

2015 APA California Conference

Conference Host Committee

SUMMARY REPORT

October 23, 2015

This page intentionally left blank

# Summary

The 2015 American Planning Association (APA) California Chapter Conference was held on October 3-6, 2015 at the Oakland Convention Center. This report was prepared by the 2015 Conference Host Committee (CHC) of the Northern Section of the California Chapter of the APA. This report presents the conference planning timeline, CHC organization, major conference activities, lessons learned, and recommendations for future Chapter Conferences. This report is designed to be a resource that can be used by the Chapter, its contractors, and future CHCs to guide and shape future efforts.

The 2015 CHC would like to thank the APA California Board, the California Planning Foundation (CPF) Board, Conference Coordinator Angie Spearman and the HPN Global team, Conference Graphic Designer Dorina Blythe of GranDesigns, Conference Accountant Francine Farrell of ATEGO Resources, and Administrative Support by Laura Murphy of New Horizon Enterprise. In addition, the CHC recognizes the efforts of our volunteers, sponsors, exhibitors, speakers, and mobile workshop leaders who helped ensure the 2015 APA California Conference was an excellent success. Special thanks to APA California President Hing Wong, AICP; APA California Vice President (VP) of Conferences Betsy McCullough, AICP; and APA California – Northern Director, Andrea Ouse, AICP for their ongoing support, guidance, and assistance over a 2-year period.

From July 2013 to October 2015 the CHC strove to ensure that the conference was an open participatory process that connected the Conference to the surrounding community and the Northern. Throughout the conference planning process, all CHC meetings were held in the round to ensure everyone was a part of the effort. At an early meeting CHC members were asked to provide positive phrases and images of the host city. Through this exercise the conference theme of “Rooted in AuthentiCITY” was developed and our logo selected through and open logo design contest in May 2014. We then developed conference materials and sponsorship information for the 2014 APA California Conference in Anaheim in September 2014.

The programs and mobile workshop committees worked tirelessly to promote the conference and seek submissions for the conference by February 6, 2015. As a result, we had a record setting number of session (346) and mobile workshop (50) proposals submitted. In the end 133 sessions and 16 mobile workshops were offered. In addition, the planner’s guide committee drafted a 60 page guide to Oakland’s neighborhoods, surrounding cities, the Bay Area, and the Northern Section that provided conference participants an overview of the Section.

Thus the combination of local resources, section volunteers, and chapter support ensured that the 2015 conference continued to advance the planning profession while remaining firmly associated with the vibrant, revitalizing energy of Oakland. We hope that the living, active, and participatory City of Oakland provided an excellent backdrop and laboratory to show off the latest innovations in our field.

# Timeline and Major Activities

The 2015 conference was roughly broken up into six periods. Each corresponds to a major activity, task, or milestone for the conference. However, all committees were active during all per

## Initial CHC Organization

This period lasted from July to September 2013 and during this time, the Northern Section established the CHC, selected its co-chairs, established the nine CHC sub-committees, and appointed committee chairs.

The initial conference co-chairs were Erik Balsley, AICP and Hing Wong, AICP. Upon Hing’s election to APA California Chapter President, Hanson Hom, AICP and Darcy Kremin, AICP were appointed co-chairs with Erik. Both Darcy and Hanson are previous Northern Section Directors and have worked with the Chapter in the past while Erik is the current Northern Section Director Elect. The combination of past experience, dedication, and enthusiasm of the co-chairs ensured that there was a fun, focused, and balanced approach to the conference. With three co-chairs, it was possible to shift work so that no one chair felt burnt out.

## Committee Set-up, Theme, and Logo

During this period the CHC was focused on setting up its committees and developing a conference theme and logo. This period ran from September 2013 to May 2014 and covered the first four CHC meetings:

* September 13, 2013
* November 16, 2013
* February 2, 2014
* April 5, 2014

### Committees and chairs

By the November CHC meeting the following committees were established and their chairs determined by the February CHC:

* Diversity – Miroo Desai, AICP
* Fundraising/Sponsorship – Jean Long
* Hospitality – Florentina Craciun, AICP
* Merchandise – Jonathan Schuppert, AICP
* Mobile Workshops – Mika Miyasato, AICP
* Planner’s Guide – Jackie Yang, AICP
* Progams/Sessions – Juan Borrelli, AICP
* Publicity – Erika Sawyer and Brian Soland, AICP
* Volunteers – Syd Wayman

Each committee will be discussed in later sections of this report.

### Theme Selection

During the September and November 2013 meetings the CHC focused on theme development. At the first CHC meeting, participants were asked to provide positive and unique words or phrases that characterized Oakland. Prior to CHC selection, the Chapter had sent out an email to its members asking them to weigh in on whether to hold the conference in Oakland or San Francisco. While Oakland came out slightly ahead of San Francisco, it was noted that several negative images were presented in the comments of the survey. As a result, the co-chairs decided it would be appropriate to present a counter-narrative to many prevailing negative images of the host city.

After the initial exercise in September 2013, the CHC met in November to complete a dot exercise to identify the words and images most strongly associated with Oakland. Each participant was given 5 dots with which they could choose the themes they most strongly liked. The top five selections were: authenticity, branches/tree, diversity/equity, metamorphosis, rebirth, and resurgence.

Between November 2013 and February 2014, the CHC co-chairs discussed the phrased and ultimately decided on the theme of “Rooted in AuthentiCITY.” It combined natural imagery with urban contexts. Also as roots can refer to one’s involvement in a community and place, it also highlighted the personal connections that are integral to planning. The theme was presented and approved by the CHC at the February CHC meeting.

### Logo Competition

Between the March 31 and May 2, 2014, a logo competition was held to select a logo that best captured the conference theme. The guidelines for the competition were placed [**online**](http://norcalapa.org/wp-content/uploads/2014/03/APA-California-2015-Conference-Logo-Competition-Guidelines.pdf) and included a list of required text elements, technical specifications, and submission requirements

15 volunteers from the publicity, merchandise, and programs committees met on May 9, 2014 to choose the conference logo from 10 entries. The group discussed and evaluated each logo based on its overall design, ability to be reproduced at different sizes, and correlation to the conference theme. Amie Krager, a Graphic Designer from CirclePoint, designed the winning entry. Her logo shows the Oakland skyline while emphasizing the city’s solid roots. The colors communicate a sense of pride, and rays symbolize the community’s potential and growth. It became an essential symbol of our conference.

## Setting the Stage

The efforts between the logo selection and the 2014 APA California Conference in Anaheim were designed to set the tone for and raise interest in the 2015 conference. These efforts led to the initial marketing and presentation of the conference. This period included the following CHC meetings:

* June 7, 2014
* August 9, 2014

The Oakland booth at the 2014 conference was located at the entrance to the main ballroom at the Disneyland Hotel which provided us great visibility. The merchandise committee selected and purchased a few items to promote the conference. These included a save-the-date coaster with the conference logo and fortune cookies with Oakland themed fortunes.

The publicity committee developed an interactive exercise for the conference postcard to reflect the do-it-yourself (DIY) ethos of Oakland. A stamp of the conference logo was created. Conference attendees then could take the stamp and place it on a blank postcard with the conference information printed on it to have a reminder for the conference. If they desired they could also write a message on the front of the card regarding Oakland. The committee also set up the Section’s conference webpage and coordinated the set-up of the Chapter’s site as well.

