

# Conference in a Box



## Resources for Planning a Successful Election Association Conference



**Coalition of Election  
Association Leaders**

A PROJECT OF ELECTION CENTER

# CEAL Conference in a Box

1. Overview / welcome / introduction (static PDF)
2. How-to guide / instructions (static PDF)
3. Timeline checklist (editable XLS)
4. Sample 3-track agenda (editable XLS)
5. Agenda tracking sample (editable XLS)
6. Attendee list (editable XLS)
7. Sample budget (editable XLS)

# Overview

Conferences and meetings are a key driver for state association success. Statewide or regional conferences provide the infrastructure for collaboration and professional development. For most associations, the association board, a conference planning committee, or the host jurisdiction is responsible for the heavy task of coordinating venues, agendas, food and beverage, vendor management, attendee registration and much more. When planned effectively and efficiently, conferences are one of the main economic drivers for the financial health of a state association. It can contribute to the funding of member benefits such as education and training, mentorship and support initiatives, advocacy, and more. The Conference in a Box is a planning tool that can help organizers with the heavy lift of the project.

The **Conference in a Box** can be found at [electioncenter.org/ceal](https://electioncenter.org/ceal) for download or by joining the CEAL Community as an Election Center member at [www.electioncenter.org](https://www.electioncenter.org).

## How to Use the Conference in a Box

The Conference in a Box is a guide with helpful tips and guidance in planning a successful conference. It contains a workbook with useful templates that association conference planners can adapt and customize, stay on task, develop an engaging and organized program, plan a budget, and track their expenses to support financial success.

Rather than re-inventing the wheel for each event, you can duplicate and customize the planning workbook for the event.

The Coalition of Election Association Leaders (CEAL Team) is ready to provide training and implementation support your association in using or adapting the tool to its greatest benefit to you.

# Planning Workbook

This section of the Conference in a Box will provide a brief description of each tab in the planning tool and how an association might use it to their advantage.

## Timeline Checklist

The Timeline Checklist is a project calendar. The timeline starts with identifying your host location and contracting with venues, scheduling, planning committee meetings, developing agendas and programs, communicating with vendors and attendees, and developing materials, supplies, and development of budgets and provider payments.

The **Timeline** (Column A) is a well-tested framework that aligns with most hotel and conference center contractual timelines.

### Helpful Tip

Associations can contract conference planning firms that provide a free service of facilitating the contracting with larger venues. They get a finder's fee from the hotel chains. You can often get better pricing for multi-year contracts.

The **Status update** (Column B) keeps the planning on task and color coding can elevate the urgency of the task for the timeline.

The task is assigned to a **Responsible party** (Column F) defines clear roles and responsibilities for the conference planning team. These can be positions (such as board members) that would rotate as the board changes or are assigned to specific individuals on the planning team.

The **Notes** (Column G) are useful descriptions and tips for the task and can be retained in a template workbook saved for duplication for each event. Custom notes for each event can be added for reminders, contacts, or concerns.

## Sample 3-Track Agenda

The Sample 3-track Agenda is the template for a robust 3-day conference agenda with three tracks of programs or content. This tab can be modified for single track meetings or single-day conferences.

The agenda can be used for a printed program or imported into a web or conference application.

### Helpful Tip

The Conference in a Box workbook can be on a shared drive for planning team review to update or manage by the executive director or planning committee chair.

## Agenda Tracking

The Agenda Tracking tab is the detailed “run of show” for your conference or meeting. The template is populated with a detailed example of a large conference run of show.

Each **Session** (Column C) is detailed as the agenda planning progresses. The session is named and includes a detailed **Description** (Column D) that can be modified and used for the printed program or conference application.

It is important to track if the presenters/speakers have been confirmed (Columns F and G) and if they have submitted their presentation proposals or materials. Reviewing the content is recommended if you are unfamiliar with the material.

It is useful to assign a session moderator/organizer (Column H) to ensure the presenter is introduced, the technology is working appropriately, and the presenter has all that they need. This tab also includes a place to keep a short BIO (Column M) for each presenter and/or panelist.

The Agenda Tracking tab can be customized for the number of tracks and breakout series for your event.

## Attendee List

Planning an event begins and ends with your members and attendees. The Attendee List tab is a placeholder for importing your registration list from an application or independent platform, or you can manually track invitations and/or attendee registrations.

Important: Understanding your registration goal of attendees, as well as the maximum number of registrants your conference can accommodate, is critical. This will be determined or limited by the contracted venue: hotel room blocks, or the capacity of your main ballroom for meals and your largest sessions.

The hotel will provide room block tracking reports that you can utilize to monitor the progress of your attendee registration and ensure both registration and hotel accommodations are confirmed. This room block can be added to the workbook as it is updated, or

Keeping tabs on registration enables your planning team to communicate with attendees, plan outreach communications and updates to members or invitees, accommodate speakers and guests and more.

The **attendee list** includes tracking for confirmations, payments, and can track revenue (Columns C, D, and E) for your event that is important for the economic success of your association.

## Sample Budget

A well-planned conference budget is essential for your event's financial success. The **Sample Budget** template provides a starting point to help ensure your event stays profitable and, ideally, generates funds to advance your membership goals.

The budget is built on a road-tested three-day conference of 300 attendees. It can be modified to scale up or scale down based on the nature of your event.

The tab tracks both expenses such as meals, audio visual costs, entertainment, supplies, conference security, and more. But even more importantly, you can track your revenue from conference registrations, vendor registrations, and sponsorships.

### Helpful Tip

Most venues do not charge for room rental but will make up for it in Audio/Visual charges and support. For smaller breakout rooms, consider providing your own laptops and screen for presentations to save costs.

# Conclusion

The CEAL Team hopes that the Conference in a Box tool is a helpful and productive resource for your state association. These templates are designed to prevent your executive director or planning committee from “reinventing the wheel” for each convening you are planning by establishing a plug and play tool for your use.

We are ready to support you in scheduling a virtual meeting to review the tool, adapt a template for your specific type of conferences, and support your journey to a smooth and successful convening! Contact us at [ceal@electioncenter.org](mailto:ceal@electioncenter.org).