a complimentary breakfast, you will need to provide at least a continental breakfast on Saturday and Sunday, or clearly advise attendees in the registration materials that breakfasts will be on their own…and suggest some nearby options.

**Lunches**
Plan on providing a Friday lunch if you have scheduled workshops or sessions (often box lunches are included in workshop fees), and another lunch on Saturday. Some regions have provided a lunch on Sunday as well, but depending on scheduled programming, most do not as many participants leave at mid-day on Sunday or even skip the Sunday morning sessions altogether.

**Dinners**
Most conferences offer a Friday evening reception of some kind, although usually a dinner is not required. Hearty snacks and beverages typically suffice. Dinner on Saturday is typically the “big meal” of the conference. It need not be fancy (some regions have had a BBQ) but it should be nice nonetheless. Some conferences encourage attendees to either wear modern business casual clothing, or historical costume for this meal. See more below under “Programming.”

**Breaks**
Coffee, tea, water, and soft drinks as appropriate, and light snacks, are typically offered at mid-morning and mid-afternoon breaks.

Caterers can be expensive and usually require an absolute guaranteed minimum, whether or not that minimum shows up. Shop around for the best prices from local caterers, and unless the host venue requires it, the same caterer need not be used for every meal. Even per person charges for coffee, drinks, and snacks for breaks can be quite expensive, so budget accordingly. All arrangements should be covered in writing. Be sure to check on deadlines with any caterer for quantities ordered, final cost, and how and when payment is made.

To reduce conference costs, consider what conference volunteers might be able to provide (such as preparing, serving, and cleaning up after breaks). If you have access to a Sam’s Club or other discount provider, consider purchasing snacks, beverages, paper goods, condiments, desserts (including fresh bakery items), and other prepackaged foods there to save money. Be sure to assign people who are not otherwise engaged to pick up, serve, and clean up.

Also, solicit donations of money or goods and services from local business to help support the meals, beverages or snacks at the conference. Since many people have dietary restrictions (vegetarian, vegan, gluten-free, Kosher, etc.), consider how you will address them. Often the simplest way is by offering at least some meals buffet-style with multiple options.
Branding
As on-line and/or print materials for the conference are developed, please follow the ALHFAM branding guidelines to ensure a consistent and professional appearance for the organization. They can be found on the ALHFAM website, specifically at


This site includes a downloadable PDF and all the downloadable logos you will need.

Promotion
Once a planning team is in place, and a date, location, and theme decided upon, it is time to let people know about the conference! Contact the ALHFAM Webmaster, Communications Manager, and the CORN (Committee On Regional Networking) Chair (who is also the Vice President) to let them know. Contact information is in the The ALHFAM Bulletin and the Website, www.alhfam.org.

A call for proposals for speakers and workshops should go out at least six months before the conference. Promote the call via your regional newsletter, Facebook page, the regional section of the ALHFAM website, the ALHFAM e-update, etc. Consider some targeted mailings, but electronic communication can carry most of the burden. The Regional Representative has a list of regional members along with their contact information. Also promote the call to adjacent states, the ALHFAM board, and other regional reps. Contact information can be found in The Bulletin or from the Secretary-Treasurer. Also spread the word to regional college History, Agriculture, and Museum Studies departments, and any people and sites you can think of that are not ALHFAM members but who should be!

The call for proposals should make it clear what you are looking for: presentations, panel discussions, half-or full-day workshops, tours, site visits, etc. Include a deadline at least three months before the conference date, so that a program can be put together and disseminated in a timely manner (at least two months before the conference but preferably longer). Inform presenters if their proposals have been accepted, or discuss with them possible modifications (combining with a similar proposal, altering length or format, etc.).

Make it clear in the call for proposals that as a collegial organization ALHFAM typically does not pay honoraria to presenters (except sometimes for keynote speakers) and presenters are expected to register for the conference at the normal rate. Making this clear from the start avoids awkward situations later.

Although many ALHFAM members will respond to the call for proposals, and offer to present sessions or teach workshops, also recruit staff and volunteers of the host institution to conduct sessions and/or workshops. Furthermore, just putting out a call for presentations is generally not enough to fill the schedule. The conference committee should personally solicit presentations on appropriate topics. Do not wait till the closing
date of the call for proposals to fill in gaps, but be proactive in creating sessions at the beginning of the planning process. In other words, don’t sit back and wait for presenters to come to you; beat the bushes!

**Programming**

Once proposals have been submitted, accepted, and confirmed, develop a conference program. Consider the following:

Give conferees some choice. While meals, meetings, the keynote address, etc. will be universally attended, consider offering concurrent options for other presentations and workshops.