Both the mobile workshops and sessions committees prepared call for presentation sheets. For mobile workshops, a system separate from the session submittal website was set up. The sessions committee also proposed two new session formats in their call for presentations. These formats were a salon which was a shorter moderated discussion of a topic and a workshop which provided more hands-on exercise work. As a result of these formats, the sessions committee became known as the presentations committee.

The presentations committee also proposed six conference tracks that were presented to and approved by the CHC. The tracks built on the imagery in the logo and related to the tree and root imagery:

* Roots and Foundations – planning essentials, and planning 101s.
* Rings and Forms – placemaking and design, smart growth, and TOD.
* Branches and Specializations
* Green Canopy – environmental planning, sustainability, and green practices.
* Harvest and Diversity
* Beyond Forests – Innovation Frontiers – new and emerging innovations and technologies.

The fundraising committee used this time to prepare an initial sponsorship packet that contained sponsorship levels and costs. An initial internal CHC spreadsheet was prepared to identify contacts at each potential firm and CHC members who could contact the firm.

Diversity and hospitality both worked on logistics for the Diversity Summit and Opening Reception, respectively. Planner’s Guide also met to discuss neighborhoods and begin drafting text.

## Conference Content

After the Anaheim conference the CHC focused on:

* fundraising,
* publicizing the February 6, 2015 deadline for mobile workshop and presentation proposals,
* determining the topic and identifying panelists for the Diversity Summit, and
* selecting a site for the Opening Reception.

These efforts covered the following CHC meetings:

* October 11, 2014
* December 13, 2014
* February 7, 2015
* April 4, 2015

We met the internal fundraising goal of soliciting $80,000 by April 2015.

At the February 6, 2015 meeting both the mobile workshops and presentations committees reported record-setting amounts of proposals had been submitted. Over 330 sessions and 50 mobile workshop proposals were received. By mid-April both committees had narrowed down these numbers to 133 presentations and 16 mobile workshops. These selections were made so the first conference-at-a-glance was ready by the end of May 2015.

The hospitality committee selected the Oakland Museum of California as the site for the Opening Reception during this period. They worked with the Conference Coordinator to complete the necessary contracts and select the caterer for the event. The Diversity Summit topic was selected – “Gentrification Mosaic: Conversations on Displacement of Economic and Social Capital.” Committee members also helped select the presentations in the Harvest and Diversity conference track.

Merchandise helped the CHC select the conference items that were provided by our sponsors, designed the volunteer shirt, and ordered the notebook that we provided to CHC members and volunteers.

## Registration

The final months before the Conference were spent working to meet our sponsorship goals, produce the Planner’s Guide, and keep the group up to date on the latest registration figures. The following CHC meetings occurred over this period:

* June 6, 2015
* August 8, 2015
* September 12, 2015

During this time the Conference Coordinator, Graphic Designer, and Accountant were active making sure people could register, that the hotel blocks were booked, and that conference publications were ready. Of note during this period we had met the hotel room night guarantees and exceeded our $136,000 sponsorship goal

## Conference

For an overview of the Conference please refer to the [**Conference-at-a-Glance**](http://www.apacalifornia-conference.org/conference-at-a-glance.php).

# Overall Recommendations

The following recommendations are presented in alphabetical order by topic. These are some observations from the CHC co-chairs. The reports for each subcommittee follow and contain specific committee recommendations.

## Budget

Despite our best efforts there were unexpected expenses. There will inevitably be components of this conference that are not specified in your contracts. Be reasonable when these expenses arise. For instance, early on, we discovered that the pipe and drape behind the booths in the exhibitors’ hall, also known as drayage, was not part of the standard contracts with the hotel. This was an unexpected $5,000 expense.

Later, when an attachment from our opening reception contract was finally received, we discovered we had a $10,000 expense for lighting. However, HPN reduced that expense to $8,000. In essence, it is helpful to recognize that these expenses will arise and to constructively address them with the Conference Coordinator. Do not cast blame when these issues arise – just take care of them. Also, this emphasizes why the sponsorship goal is important.

## Committees

Based upon the work of the conference, the two committees that should have co-chairs are programs and mobile workshops. During the selection and room assignment process it might be good to have the ability to split the work up to avoid overworking one chair. Mobile workshops are also logistically challenging and co-chairs might be needed.

After the co-chairs decided to not sell conference merchandise, the role of the merchandise committee diminished. As the merchandise items that were purchased used the logo, merchandise and publicity should be merged into one committee. This committee might be better labeled “Branding.” This committee does not need two co-chairs.

## Coordination

Due to the change in conference coordinators that occurred in mid-2014, it took some time to figure out the role of each Contractor in the conference. Once the CHC co-chairs are selected, it might be a good idea to have an APA, CHC, and Contractors call to introduce each other and roles.

## Editing

We did not have a dedicated person to edit all conference materials. It may be useful to have one person identified as the editor with final review for all projects. In the end Erik reviewed the Planner’s Guide, Hanson reviewed the Program, and Darcy reviewed the program and schedule. However, by not having a dedicated editor everyone reviewed all documents specifically the program and no detail was overlooked.

Therefore, whether you decided to have an editor or not the important thing is to received draft materials early and review them. If possible, it would be ideal to receive these files in their native format. We had to make edits in PDF files and then send them back to the Conference Coordinator. This made the process a little more time-consuming so you need to plan for extra time for editing if you do not have the native format files.

## Flexibility

While the CHC strove to meet all deadlines and to get things done on time – there were always unexpected details. In order to meet deadlines, the CHC needs to be nimble and flexible. This adaptability will allow you to delegate tasks and be able to nimbly address issues as they arise. Be prepared to shift lanes on the highway that is your conference planning effort.

## Food

Food is expensive. Be prepared for $30 box lunches and $50 plates of chicken. You may wish to offer something than a standard sit-down plated lunch. You may wish to not offer lunch one day to allow attendees to go outside the host hotel for food. This may not be possible in resort facilities, but if the conference is in a downtown area with restaurants it may be possible.

## Logo and Theme

The theme exercise was very useful and helped tie our conference to the host city. Other Conferences should complete a similar exercise. It not only got the CHC excited about the conference it allowed everyone to participate and feel as if they were a part of the theme selection. It also gave CHC members a chance to get to know each other.

The log contest was also successful. However, the specifications we provided did not exactly match those of the Chapter. As a result, there was discussion over what should and should not be in the logo. The new conference manual clarifies these requirements. If a contest is pursued, the local CHC should ask for the correct specs from the Conference Graphic Designer.

Another quirk of our logo was that it used proprietary fonts. We had to purchase a set of the fonts for the Graphic Designer but did not purchase an additional license. If a contest is pursued, a list of preferred fonts should be provided. If the designer uses other fonts, they should provide the font information with their entry.

However, one successful aspect of our logo was that it was limited to 4 colors. This allowed us to more easily place the logo on print, web, and merchandise media. We also requested a greyscale and black and white version.

## Opening Reception

You should secure the opening reception location as soon as possible. When you do sign the contract, make sure all attachments are provided. Also, it is likely the Conference Coordinator or Chapter VP of Conferences will need to sign the contract. Provide adequate time to obtain all signatures.

## Registration

The registration portal should be set up as soon as possible to allow public sector employees to adequately budget for staff to attend. We had a relatively late date for registration in late May which created problems for some public sector planners. It may also be good to extend the normal registration deadline to a week before publication and merchandise orders are made. This will provide a better figure for the Conference Coordinator to use when finalizing plans.

