



ASSOCIATION OF
FRATERNITY | SORORITY
ADVISORS

State/Regional Meeting and Webinar Planning Guide

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This resource was created to assist State/Regional Meeting Coordinators with the planning of their meetings. Should you have any questions or need any clarification, please contact your Regional Director, the Vice President for Membership, or the AFA Central Office.

The Association extends special acknowledgement to Blake Bradley, Illinois Wesleyan University, for his work on the first draft of this resource.

Planning a State/Regional Meeting

The State/Regional Meeting is an incredible opportunity for fraternity/sorority professionals and volunteers to come together to exchange ideas, network, and develop new skills. It is our hope that this document will provide the State/Regional Meeting Coordinator the necessary resources to plan a meeting.

EXPECTATIONS FOR AFA STATE/REGIONAL MEETINGS

- All State/Regional Meeting Coordinator and State/Regional Meeting staff must be AFA members and pay full State/Regional Meeting registration.
- Budget responsibly. The State/Regional Meeting Coordinator(s) is responsible to oversee expenses for the State/Regional Meeting. The event must be self-sustaining. All deficits will be the responsibility of the Coordinator's institution/organization.
- A tentative budget must be submitted to your Regional Director and the Vice President for Membership BEFORE setting the State/Regional Meeting fee.
- AFA Associate Members should be included in the bid process for State/Regional Meeting materials. For information on current AFA Associate Members please contact the AFA Central Office or visit the [AFA website](#).
- The AFA Executive Director must sign ALL contracts on behalf of the Association.
- Ensure that all meeting publications follow the guidelines set in the AFA Visual Standards Manual. All State/Regional Meeting publications are to be approved by the Central Office before printing or distribution.
- Work with any Executive Board members within your Region to possibly present a workshop and/or inform attendees of Association activity and board updates.
- Introduce any AFA Leadership (including Central Office staff and Executive Board members) in attendance at the State/Regional Meeting and indicate their responsibilities to those in attendance.
- Market AFA membership to non-members through State/Regional Meeting opportunities. Request membership materials from the AFA Central Office.
- Display or distribute promotions for AFA programs including the upcoming AFA Annual Meeting. Contact the AFA Central Office for materials at least six (6) weeks ahead of your State/Regional Meeting.
- All AFA forms and final reports must be submitted to the Regional Director within 30 days following the State/Regional Meeting. All receipts/invoices, copies of State/Regional Meeting materials, and copies of invoices should be included.

SAMPLE STATE/REGIONAL MEETING TIMELINE

AT LEAST Six Months Prior:

- Begin considering the idea of coordinating a State/Regional Meeting
- Explore partnerships, locations (hotel, college/university, fraternity/sorority headquarters), themes, etc.
- Contact Regional Director for more information and to review past State/Regional Meeting information
- Prepare for promotion of the event at the next Annual Meeting (specifically during Regional Meeting)
- Create a timeline for planning and implementation

Four Months Prior

- Have AFA Central Office approve and sign ALL contracts
- Establish State/Regional Meeting committees with job responsibilities delegated
- Promote State/Regional Meeting at AFA Annual Meeting, through *Association Update*, or Regional email
- Meet with host (hotel, college/university, fraternity/sorority), food service, parking, etc.
- Create tentative schedule and estimated budget sheet

Three Months Prior

- Email/mail a call for educational sessions and discussion topics
- Begin meeting bi-monthly with State/Regional Meeting committee
- Provide the Central Office with registration details in order to set-up on-line registration (dates, fees, descriptions, etc.)

Two Months Prior

- Email/mail State/Regional Meeting registration web links
- Call area institutions/organizations and invite personally. Focus on individuals who are not AFA members
- Request display materials from AFA Central Office
- E-Mail educational session presenters confirmation
- Weekly committee conference call meetings

One Month Prior

- Registration deadline/late registration begins
- Work with Central Office to cut checks for any vendors who need payment before/at meeting
- Make sure Central Office approves State/Regional Meeting materials before they are sent to print
- Set up on-line State/Regional Meeting evaluations

One Week Prior

- Schedule “work days” for collaborative labor intensive jobs
- Ensure educational session and overall State/Regional Meeting evaluations are ready

Following (30 days after the close of the State/Regional Meeting)