ALHFAM members routinely report that they like hands-on workshops from which they can take home a skill or product. Sessions on textiles and clothing, cooking, and animal care are generally very popular. Conference workshops are often but not necessarily on the day before sessions, often a Friday, and normally are either half- or full-day. If half-day workshops are offered, make sure there are also several workshops offered for the other half of the day as well, or suggest site visits or other activities for the remainder of the day. Trips to other sites might also be considered for this time. If you offer Friday workshops, trips, or programming, plan on hosting a Friday night reception with heavy hors d’oeuvres and light entertainment.

Many regional meetings have a keynote speaker on Saturday morning. This is optional. If you have one, the speaker’s topic should support the conference theme.

Set aside at least 30 minutes to an hour during the conference to allow the Regional Representative to conduct a business meeting; before or after lunch on Saturday is a typically a good time for this. Try to avoid scheduling meetings over meals if at all possible.

Saturday night dinner and entertainment should be festive. Dances and music are popular. At many conferences members like to dress in their period clothes, so enabling them to get back to their hotel room to change is helpful.

A fund raising auction is traditionally held at each regional conference and it typically closes Saturday night. Encourage attendees on the registration form to bring items for the auction. Some conference hosts have also gotten local craftspeople, artisans or other supporters to donate items with local flavor to the auction. Silent auctions are good, but if the volume and quality allow, a live auction is fun too. The auction should be set up and functioning for as long as possible – if the meeting will be at one location all day Saturday, the silent auction can run all day. Recruit volunteers to assist with the auction and to take payment from participants when it closes. Make it clear throughout how payments can be made, i.e. will credit cards be accepted? To whom should checks be made out? Also consider providing beer, wine, and soft drinks for sale just before and during the auction. (Be sure to check your site policy on providing and/or consuming alcoholic beverages. Some sites permit consumption of alcohol if brought by other
persons, but are not permitted to provide alcohol beverages to outside participants due to legal issues.) Make it fun. Money raised in the auction helps to pay for regional fellowships and is not included in the conference profit.

Having vendors at a regional ALHFAM conference is optional. Vendors should set up Saturday during the day in a common area where attendees can see them, especially at scheduled breaks. They should not compete with the auction. They might be asked to donate an item to the auction.

Field trips are great but not a requirement. If a field trip is planned, limit the amount of time spent on the bus or van and consider having the field trips as part of the “pre-conference” workshops or at the end of the day so that the trip location could serve as the dinner site as well. If a field trip is a pre-conference trip, it should break even. If it is an all day trip, lunch can be included in the cost, or made clear if “on your own.” Since regional meetings are so short, time spent on transportation only cuts into program and costs cut into profit. Sometimes vans are available from host sites for transportation at no cost, but hired vans can be costly.

Once sessions and all activities have been decided upon, make a schedule, allowing time for breaks. Have several people review it. Folks not involved with conference planning often catch conflicts, mistakes, and potentially confusing items more readily than those who are “too close” to it.

**Promotion part 2**

The program schedule and information will then become a conference flyer and registration form that outlines sessions, speakers, workshops, times, locations, registration cost, and of course how to register, viz. a registration form. This program should be as complete as possible with precise details to convince prospective attendees that they should attend your conference. (Again, remember to use ALHFAM Branding Guidelines.) Include information regarding lodging, with prices (including taxes), and booking contact information. If the region offers fellowships to members, remember to include application information in the conference flyer. Let participants know that they can bring site brochures, calendars of events, job postings, etc. Finally, remind them to bring a donation for the auction.

While many attendees at regional conferences drive, some must travel by bus, train, or plane. Provide information on the most convenient airport or station, including if shuttles are available. And check to make sure the given address for the conference venue will really work with a GPS system; if not provide the GPS location.

Before the conference flyer it “goes public,” have a few people not associated with the conference, preferably non-ALHFAM members (consider family and friends) proof read the flyer and registration to ensure clarity.
Some regions still print and mail hard copies of the conference flyer. Others have gone all-electronic as more cost-effective. Whichever you decide, make sure all regional members and other key target audiences receive a flyer, even if this means printing and mailing out a few of an otherwise e-flyer to those without electronic contact information.

Send an e-copy to the ALHFAM webmaster to that it can go on the ALHFAM website. Email flyers to all your regional members, ALHFAM board and officers, and all regional representatives. Send them to the members of bordering regions as well (get contact info from the ALHFAM Secretary-Treasurer or the neighboring Regional Representatives). Mail hard copies to any regional members without email.