## Schedule

From the beginning we had a preliminary table that blocked out the conference days. This was useful as it allowed us to strategically plan each day. We had ten session blocks that allowed us to have 13 presentations in each block. Depending on how many presentation proposals are received, you can plan how many sessions you want in each block.

## Students

Rather than program a full day of student specific events, it may be easier to have students attend the first day of the conference free. It can be difficult to program specific student events during these times. It would also allow future conferences to potentially add 2-3 additional blocks with sessions for professionals.

It was felt that many students did not appreciate the effort it took to organize events for them. It may be useful to have 1-2 sessions in each block on the first day with general professional skills such as resume writing, salary negotiation, and an introduction to APA. The first day could still be made free for students.

# Committee Reports

The committee reports will be presented alphabetically.

## Fundraising Committee

* The Fundraising Committee consisted of 5 Conference Host Committee Members, including Jean Long, Fundraising Chair. Jean worked closely with Darcy Kremin, Co-Chair, for most of the fundraising efforts. Jean also worked with Planner’s Guide to provide photos and neighborhood descriptions and assisted minimally with Volunteers/Student Day Committee by providing advice and volunteering for registration on Sunday 10/4.

### Goals

* Raise $136,000 as a fundraising goal (80% of potential sponsorships based on available levels)
  + Exceeded fundraising goal with $141,150 (additional $5,150)
* Ensure sponsor satisfaction with sponsorship benefits according to level
  + Addressed majority of sponsor concerns around exhibitor booth space

### Major Activities

1. Contact firms, agencies, city departments, etc. to ask about sponsorship for conference both by e-mail and by phone.
2. If interested, sent brochure and details of conference. Talked to sponsors on the phone directly to discuss pros and cons of each sponsorship level. Encouraged them to donate more for exhibitor booth package.
3. Organized Fundraising Committee meetings
   1. About 3 over the phone in late 2014
   2. About 4 in person before CHC meetings on Saturday in late 2014
   3. Stopped hosting committee meetings in early 2015
   4. Committee mostly passive except for members who got their own firms to participate
4. Kept track of Sponsor Prospects and Paid/Unpaid sponsors.
5. Verified payments with Francine Farrell; Coordinated logo and program advertisement with Dorina
6. E-mailed registration discount codes and Exhibitor Manual to all sponsors
7. Kept track of sponsor benefits according to their sponsorship level
8. Followed up on all sponsor contact leads
9. Checked Registration Reports from conference organizers for consistency in sponsor registrations

### What Worked

* Using Google Spreadsheets to coordinate with Committee and Co-Chairs on tracking sponsors and dollars amounts
  + Useful to share information with others as needed
  + Can access information easily
* Asking CHC members for all sponsorship leads
  + Fundraising Chairs should ask for contact and follow-up; don’t rely on CHC member, but do provide a template e-mail for them to reach out
* Converting Sponsorship Brochure to table format
  + Helps sponsor compare across sponsorship levels depending on benefits
  + Simplified way to view details instead of paragraph form
* Color coding badges is an easy to way to see status of attendee
* Working well with Francine and Dorina. Important working relationships. Lots of reliance on them to process payment and graphics. Must provide clear instruction.
* Having the freedom to answer conference related e-mails during work, but minimize this as much as possible
* Allocating time after work to address e-mails

### Lessons Learned

* Keep the sponsorship levels simple to minimize number of categories that sponsor can choose from (eliminate afternoons breaks and table tops; encourage sponsors to do booth only)
* Ensure follow through on all benefits promised to sponsor and expect last-minute tasks related to this (e.g. WiFi for Nelson\Nygaard or lunch tickets entitled to each event package sponsor)
* Work with conference organizer on clarity over registration types and levels (e.g. complimentary exhibitor badges associated with table, but does not permit entrance to sessions)
* Don’t rely on e-mails to outreach to sponsors. Get a name and a phone number, call them to ask about sponsorship, then say you will follow-up on details via e-mail.
* Don’t rely on CHC members to do direct outreach. They are less invested in fundraising because it’s not as “exciting” as other committees.
* Key is to have very motivated Fundraising Chair and Co-Chair. Most of our success is attributed to the excellent working relationship between Darcy and me. We worked near each other and consulted each other frequently.

### Other General Observations

1. Start early! You cannot start early enough in this process, but start AFTER previous year’s conference is completed.
2. Tap previous year’s sponsors. They are most likely to sponsor again.
3. Find 2-3 dedicated volunteers who will work only on fundraising.
4. Set sponsorship levels at reasonable rates. $4,000 was ok, $6,000 seemed too high.
5. Bundle the booths with other benefits. There are sponsors who simply want a booth, but it’s good to package them with the other things.
6. Figure out a price for a “double-wide” booth. Several sponsors like to have 2 spaces.
7. You will have to do a lot of haggling.
8. Keep track of sponsor benefits. Try to get registration codes around the time that the registration portal is open.
9. Lots of details are unexpected.
10. Use social media as much as possible. Depending on the personality of your publicity committee, you can either use your own personal accounts or maintain consistent communication with Publicity of what you want advertised.
11. Send introduction e-mail (to get them interested), payment options, confirm payment e-mail from Francine, then acknowledgement letter for all benefits
12. Get rid of other levels
13. Reduce printed signs that we have to do, remove the signs,
14. Projections, mobile app advertisement
15. Conference sponsor, not just chapter - both sides should promote on websites
16. Make sure to have drayage company for booths, already contracted

## Hospitality Committee

The Hospitality Committee was comprised of one chair and six committee members. We were tasked with planning the Opening Reception, planning a second event if deemed necessary and brainstorming speakers for the opening keynote and plenary lunches.

### Goals

Opening Reception

* Our first and most important goal was to plan an awesome opening reception. We wanted to find a location that represented Oakland and our theme “Rooted in AuthentiCity.” We also wanted the food and the décor to emphasize our theme. We selected a caterer that used local ingredients and that planned the menu around our theme. The Oakland Museum of California represents Oakland and has been an anchor in the community. We feel that we accomplished our goal of throwing a party that allowed people to network, showcased Oakland, and was true to our theme.
* Our second goal was to stay on budget. We believed that the venue itself was the entertainment with the gardens and the History of California gallery. Therefore, we did not feel the need to get other forms of entertainment, which helped us stay within budget. We were able to negotiate our catering and light contract and found a band that stayed within our budget. We think overall that staying within budget was well emphasized and we were able to accomplish this goal.
* Our third goal was to find a location that would be easy to get to from the conference center. We wanted people to be able to walk through Oakland to get to the venue. We also wanted to make sure that we have a variety of transportation options from biking, to walking, to driving and “carpooling” via the shuttle. We accomplished this goal by having a location within a 15 minute walk of the conference center and providing a good variety of transportation options.

Second Event

When we started planning our second event we wanted to make sure we did not compete with any of the other events/happy hours. While brainstorming what that second event would be (a happy hour, a movie at a near by theater, a passport for people to step into the community and enjoy the local restaurant scene) we decided that it would conflict with all the other planned events and we decided not to do it.

In hindsight we think that it might have been nice to have the passport to encourage people to explore more or have a non-drinking event set up for those who do not. In the future, to augment the information in the Planners’ Guide, it would be helpful to offer a handout listing addresses and a brief description for restaurants and bars within walking distance of conference hotel.