- “State/Regional Meeting-in-review” meeting with Coordinator and committees
- Write thank you notes to those involved
- Summarize State/Regional Meeting evaluation results. Share with appropriate parties.
- Submit State/Regional Meeting overall summary and evaluation results including meeting schedule and financial information to Regional Director and Vice President for Membership
- Email/mail information and photos to AFA Central Office
- Submit any unpaid invoices to the Central Office for payment

SAMPLE STATE/REGIONAL MEETING COMMITTEE JOB DESCRIPTION

STATE/REGIONAL MEETING COORDINATOR/CO-COORDINATOR(S)

The State/Regional Meeting Coordinator shall oversee all State/Regional Meeting committees and State/Regional Meeting activities. Specifically, the Coordinator shall develop the State/Regional Meeting budget and submit all appropriate reports to the Vice President for Membership and/or Regional Director and the AFA Central Office. S/he shall be responsible for making all of the necessary arrangements for State/Regional Meeting facilities including but not limited to: location, room rates, registration location, and meeting rooms. Necessary arrangements will also be made for State/Regional Meeting meals, parking, and identifying keynote and program presenters. Other responsibilities include maintaining regular contact with the Regional Director, previous State/Regional Meeting Coordinators, Vice President for Membership and AFA Central Office. S/he will work with the Central Office to set up online registration. The State/Regional Meeting Coordinator is also the liaison with the hotel/college/university/fraternity/sorority personnel, if applicable.

EDUCATIONAL PROGRAMS COMMITTEE CHAIR

The Educational Programs Committee Chair will be responsible for all programming components of the State/Regional Meeting, including soliciting program proposals, coordinating the selection of the State/Regional Meeting education programs, and scheduling all State/Regional Meeting activities and programs. Specifically, the Educational Programs Committee Chair shall send the call for programs to State/Regional members, send confirmation to program presenters, make all necessary audiovisual arrangements prior to the State/Regional Meeting, meet on-site with State/Regional Meeting presenters to answer questions and confirm any requests.

Additional responsibilities include making signs for State/Regional Meeting activities/programs (in conjunction with the Publications Coordinator), and ensuring proper room set-ups for education programs.

REGISTRATION COORDINATOR

The Registration Coordinator shall be responsible for all State/Regional Meeting registration duties and responsibilities. The Registration Coordinator will be the liaison with the AFA Central Office regarding registration rosters and should maintain up to date records of State/Regional Meeting registrants (registration list, payments, etc.). Additionally, a systematic and organized method of State/Regional Meeting check-in procedures shall be established for the State/Regional Meeting. The Registration Coordinator shall ensure that the registration headquarters are adequately staffed during the State/Regional Meeting.

PUBLICATIONS COORDINATOR

The Publications Coordinator shall be responsible for the development and compilation of the registration/educational program/presenter signs, meals tickets, banners, registration roster, call for programs, and any other electronic or printed materials (including website). The Publications Coordinator must follow all regulations in the AFA Visual Standards Manual. The Publications Coordinator will ensure that all State/Regional Meeting publications are approved by the Central Office before printing or distribution. Websites must be approved before publicizing the link.

EVALUATION COORDINATOR

The Evaluations Coordinator works with the Educational Programs Committee Chair to create a program evaluation and takes the lead on the overall State/Regional Meeting evaluation forms. S/he is responsible for compiling overall and individual evaluations.

State/Regional Meeting Finances

It is important that you monitor your budget closely! This section will help you understand how to get bills paid, where to submit paperwork for reimbursements, and guidelines on setting fees.

STATE/REGIONAL MEETING REGISTRATION AND REIMBURSEMENT

All registration will go through the AFA Central Office, thus funds will be processed directly through the Central Office. Even so, you are still responsible for maintaining your budget! Make sure that you keep track of how much money is coming in, versus how much money you are sending out.

The AFA Executive Director and the Vice President for Administration and Finance will assist State/Regional Meeting Coordinators in paying State/Regional Meeting related expenses. **The State/Regional Meeting Coordinator will be responsible for approving all expenses and tracking expenses in the State/Regional Meeting budget.**

Central Office will pay:

1. Direct invoices – State/Regional Meeting invoices that are directly paid to the vendor.
Invoices can be emailed or mailed to the Executive Director at:

Linda Wardhammar
Executive Director
Association of Fraternity/Sorority Advisors
9640 N. Augusta Drive, Suite 433
Carmel, IN 46032

Note - All invoices will be paid by either check or credit card. Allow 3 business days for processing.