You should invite participation, not just “put it out there” in hopes that people may find out about your conference if they look for it. Send Conference flyers to the history, museum studies, and agriculture departments of regional colleges and anyone who might be interested in the conference. Promote your conference to local and regional museums, historic sites, and living history groups. Also consider sending conference flyers to anyone or any organization you know who are not yet ALHFAM members whom your conference, or ALHFAM, might appeal to.

Also promote the conference via your regional newsletter, Facebook page, the regional section of the ALHFAM website, the ALHFAM e-update, etc. Be creative in promoting your conference and attract new potential ALHFAM members. Flyers should go out 6 – 8 weeks before the close of the early registration date publicized on the registration form. This should give those working in government agencies time to get permission to use limited travel funds.

**Registration**

How will participants register? By mail? On-line? Both? Set up a system. Ideally one person should receive, process, and acknowledge registrations. It is hoped that in the near future people can register for both regional and annual conferences; check with the ALHFAM webmaster if this is available.

All registered attendees must be individual ALHFAM members or work at a member institution. A line on the registration form should include a provision to join at the basic rate ($30.00). Typically this is done by having a member’s price and a non-member’s price $30 higher, which includes a year’s membership. Names, contact information, and payments for these new members should be sent to the Secretary-Treasurer in a timely manner.

If you must limit the number of participants due to space constraints, please include a cut-off date (deadline) for registration, and state that registration cannot be guaranteed after that date. Decide on a cancellation policy and state it on the registration form.

The ALHFAM board asks that the ALHFAM Photo Policy apply to regional conferences. So please include the following text on your conference registration forms:
"By signing this form, I acknowledge that my photograph or video may be taken while at this Association of Living History, Farm, and Agricultural Museums (ALHFAM) event by either representatives of ALHFAM or attendees of the event. I understand these photographs or videos may be used in the ALHFAM newsletter, promotional material, web site, social media, and provided to the media, and I will not receive compensation for their use. I further understand that ALHFAM has no control over the use of images taken by individual event attendees."

Confirm with attendees that their registration has been received and that they have gotten into the workshop(s) they requested. E-mail usually is the most convenient and effective means of doing this.

**The Conference Begins**

Use signs to direct participants to where they will physically register and pick up their conference materials. Schedule volunteers familiar with the location to cover the registration table and receive auction items. The conference committee should be on hand when possible, but also free to handle last minute issues and emergencies, not tied to the registration table.

Upon arrival, provide conferees with a hard copy of the conference schedule, a site map if appropriate, and a list of participants that include names, addresses, institution affiliations, phone numbers, and e-mail addresses.

Conference tote bags and other “freebies” are always nice but not a requirement. At some regional meetings the hosts provide a two-pocket folder, note pad, pen and/or pencils and information about the site and agenda. Sometimes conference t-shirts have been printed and offered on a pre-purchase basis on the registration form. All these are optional.

Provide a brochure and information table and announcements board, located in a prominent space that can remain up for the entire conference, for participants’ site brochures, calendars of events, job postings, etc.

Plan for participants to shop! When at a site, make sure museum stores or book stores, etc. are staffed and open. Shop managers should be aware of the theme of the meeting, and might even order special merchandise to enhance the theme. Give attendees a discount, if possible, to encourage purchases. Post gift shop hours and try to open earlier and stay later to accommodate attendees.

Most other issues have been outlined in the planning section above. Inevitably some minor issues will come up, but at this point the conference should happen as you anticipated.
Evaluation
The hosts should survey participants regarding quality and appropriateness of each session, workshop, or presentation, as well as an overall conference evaluation. Provide evaluation forms and collection boxes in several locations to encourage responses. This information can be useful for the host museum and conference presenters as well as for the ALHFAM region, so share the results with presenters (as appropriate) and especially the Regional Representative so that planners of future conferences can benefit.

Wrap Up
Pay any outstanding bills, including any start-up funds received, and prepare your final financial statement. Auction proceeds and any conference surplus should be sent to the Regional Representative, along with your final financial report. Originals (or e-copies) of all invoices, receipts and registration forms should also be sent to the Regional Representative in a folder.

Finally, let the Regional Representative know of any issues, concerns, or suggestions that might be helpful to those planning future conferences.

Thank you!
ALHFAM could not exist without members like you!

-Charles LeCount, John Caramia, Judith Sheridan, Sarah LeCount, David Floyd, John. Patterson
April, 2007
Additional notes from Diane Nadler, April 2008
Extensively updated and revised by Tom Kelleher, January 2014 & 2015