Keynote Speakers

* We were tasked with brainstorming names for the special sessions. A list was comprised and given to the conference chairs.

### Major Activities

* Organizing the Opening Reception.
* The most intensive time for us were choosing of the venue and signing the contracts. We met as a committee to visit potential venues and make a decision regarding the venue. We communicated via email as needed and had a conference call about once a month to select a caterer, menu and for general updates. After we selected a caterer and a venue the committee chair coordinated with the conference consultant to sign contracts, check the budget and whatever else was needed.

### What Worked

* Opening Reception
  + The venue represented Oakland and our theme.
  + The venue served as the décor and we did not need to invest in too much in décor or entertainment.
  + It allowed people to chat and network.
  + We stayed on budget.
  + The food represented Oakland
  + Having multiple food stations in a location large enough to easily accommodate attendees made it easy for all of the guests to get ample food and drink without crowding or running out of food or drink.
  + While some attendees walked to the opening reception there were more than enough buses available to provide transportation to the reception.
  + If reception venue doesn’t offer coat-check or lockers as the Museum does, probably a good idea to make provision for this feature to avoid the need for attendees to carry around knapsacks and conference bags.
  + Music was definitely audible but not so loud that it drowned out conversation, which is one of the main attractions of the opening reception.

### Lessons Learned

* Make sure that the hospitality committee has a good understanding of the budget and the goals for the opening reception.
* Make sure to communicate who is in charge of the keynote search and keep the hospitality committee engaged if any of these tasks fall with them.
* Be in good communication with the venue and make sure you know if you need extra lights, extra volunteers, if you have to pay for parking or valet, etc.
* Get in writing early on what the venue will provide.
* Be in communication with the caterer regarding food, drinks and décor.

### Other General Observations

* We worked with the Volunteer Committee to make sure we have volunteers at the opening reception.

## Merchandise

The fun committee was comprised of five people. The committee was in charge of researching and ordering merchandise to promote the conference while at the 2014 conference in Anaheim and at the 2015 conference in Oakland.

### Goals

* Promote the conference in a fun and unique way through high quality and memorable merchandise that will either be consumed immediately or reused over and over again.
  + This was met through a variety of promotional materials such as fortune cookies, coasters, pins, notebooks, t-shirts, and thank you cards.
* Find a local vendor and consider locally-made and -sourced products.
  + This was met through securing of Poppy Promos (Oakland-based company) to manage t-shirts, notebooks, and other merchandise.

### Major Activities

* Phase I (Pre-Anaheim)
  + Identify a budget for promotional materials
  + Research promotional materials and vendors
  + Coordinate with conference-approved graphic designer for layout
  + Place orders for promotional materials and help distribute at the 2014 conference in Oakland
* Phase II (Post-Anaheim)
  + Identify a budget for merchandise
  + Research merchandise for committee and volunteers
  + Place orders for merchandise and coordinate with Volunteers Committee to help distribute at the 2015 conference in Oakland

### What Worked

* + Using Google Drive to store files for budget, schedule, research, and vendor communications
  + Finding a local company to help coordinate production and provide samples

### Lessons Learned

* Communication is key. When we were looking at pin companies, we were given incorrect company information from the Anaheim committee and we were, therefore, not able to use the APA discount.
* Samples are invaluable. Being able to look at and feel the products before making a large order provides peace of mind. At a minimum, having good proofs and passing around through committee members and professionals is key.
* Coordination with the Volunteers Committee was critical to help ensure that materials were distributed. The volunteers are a tremendous resource.
* To save on the number of volunteers needed, to further reduce the financial liability of the section, and to provide more authentic merchandise, it was decided to coordinate with local businesses for producing and selling materials. After digging into the discussions deeper, several businesses changed their mind and were not interested.

### Other General Observations

* Merchandise Committee mostly worked with the Volunteers Committee for distributing materials at the Oakland conference and with the Fundraising Committee for creating and purchasing thank you cards.
* The Merchandise Committee could also be involved with (or at least be given proofs of) privately-funded swag such as bags, water bottles, and lanyards to better ensure consistent messaging and coordination.

## Mobile Workshop Committee

The Mobile Workshop Committee was comprised of 13 people. The committee was in charge of organizing fun and educational mobile workshop to showcase the Bay Area.

### Goals

* To organize 15 fun and educational mobile workshops
  + This goal was met. A total of 370 people attended 16 mobile workshops.

### Major Activities

* Drafted Call for Mobile Workshops
* Evaluated mobile workshop proposals and worked with proposers to come up with top 15 mobile workshops
* Evaluated proposed cost and proposed fees for each mobile workshop
* Worked with the proposers and Angie Spearman in finalizing logistics
* At the conference, the committee members assisted checking in attendees and sending them off
* The committee met 4 – 5 times in person.
* 2 conference calls were convened.

### What Worked

* By soliciting mobile workshop proposals, the committee was able to offer mobile workshops with a variety of topics showcasing the Bay Area’s diversity.
* Each mobile workshop had an assigned committee member so that they can go over Committee’s expectations, schedule, logistics, etc.
* Mobile Workshops were reasonably priced. Thus, many sessions were sold out or nearly sold out.

### Lessons Learned

* Mobile Workshop tickets could not be provided to attendees in time, so we used a list of attendees to check in. This system works, but it would have been easier to have names of individuals on waiting lists.
* Most people on waiting lists didn’t know how to find out about availability. We ended up taking people who showed up if a spot is available without verifying whether they were on a waiting list.
* All attendees were supposed to meet 15 minutes before the departure time. However, handful of people missed tours. It will be better to list “meeting time” opposed to “departure time”. So, the 8am departure tour will be listed as “meeting at7:45am.” In addition, it will be helpful if we can offer an option to add mobile workshop on attendees’ personal calendar. (evite and Eventbrite offer an option to add an event on Outlook, Google calendar etc.).
* Consider schedule Mobile Workshops on bikes on weekends when traffic volumes are lighter.
* Student volunteers were available on weekends, but their availability was extremely limited on weekdays. We supplemented with Committee members and other last minute volunteers. If we have known this, we would have asked more non-student volunteers early.
* Secure transit agency’s support for free or reduced cost traveling early.
* Many moderators requested or commented communication to attendees prior to the conference was/would have been extremely helpful. We recommend all moderators to generate a message to their attendees and submit Mobile Workshop Committee so that the messages will be set out to attendees.
* Review role, responsibility and schedule with other Committees (i.e., eNews, Northern News publication schedule, deadlines for finalizing conference schedule, etc.)
* Reserved seating for late arrivals worked well. We had one mobile workshop did not return for late lunch because they would have been 30 minutes late. It may have been better to work out something different for this group – early departure, schedule modification, assignment to a different slot for a longer duration, etc.
* What improvements should be made to improve your committee’s effectiveness for future years?
* Recommend having minimum of 7 people composed of the following: Chair, co-chairs (2) and Committee members (4 to 6 people).
* We thought we communicated frequently with mobile workshop organizers, but some mobile workshop organizers overlooked some important messages. We should have send additional reminders or follow up messages.
* We have provided water bottles to all attendees and snacks for selected mobile workshops, which had a long duration or involved long walking/biking. We distributed about 400 water bottles for 379 attendees. We offered 2 bottles per person for all day mobile workshop attendees.