SUGGESTED STATE/REGIONAL MEETING REGISTRATION FEE STRUCTURE

Fee Schedule for State/Regional Meetings

Member Rate = Regular State/Regional Meeting registration fee as established by State/Regional Meeting Coordinators and Regional Director and approved by Regional Director and Vice President for Membership from the point of registration open to 1 day before the State/Regional Meeting

Non-Member Rate = Registration fee for non-members of the Association

On-Site Rate = Regular or Non-Member State/Regional Meeting registration fee plus \$10 on the day of the State/Regional Meeting

The applicable registration rate for a State/Regional Meeting participant is determined by day that online payment was made or payment is postmarked to the Central Office.

Tax Exempt Status

AFA has tax exempt status in some states. For more information, contact the AFA Central Office.

Logistics

This section has answers to frequently asked questions around who to contact with questions, exhibitors, State/Regional Meeting traditions, and more.

IMPORTANT CONTACT INFORMATION

Utilize your Regional Director and Vice President for Membership! Ask questions and seek advice! Also, make sure you include them in working with outside vendors (especially anyone that requires a contract) and before selecting State/Regional Meeting dates.

The contact information for these individuals can be found on the AFA web site.

AFA REGION EMAIL LISTS

AFA has specific Region emails. Contact your Regional Director to learn how to utilize this resource. Also, please realize that you cannot rely solely on the e-mail network systems for communication and should consider other forms of social media. Some AFA Members choose not to be a member of the e-mail network.

STATE/REGIONAL MEETING EXHIBITING GUIDELINES

At times, AFA State/Regional Meeting Committees may have the opportunity to enlist outside financial support of State/Regional Meeting events or products. The decision to accept an exhibitor or sponsorship opportunity must be fully grounded in the mission of the Association, the Statement of Ethical Standards, and the core values of the Association with the best interest of the membership kept foremost in the decision-making process.

It is up to the State/Regional Meeting Coordinator's discretion to accept or not accept an exhibitor or State/Regional Meeting sponsorship opportunity.

AFA Associate Members should be included in the bid process for State/Regional Meeting materials. For contact information of current AFA Associate Members, please contact the AFA Central Office or go to the AFA website for an Associate Member list.

Useful Forms and Templates

SAMPLE STATE/REGIONAL MEETING OUTREACH LETTER

Dear [First] :

Hello! My name is [Insert Name] and I am the [Insert Title] at [Insert College/University or Organization]. I also serve as the Coordinator of the [Insert Name of Area] State/Regional Meeting for the Association of Fraternity/Sorority Advisors. The purpose of this letter is to acquaint or reacquaint you with Association of Fraternity/Sorority Advisors, and to invite you to attend our State/Regional Meeting on [Insert Date] in [Insert Location].

The State/Regional Meeting is a great way for you to gather and exchange new ideas for your programs, network with other fraternity/sorority life professionals, and bond as a staff on this off-campus experience. Whether your job description is 100% or 10% fraternity/sorority life, the programs offered at our State/Regional Meeting can benefit you. A bonus of attending an AFA State/Regional Meeting is our location. Many times you can “drive in” to the Meeting and minimize your travel expenses.

Our next State/Regional Meeting will be held on [Insert Date] in [Insert Location]. I highly encourage you to attend! It will be a great opportunity to reunite with old AFA friends, if it has been a few years since your last State/Regional Meeting, or to build new networks with professional staff and volunteers that work with fraternities/sororities in our area.

There are many added benefits of being a member of AFA besides attending the State/Regional Meeting. Members of AFA receive resources to benefit their daily work. All members receive *Perspectives*, the Association’s magazine which is published four times a year, and the *Association Update*, our monthly e-newsletter. Our website, www.fraternityadvisors.org, contains information about the Association, contact information for officers and committee chairs, an on-line membership directory, Association resources, job postings, links to related organizations and much more. The Association holds an Annual Meeting once a year and Regional and/or area meetings each summer.