### Other General Observations

* The committee worked with the following:
  + Publicity Committee: Advertise call for mobile workshops and advertise the conference, including mobile workshops
  + Program Committee: Make sure speakers are moderators are not double booked.
  + Volunteer Committee: Get volunteers to assist various tasks (checking in attendees, distribute snacks and water bottles, loading/unloading bikes)
  + Fundraising Committee: Make sure mobile workshop sponsors are recognized during mobile workshops.
* Was there something overlooked?
  + Restroom break locations during mobile workshops should have been identified.
  + Portable microphones were helpful. We should encourage use of portable microphones if they have access to one or cost is reasonable.

## Planner’s Guide Committee

This committee was comprised of 14 people. The committee was in charge of preparing the planner’s guide (both print and online). We had about 20 other contributors who also provided photos and content. KTGY provided the maps included in the guide. Dorina Blythe was the graphic designer.

### Goals

* The objective was to provide a guide to Oakland and the Bay Area (Northern Section regional areas) that would be user friendly and informative. This would be a local guide for planners by planners showcasing the best of Oakland. We wanted to provide information that would be useful for conference attendees for practical tourism purposes (nearby places to eat, drink, and visit), but with a planner’s twist. Demographics and other local and historical tidbits that would be of interest to planners were included.
* The committee reviewed previous guides from both national and state APA conferences. We discussed what we liked and did not like from the previous guides. We wanted to improve upon the ideas we did like. The goal was to provide a national conference caliber guide. We hope that we have now set the bar higher for state level conferences.

### Major Activities

* The committee wanted to provide information on the neighborhoods closest to the convention center that attendees were most likely to visit. Other key Oakland neighborhoods were also profiled, most just a short transit trip away.
* A matrix was developed listing the major neighborhoods and highlights of each.
* Committee members selected neighborhoods to profile. Generally the author of each profile also provided photos. The regional area coordinators also provided information on their areas. Each profile included a description, area highlights, demographics, and directions.
* Drafts of the profiles for Oakland neighborhoods and neighboring cities were developed and posted on the section website for information and review. A gmail account was created to receive comments, but we did not get as much web traffic as expected. It was not obvious to click on the google map pins for more information on each neighborhood. Listing of the neighborhoods underneath the map was helpful. We did receive some more feedback after the list was added.
* Moving from the online version to print involved including additional detailed listings. For the area highlights, hyperlinks only were included on the section website. The print version would include addresses, phone numbers, and weblinks.
* The committee developed the table of contents for the guide. The guide would include introduction pages, Oakland highlights, 19 Oakland neighborhoods, 5 neighboring cities, and 7 section regional areas. A 48 page 5.5x8.5 booklet was initially anticipated. The final product was 60 pages. Additional pages were added to accommodate larger, more legible maps and detailed listings.
* After neighborhood content was mostly complete, the committee developed and coordinated with the graphic designer to finalize a standard page template. The graphic designer then populated the template with our content and photos.
* Committee members selected themes to highlight (food, drink, architecture, green space, etc.). These blurbs were used for the Oakland highlights pages of the guide.
* Demographic data from the 2010 Census were compiled for the neighborhoods, neighboring cities, and regional areas. Population, ethnic markup, and median age were included.
* KTGY developed the 15 neighborhood maps and 2 regional maps included in the guide. The committee coordinated with KTGY regarding map colors, styles, information to be included, and edits.
* It was decided to map the top 10 places in each neighborhood. The committee coordinated with KTGY to finalize these listings. Having a matrix of maps and comments was a helpful approach to organize comments and questions on each map. Creating a system for numbering highlights on maps early on helped streamline the process. We decided to number highlights and list details based on proximity to transit or the convention center or a likely walking path in each neighborhood.
* Our committee met at the CHC meetings and reported on progress. We also held over 20 meetings outside of the CHC meetings. The committee met about once a month, which was about right. The meetings ramped up closer to the conference when we had proofs to review. The committee reviewed the proofs page by page during these last meetings. Meeting notes were posted to the google drive.

### What Worked

* Our committee did have an early start. We tried to assign sections among the committee and seek out other possible contributors as early as possible. The regional area coordinators were also approached to provide content and photos regarding their areas.
* We were fortunate that KTGY was able to provide mapping services. It is best to determine status of mapping resources early. Getting City of Oakland GIS information was a key component to creating the maps. We were lucky the City had that information available.
* KTGY utilized Google Earth to create data points to insert into GIS software to create maps. The method worked quite well, but did require double and sometimes triple checking to make sure the locations were in the right place. Allow some extra time for that.
* We were also fortunate to have a graphic designer. Dorina was brought on board about 8 months before the conference. Ideally this can be done earlier.
* Google drive was used as a repository for our content, photos, and maps. This was also a good way to provide all our content to the graphic designer.
* It is best to have almost all the text and photos ready a few months before the conference. A mockup of the entire guide was useful. It was easier to review and check for consistency items with the entire document versus by individual pages. It is recommended to have this done as early as possible.

### Lessons Learned

* Determine content, photo, and mapping needs as early as possible. For some items, we were scrambling a bit closer to the conference.
* Determine and work with the constraints of the guide template as soon as possible. We had a lot of editing to do to condense or add content to fit into certain pages and the overall guide.
* The online version was released a few days before the conference. Ideally it can be released earlier to help folks who arrive at the conference site early.
* The high resolution version of the guide was 48 megs. There was concern of loss of quality with the reduction in size for web and mobile use. The online version ending up being 38 megs to maintain the integrity of the maps, however, this may be too large for easy mobile use.
* The graphic designer worked on preparing the guide for online use. There were issues with activating hyperlinks. They did not all work on certain mobile devices. More information should be available from Adobe. More time was needed to prepare the online version than was expected. More time should be allocated overall to transfer the print version to online.
* Editing was a challenge as the graphic designer was the holder of the document. Consider the possibility of the committee holding the master copy of the document. Changes at the end were more frequent and not as consolidated. Double checking of edits was needed.
* The graphic designer handled coordination with the printer. About 2.5 weeks were allowed after the final proof was approved for printing prep, printing itself, and shipping to the conference. The final professional product arrived a day before the conference.
* 1500 copies were printed. Registration numbers ended up being around 1900. Potentially a larger buffer is needed for more copies. However, in the future, attendees may have more of a preference for an online or mobile version.
* Generally the committee should try to address items as early as possible to avoid too much scrambling too close to the conference.

### Other General Observations

* If the committee ever wants to prioritize the digital version of the guide in the future (save the trees!), this has to be worked out well in advance since it is not easy to just port the paper copy over to the conference app, or to use a pdf version (large file size, small screen). Funding (for an app developer) and a separate development process (separate committee? subcommittee?) should be identified at the very start of the process.
* The committee should be realistic about how far planners are going to venture from the conference site.  The guide should really pump up the content for places within a 5 block radius, even if they are just “meh” places.  We took a more global perspective and focused on “cool” or “wow” places around the city.  Future committees should consider including a listing of more practical nearby places, even if they are not the most exciting (nearest coffee shop, bagel shop, Subway, etc.).
* Budget for the planner’s guide (printing and graphic design support) was allocated relatively later in the process. This should be determined earlier. Also, the planner’s guide should be listed as a sponsorship item early in the process. The fundraising committee did secure a planner’s guide sponsor.
* We worked with the merchandising committee to help with a mini guide to be provided at the Anaheim conference to promote the Oakland conference. This effort was ultimately abandoned as possible giveaway items appeared to overlap (bookmarks).

## Publicity

The publicity committee’s charge was to inform and solicit interest in the 2015 conference. The publicity committee was made up of eight members with various skills and abilities. The committee was responsible for a number of duties, including website content, “MyOakland” articles, and social media.

### Goals

* Publicize a positive image of Oakland
* Inform potential attendees about key dates and information about the conference
* Have an impactful social media presence
* Ensure a consistent tone and message for all conference content
* All goals were met.

### Major Activities

* MyOakland Articles
* Publicizing positive articles about Oakland
* Coordination with Northern News, eNews, and Cal Planner publications
* Coordination with other local sections’ media outlets
* Press Releases
* Social Media: Twitter, Instagram, LinkedIn, Facebook
* 2014 conference booth
* Logo Competition
* Website Content
* Mobile app content
* Coordination with Fundraising/sponsorship
* Review conference content for consistency and messaging
* Publicity Committee met approximately every other month.

### What Worked

* Most activities were very successful.
* Having a dedicated social media person was helpful.
* Oakland publications and MyOakland articles were extremely population and received positive reviews.
* The logo competition was very successful, garnered interest in the conference and resulted in a powerful and beloved logo.

### Lessons Learned

* Coordination with other sections was useful, but we should have started that earlier with better coordination and issuing of information. Perhaps regular press releases sent to all the California sections would have been useful.
* Having a dedicated social media person was very useful and we should have identified one earlier in the process.

### Other General Observations

* With what other committees did you work?
* Was there something overlooked?

## Volunteers/Student Day

The Volunteers/Student Day committee was comprised of 10 members, including a CHC Co-Chair and the Chair of the committee. The committee was in charge of recruiting and managing student and recent graduates as volunteers for the four days of the conference. In addition, the committee organized two events for Student Day. Because of the focus on students, several members of the committee were APA student representatives.

### Goals

* Goals set prior to the conference included:
  + Recruit students and recent graduates as volunteers
    - Recruitment started in spring of 2015.
    - Approximately 90 students, recent graduates, or young planners responded to the Call for Volunteers.
  + Obtain lists of volunteer tasks, times, and instructions from other committees, CPF Auction, and conference management; prepare sign-up sheet.
    - Lists were provided two weeks prior to the conference after directly asking for a form to be completed.
    - Sign-up sheet went to potential volunteers about 1.5 weeks before conference.
  + Organize Student Day Activities
    - Student/APA meet & greet was planned.
    - Student Poster Competition was launched and planned.

### Major Activities

* Volunteers
  + Recruit Volunteers
    - Create Call for Volunteers flyer
    - Discuss volunteer opportunities with APA student reps
    - Strategize with committee members and CHC Co-Chair on volunteer benefits.
  + Organize Volunteer Time Slots
    - Request lists of tasks, instructions, and times volunteers were needed from other committees.
    - Prepare and launch sign-up form (we used SignUpGenius)
    - Launch sign-up form and track time slots
  + Manage Volunteers During Conference
    - Check volunteers in
    - Provide instructions & volunteer locations
    - Ensure key tasks were covered during most of the conference: registration, swag table, sessions (especially AV support), CPF Auction, luncheons (check badges)
  + Tally Volunteer Hours for Student/Recent Graduate refund benefit
* T-Shirts – Volunteers & CHC Members; distribute
  + In conjunction with Merchandising committee
* Student Day
  + Student/APA Meet & Greet
    - Recruit APA members/Professional Planners
    - Arrange for location of meet & greet, coffee, breakfast
    - Prepare “bingo” game for students to interact
    - Procure small rewards for students who complete “bingo” card
  + Student Poster Competition
    - Prepare flyer to send to universities, APA student reps, etc.
      * Decide rules and process for submitting poster ideas
      * Design flyer
    - Decide on prize
    - Review student poster ideas submitted and choose posters for competition
    - Organize location and logistics of competition
    - Promote voting by conference attendees, tally votes, announce winner(s)
* The committee met by phone three or four times outside of the CHC meetings in the months leading up to the conference.

### What Worked

* Student poster competition
  + There were more entrants than we expected because of strong promotion by APA student reps and committee members.
  + It was held at the Opening Reception where conference attendees could easily see the posters.
  + Students were on hand to show and explain their work.
* Student/APA Meet & Greet
  + Held during the lull between student conference registration and the first student session block.
  + Students were able to network with professional planners and hear not only about the APA and its chapters and benefits, but about the planning profession.
* Volunteer recruitment
  + One of our committee members spoke to a class at her alma mater about the conference after which many students wrote to express interest in volunteering.
  + Outreach by professional planners to interns, former professors, and others seemed to spur interest in volunteering.
  + Social media – each post on the APA California Facebook page, the release of Northern E-News, and each post on LinkedIn led to a blast of interest in volunteering
* Volunteer Slots on Saturday and Sunday of the Conference
  + Students were generally available on these days

### Lessons Learned

* Recruit or assign more people from the CHC meetings to be on the committee
  + Although 10 people were officially on the committee, only one or two were involved in managing volunteers *during* the conference. It would have been better to have at least 3 people available to sit at the volunteer check-in/t-shirt table, to check in on volunteers, and to provide a break to others on the committee working on volunteer management.
* Recruit volunteers from a larger pool than students and recent graduates
  + Students were available on Saturday and Sunday of the conference, but generally not on Monday or Tuesday. By Tuesday, there were only a handful of people available to cover volunteer tasks.
* Instead of asking potential volunteers to send an email to the committee chair, create and post a “volunteer opportunity request” form for volunteers to complete which requests specific information up front, such as t-shirt size, if they are a student or recent graduate (and graduation date), contact information, whether they can help with AV/tech issues, and general availability.
* A monetary benefit is enticing, but may not be the best way to retain volunteers.
  + Of the approximately 90 initially interested volunteers, only approximately 60 signed up for volunteer slots, and 15 met the requirements for the $50 refund offered to students & recent graduates for 8 hours of volunteer time.
  + Consider other methods of providing compensation if a monetary benefit is the best choice, for example, a low hourly benefit.
* Be more direct in asking other committee chairs for their volunteer needs – provide a form for them to complete, and ask for it one month in advance.
* Be prepared for volunteers to drop out; go with the flow, someone will usually step in if and when needed.
* If t-shirt sizes are obtained before shirts are ordered, make sure the sign-up form is easy to read and names are easy to find and check-off; ask the Hospitality chair to provide the sign-up form prior to the first day of the conference.
* SignUpGenius is free, but you get what you pay for. There might be other options.

### Other General Observations

* The Volunteers role of this committee worked most frequently with Publicity and Merchandising before the conference. During the conference, the main committees we worked with were Hospitality, Sessions, and Mobile Workshops to provide volunteer. We also worked with the CPF for their Auction and the conference manager during the conference for registration.
* I would like to say that the Volunteers chair is the busiest person of the CHC during the conference, but the co-chairs were likely just as busy. Still, be ready for long days!
* Generally, start everything about a month earlier than is thought necessary.
* Try to attend at least a couple of speaker sessions and have fun!