I wish to extend an invitation to you and/or any members of your institution/organization to get involved with the Association. I have enclosed my business card. Please do not hesitate to contact me! I look forward to hearing from you or meeting you in [Insert Location] for the State/Regional Meeting in [Insert Month]!

Sincerely,

[Name]
AFA [Insert] State/Regional Meeting Coordinator
[Professional Title]
[Professional Organization]

SAMPLE CALL FOR EDUCATIONAL SESSIONS TEMPLATE (Electronic preferred)

All State/Regional Meeting Sessions will be 60 minutes in length. Please complete the information below.

- 1. Title of Presentation: (Limited to 60 characters)
- 2. Program Abstract: (maximum of 300 words. Please describe your goals, content and method of presentation.)
- 3. Program Description for Program Book: (maximum of 50 words) type or print clearly in the space provided below. (This will be used for the printed State/Regional Meeting Program if your proposal is accepted.)

- 4. Presenters:
 - 1. Name: _____ Position/Title: _____
AFA Member? yes no
 - 2. Name: _____ Position/Title: _____
AFA Member? yes no
 - 3. Name: _____ Position/Title: _____
AFA Member? yes no

- 5. Contact Person for your Presentation:
 - Name: _____ Inst./Org.: _____
 - Phone: _____ FAX: _____ E-mail: _____

- 6. Audio-Visual Equipment required:

Please note: We will do our best to accommodate all AV requests; however, we have limited access to LCD Projectors. Please clarify if use of an LCD Projector is necessary for your presentation, or if another AV option is possible. Presenters will be responsible for providing own laptop, if needed.

Should this program be selected // We agree that:

- 1. All presenters listed in this proposal have agreed to participate in this presentation.
- 2. All presenters agree to pay full State/Regional Meeting registration fees (including membership fees if I choose to join the Association).
- 3. I (with my co-presenters) am responsible for all printed materials for this session.
- 4. All presenters agree to provide appropriate reference/citation when using/quoting the work of others as part of the proposed presentation.

Signature: _____ Date: _____

Phone: _____ Email: _____

SAMPLE ONE-DAY SCHEDULE

In order to reduce costs for individuals, a State/Regional Meeting should be held in one day so that individuals do not have to incur additional fees.

9:30-10:00	Registration
10:00-10:15	Welcome and Introductions
10:15-11:15	Opening Keynote
11:15-12:15	Educational Session 1
12:15-1:30	Networking Lunch
1:30-2:15	Educational Session 2
2:15-3:00	Educational Session 3
3:00-3:15	Break
3:15-4:00	Best Practices Session
4:00-4:45	Educational Session 4
4:45-5:00	Wrap-Up and Evaluations

Planning a State/Regional Webinar Program

TECHNOLOGY FOR WEBINAR

There are many institutions/organizations that provide their own virtual classroom tools that both faculty and staff have access to use. Popular programs include Elluminate, Adobe Connect, Fuze Meeting, Vyew, etc. Consult with your institution or organization's instructional design and technology department to see what is available for usage.

EXPECTATIONS FOR AFA STATE/REGIONAL MEETINGS

- Market AFA membership to non-members through State/Regional Webinar opportunities. Request membership information from the AFA Central Office.
- Work with any Executive Board members within your Region to possibly present a webinar and/or inform attendees of Association activity and board updates.
- Ensure that all meeting publications follow the guidelines set in the Visual Standards Manual. All State/Regional Webinar publications are to be approved by the AFA Central Office before distribution.
- All State/Regional Meeting Coordinator and State/Regional Meeting staff must be AFA members and pay full State/Regional Webinar registration.
- Budget responsibly. The State/Regional Meeting Coordinator(s) is responsible to oversee expenses for the State/Regional Webinar. The event must be self-sustaining. All deficits will be the responsibility of the Coordinator's institution/organization.
- A tentative budget must be submitted to your Regional Director and the Vice President for Membership BEFORE setting the State/Regional Webinar fee.
- The AFA Executive Director must sign ALL contracts on behalf of the Association.
- All AFA forms and final reports must be submitted to the Regional Director within 30 days following the State/Regional Webinar. All receipts/invoices, copies of State/Regional Webinar materials, and copies of invoices should be included.
- AFA Associate Members should be included in the bid process for State/Regional Webinar materials. For information on current AFA Associate Members please contact the AFA Central Office or visit the [AFA website](#).