**Programs Committee**

The Programs Committee was comprised of 35 people (roughly, 6 people were recruited to review submittals in each of the 6 core conference tracks) plus 1 chair. The committee was in charge of reviewing, selecting, and scheduling the presentations to ensure successful program content for each session block of the conference.

## Goals

* Ensure a wide variety of successful program content in each of the tracks including, local and statewide planning topics and issues, and selecting a large number of presentations that would potentially qualify for required professional development certification maintenance (CM) credits, for each of the session blocks scheduled over the course of the 4-day conference.
  + The goal was met. A total of 127 presentations (including sessions, salons, and workshop/design charrettes) were selected and scheduled during the conference’s 10 regular session blocks (plus 1 presentation that was scheduled for the Monday Plenary Luncheon and 1 presentation that was scheduled for the Saturday Diversity Summit); 6 presentations were selected and scheduled during conference’s 2 student session blocks; and 2 Saturday Pre-Conference Sessions that were coordinated by the Chapter Board. Of these 137 total above-listed presentations, 131 were approved to receive AICP CM Credits.
* Ensure successful Student Poster Competition during the Opening Reception.
* The goal was met. A separate subcommittee including the Programs Chair was formed to organize, pre-screen, and facilitate a Planning Student Poster Competition during the Conference’s Opening Reception. 6 of the 7 total student poster entries were selected to exhibit at the Opening Reception, and 3 CPF board members sponsored the ticket costs for all students associated with these posters, so they could attend the Opening Reception, present their posters to attendees, and garner votes. Student Poster entries were received from a total of 4 schools: Cal Poly San Luis Obispo, University of Southern California, San Jose State University, and UC Berkeley. Two award winners were selected by reception attendees who voted on the posters by dropping their written votes into various ballot boxes located at the bar/drink stations. A 1st place winner who was awarded a blue ribbon and a $100 cash prize, and a 2nd place winner who was awarded a red ribbon and a $50 cash prize. All 10 of the students that were selected to exhibit the 6 posters (a few of the entries consisted of small teams) at the Opening Reception received a complimentary ticket for the reception itself (valued at $30).

## Major Activities

* Brainstormed and selected 6 core conference tracks that related to the overall conference theme of “Rooted in AuthentiCITY”, and identified lists of possible planning presentation topics anticipated to be submitted within each of the following core tracks (see Attachment 1):
* Track 1: Roots and Foundations
* Track 2: Rings and Form
* Track 3: Branches and Specializations
* Track 4: Green Canopy
* Track 5: Harvest and Diversity
* Track 6: Beyond Forests – Innovation Frontier
* Once the 6 tracks were selected by overall CHC, the Programs Chair recruited 35 planners (approximately, 6 people were recruited) to review submittals in each of the 6 identified core conference tracks. Committee members were asked to indicate their top-3 track choices for submittals they would like to review, and then the Programs chair assigned them their first (Mostly) or second choice and selected a track leader to manage the track sub-committees, and to collect and organize the committee’s evaluation forms.
* Worked with chapter staff, chapter board members, conference co-chairs, and the Programs Committee to prepare and advertise a Call for Presentations flyer (see Attachment 2) and finalize the chapter’s new online presentation submittal/notification process.
* Developed Presentation Review Guidelines and a Presentation Scoring Form to review, score, rank, and selected the final presentation submittals to in each track (see Attachment 3).
* Evaluate and suggest presentations submitted that should be combined based on similarity of topic/issue and available capacity to combine panels.
* Worked with Laura Murphy to notify moderators via the new online submittal program for which presentations were selected, not selected, and responded to a huge number of presentation-related email inquiries.
* Scheduled a total of 133 presentations in each of the 12 total conference session blocks (10 regular session blocks plus 2 student session blocks) by carefully taking into account the following key factors:
  + Ensured presentations with AICP CM Ethics credits were scheduled on each day of the conference.
  + Ensured presentations with AICP CM Law credits were scheduled in each of the 10 regular session blocks.
  + Ensured that presentations from each of the 6 conference tracks were scheduled in each session block (to minimize “sophie’s choice” type decisions for conference attendees attempting to attend as many presentations in one particular track as possible).
  + Tracked and ensured presenters speaking in multiple presentations were not “double-booked” in conflicting scheduled presentations (see Attachment 4)
  + Ensured presenters speaking in Mobile Workshops were not “double-booked” with conflicting scheduled conference presentations.
  + Ensured that each of the 10 regular session blocks contained sessions, salons, and workshop/design charrette type presentations.
  + Ensured special schedule requests from Chapter “By-Right” presenters/board members, and several presentation moderators that proactively contacted me were accommodated.
  + Ensured that a wide range of presentation topics were scheduled in each session block (in other words, tried not to schedule similar presentation topics or issues in the same session block).
  + Pre-identified with the Committee which presentations would likely need small, medium, large, or extra-large presentation rooms, and then ensured that each presentation in each session block was scheduled accordingly per the available hotel room sizes while taking into account all of the above other factors.
* Worked closely with Laura Murphy, Betsy McCullough, all 3 conference Co-Chairs, Francine Farrell, Dorina Blythe, and Angie Spearman in finalizing many various presentation-related logistics, the various iterations of the Conference-At-A-Glance, Conference Program, room set-up and room capacities, final presentation room assignments, etc.
* Coordinated with Betsy McCullough and Terry Blount on scheduling the 2 Saturday Pre-Conference Sessions, as well as the various presentations that were to be recorded for Distance Education purposes (see Attachment 5).
* Worked closely with the Northern Section’s Student Representative Mariaclara Zazzaro to organize, advertise, and facilitate a Planning Student Poster Competition (see Attachment 6) during the conference’s Opening Reception.
* During the conference itself, volunteers and committee members assisted with checking in on each presentation prior to its commencement to ensure presenters showed-up, that PowerPoint slideshows and projectors were functioning, and overall, to address any last minute “technical glitch” type problems presenters might have. After the initial check-ins were conducted, volunteers and committee members conducted surveys of each of the presentation rooms to visually evaluate room capacity for attendance (see Attachment 7).
* 4 – 6 in person meetings before or after the Saturday CHC Meetings held in Oakland.
* At least 8 committee conference calls (1 with each of the 6 core conference track subcommittee members, and a few additional calls with some of the track subcommittees and the student poster competition subcommittee).

## What Worked

* Having a great group of dedicated Committee members willing to review and evaluate large number of presentations that were submitted in each of the tracks they were assigned (only one person dropped of the committee once they realized the large the volume of submittals that were received) was amazing.
* Having track committees that consisted of both seasoned planners and new professionals to balance the overall evaluation scores (particularly for the less-exciting yet necessary “nuts and bolts” type presentations, and for the new and emerging technology-related presentations) was key.
* Having a track leader that the Programs Chair could rely on that would ensure programs advertising deadlines could be met was critical.
* Empowering track subcommittees to select only the absolute “cream of the crop” presentations, and to help identify related presentation submittals that could potentially be combined together to be able to actually select many submittals that resulted in making up the final 133 total conference presentations was also critical.
* Over 300 presentation submittals were received and evaluated. Originally, to be able to only select approximately 85 presentations total (because approximately 15 “By Right” presentations were already somewhat pre-selected) to have a total of approximately 100 presentations, which were to be comprised of submittals in all 6 tracks, was extremely difficult! The Co-Chairs and Chapter’s decision to go back and negotiate with the hotel to add additional conference presentation rooms, which then allowed for a total of 133 presentations was tremendously helpful and we believe contributed greatly to the success of the conference.

## Lessons Learned

* Ensure Committee members and track leaders are available to take-on a larger programs-related role beyond just reviewing, scoring, and selecting the presentations submitted in the particular core conference track they are assigned to review. They could have helped by perhaps being the track point of contact for moderators from presentations in a particular track (versus all emails and inquiries having to go to the Programs Chair); and a few more Committee members volunteering during the conference itself would have been helpful with the initial check-ins and room capacity surveying of the 133 total presentations.
* We communicated by email in a timely manner and as necessary with presentation moderators, but a number of moderators simply did not read important email messages (e.g., I can’t tell you how many times I responded to inquires where I reiterated, “yes, you must bring your own laptop since we will not provide a laptop for you at the conference” even though that message was prominently included in multiple emails to the moderators).
* Student volunteers were mostly available on Saturday and Sunday only, and their availability was extremely limited on the regular weekdays of the conference. We had to supplement volunteers needed with Programs Committee members and other last minute volunteers on Monday and Tuesday. If we would have known this in advance, we would have coordinated early-on with the Volunteers Chair to secure more non-student volunteers for the weekdays of the conference.
* Most of the “technical glitches” associated with PowerPoint presentations during the conference had to do with presenters using Apple-brand laptops who did not bring an appropriate adaptor to connect their laptops to the (PC-ready) projector cables. Plan to purchase and have available (or ensure that the hotel AV/IT team contracted to address AV needs during the conference has) at least 8-10 adaptors to run to different presentations rooms, as needed. This issue maybe something to highlight in an email to the moderators prior to the conference, in terms of which type of adaptor to bring to be able to easily connect the projector cables to their Mac laptops.
* Review early-on the roles, responsibilities, and advertising schedules with other Conference Committees, Chapter board, and the local Section board (i.e., eNews, Northern News publication schedule, deadlines for finalizing conference schedule, etc.).
* Room size selection was estimated as well as could be done in advance of the conference by taking into account presentation topic, speakers associated with the presentation, and if additional CM Ethics or CM Law Credits were being sought. What was not anticipated was a much larger number of conference attendees, so a number of the rooms associated with “popular” presentations (per the criteria above) were full beyond capacity and overflowing into the hallway. In addition, contractually and what was physically available for us to use at this hotel included (1) a few small rooms, (2) a lot of medium size rooms, (3) a few large rooms, and (4) few extra-large rooms. Given the much larger attendance than what was planned for, would have been better served to have had more large rooms and fewer medium size rooms.
* Even though we indicated in advance to the moderators that sessions and salons would be set-up with chairs in “theater style” rows, and only the workshops/design charrettes would be set up with rounds tables and chairs, the theater-style chairs/room set-up proved to be a problem for at least one presentation. This particular session organizer changed the chairs from theater rows to be in one big round circle, and then rudely left the room that way when they finished their presentation (instead of putting the chairs back into theater rows). This change cause a bit of a problem for the next session when they found their room set up had been completely messed up, but with the quick help of a couple volunteers, we were able to reorganize all the chairs in the room back into an order that they needed. Asking all moderators in advance to confirm that they either need theater row seating set-up, or banquet-style tables and chairs set-up in the room, and then asking them not to change the room set-up (unless they are willing to return the chairs back to the way they found them) could be helpful.
* Inevitably, presentation submitters always wait to the very last minute to submit their presentation proposals. We had a record number of submittals this year (well over 300), and we had a new online presentation submittal process to contend with. Plan for the website to crash briefly on the day of the submittal deadline (make sure web support staff are available like we had on the actual day of the deadline), put a plan in place to anticipate a handful of proposers who will be affected by technical glitches and/or who were unfamiliar with the new online presentation submittal process (e.g. plan to extend the deadline to allow everyone who tried to submit but couldn’t due to the crash or whatever technical glitch to submit, and/or plan to accept a small number of “late” submittals if they are complete or fully developed).
* Planners require A LOT of “hand holding” and seemingly, don’t read emails! Be prepared for many, many email inquiries requesting programs-related information that has already been provided. While no one went unanswered, a Programs Co-chair to help address these many inquiries would have been helpful. As it was, God-send Laura Murphy in essence served in a Co-Chair capacity in spite of her many other official conference responsibilities (THANK YOU AGAIN, LAURA MURPHY!!!).
* Having the student posters exhibited on easels at the outdoor Opening Reception proved to be problematic due to high winds. Lighting was also challenging.
* Given the heavy workload, responsibilities, and coordination associated with the Programs Committee, I recommend having a minimum of 2 people to serve as Co-Chairs for this committee, and 4-6 people per core conference track to serve as the Committee members.
* Strive to keep email content as short as possible and when in doubt, repeat important day-of presentation moderator/panelist instructions. Some feedback we got was that our emails were too long. Also, some moderators failed to pass along important information to their panelists because they expected us to email each person associated with their presentation (even though we told them they would be the point of contact and they would be required to coordinate and share all information with their panelists).
* We only had one last minute presentation cancellation out of the 133 total presentations coordinated, but plan for some small number of cancellations. Possibly, consider having at least one presentation moderator and their panelists available on “stand-by” who might be willing to present with very short notice.
* For future student poster competitions, we would recommend that the posters be exhibited indoors, or in an enclosed area; and better choreographing the award of the 1st and 2nd place prize winners (even with a microphone, it was hard to communicate in such a large space outdoor space with so little lighting). Lastly, handing out “I Voted” stickers at the reception might be a fun way to help get the word out about the student poster competition and encourage other reception attendees to participate in voting.

## Other General Observations

* Publicity Committee: Advertise the Call for Presentations, Call for Student Posters, and overall, advertise the conference (6 distinct conference tracks, 3 presentation formats, etc.).
* Mobile Workshops Committee: Make sure speakers and moderators are not double-booked.
* Diversity Committee: Review and selection of the diversity-focused presentations for the “Harvest and Diversity” Track, as well on the presentation for the Saturday Diversity Summit.
* Volunteer Committee: Get volunteers to assist various tasks (initial presentation check in to address presenter technical glitches, no-shows, and conduct room visual surveys for capacity).
* Fundraising Committee: Made sure final list of selected presentations was provided to the Fundraising Committee for them to target likely sponsors who were selected to present. Programs Chair and Committee assisted with some of the initial fundraising outreach.
* Hospitality Committee: Coordinated and facilitated the Student Poster Competition during the Opening Reception with the Hospitality Chair and committee members.
* Also worked closely with the 3 Conference Co-Chairs, the Chapter’s VP of Conferences, the Chapter’s VP of Professional Development, and Chapter staff.

## Programs Attachments (not distributed for January 2016 Board Report)

**Attachment 1:** 2015 APA California Conference Tracks & Planning Related Topics.

**Attachment 2:** Call for Presentations Flyer.

**Attachment 3:** Sample Presentation Evaluation Scoring Form.

**Attachment 4:** 2015 APA Conference Presenters.

**Attachment 5:** Sample Permission to Tape and Permission to Use PowerPoint Presentation in Distance Education Forms

**Attachment 6:** Student Poster Competition Flyer.

**Attachment 7:** 2015 APA California Conference Presentation Room Visual Surveys (Part A includes surveys from Student Session Blocks 1 and 2, plus Session Blocks 1-5; and Part B includes surveys from Session Blocks 6-10).