SAMPLE WEBINAR MEETING TIMELINE

AT LEAST Six Months Prior:

- Begin considering/developing assessment tools to obtain topic area, find “hot topics” of the region to address during the webinar series
- Contact Regional Director for more information on trends/demographics of the Region
- Prepare for promotion of event at next Annual Meeting or through *Association Update*
- Create a specific State/Regional Webinar timeline for planning and implementation
- Administer assessment tool to Region at Annual Meeting (if time permits – contact Regional Director)

Four Months Prior

- Review assessment tool and determine topic areas
- Develop learning outcomes for each of the topic areas
- Submit topics to Vice President for Membership and Director of Programs for approval
- Establish committees, have committees formed with job responsibilities delegated
- Create tentative schedule for series

Two Months Prior

- Obtain presenters for various topic area covered
- Review the topic areas with presenters and assist as they create the presentations to assure the learning outcomes are met
- Call area schools/organizations and invite personally
- Promote and advertise the Webinar (e.g. ask the Regional Director to send out announcement in their monthly updates, Facebook, emails). Send information to Director of Member Services to be included on AFA website.
- Registration begins for the Webinar

One Month Prior

- Set up on-line Webinar evaluation
- Work with presenters on topic area and assure the learning outcomes are being met for each session
- Continue to promote and advertise the webinar series
- Obtain biographies of presenters and committee

One Week Prior

- Ensure presenters are prepared
- Have a run through with the presenters and the technology software
- Ensure evaluations are prepared.

Following (30 days after the close of the webinar)

- “State/Regional Webinar-in-review” meeting with Coordinator and committees
- Write thank you notes to those involved
- Summarize State/Regional Webinar evaluation results. Share with appropriate parties.
- Submit State/Regional Meeting overall summary and evaluation results including webinar schedule and financial information (if applicable) to Regional Director and Vice President for Membership.
- Submit any unpaid invoices to the Central Office for payment

SAMPLE OUTLINES FOR WEBINAR PLANNING MEETINGS

First Meeting

- Develop tasks for committee (i.e. creating assessment tool, marketing and publicity, timeline, etc.)
- Plan and discuss possible topic areas
- Plan time frame and future meetings
- Discuss possible presenters
- Troubleshoot to avoid problems

Additional meetings

- Remind everyone to save copies of everything for the archives and to give to next year's State/Regional Webinar Committee
- Securing presenters
- Which committee members will work on each topic?
- Publicity and marketing
- Make sure webinar evaluations are in the works
- Select someone to give the welcome/introductions/etc.
- Trouble shooting and learning technology
- Coordinate presenter preparation time

Final Meeting

- Final presentation should be ready for technology run through
- Evaluation of series
- Review attendance numbers
- Test technology

SAMPLE WEBINAR COMMITTEE JOB DESCRIPTIONS

WEBINAR SERIES TOPIC COMMITTEE

The Webinar Series Topic Committee breaks into groups according to the amount of webinars in the series. Each smaller committee is responsible for obtaining presenters for the specific topic area assigned. The committee is responsible for working with the presenters assuring the learning outcomes are satisfied and the presenters have any information needed. This group must schedule dates and times of the meetings between the presenters and committee representatives. The group will be responsible for setting the date and time of the webinar. Additionally, this group is responsible for marketing and advertising of the webinar and assessment thereafter.

REGISTRATION COORDINATOR

The Registration Coordinator shall be responsible for all Webinar registration duties and responsibilities. The Registration Coordinator will be the liaison with the AFA Central Office regarding registration rosters and should maintain up to date records of Webinar registrants (registration list, payments, etc.). Additionally, a systematic and organized method of check-in procedures shall be established for the webinar.

TECHNOLOGY COORDINATOR

The Technology Coordinator is responsible for setting up the webinar technology initially. This person is responsible for training the other committee members on step by step procedures on using the technology. The Coordinator is to assist the committee with trouble shooting issues that arise with the technology before and possibly during the event. The Coordinator is responsible for assisting during the initial run through with technology with the committee and presenters.