

# **M NATHIST**

ICOM  
international committee  
for museums and collections  
of natural history

## **CONFERENCE PLANNING GUIDE**



# 2018



# Preface

Since the 1960s, the International Council of Museums Committee for Museums and Collections of Natural History (NATHIST) has held an international meeting for its members, often joined by members and guests from host institutions.

Hosting a conference is an important opportunity. The hundreds of details that are considered to make a conference successful for the attendees are often unseen by others. For an historical overview of NATHIST Annual Conferences, consult the NATHIST website. <https://icomnathist.wordpress.com/archive/> Past conference information is being archived and uploaded on an ongoing basis.

This guide is intended for member intuitions who are hosting a conference to provide detail on most activities associated with the conference, or who are interesting in being considered as a venue and wish to know what is involved.

The Board of NATHIST is committed to making its conferences as straightforward, valuable and enjoyable as possible for both the organizers and delegates. We are extremely happy to assist with additional information on any aspect of this manual.

## Note to the 2018 Edition

The Board of ICOM NATHIST have changed the title of this publication from “handbook” to “guide,” consistent with the idea that the document is a support to achieve the most out of the conference, rather than represent absolute requirements.

Dr. Eric Dorfman  
President, ICOM NATHIST  
December 2017

## Contents

Preface .....	2
Section One: Guide at a Glance .....	6
1. Planning Timeline.....	8
36 to 24 months before the conference.....	8
24 to 18 months before the conference.....	8
18 to 12 months before the conference.....	8
12 months before the conference .....	9
11 months before the conference .....	9
9 months before the conference .....	9
6 months before the conference .....	9
2-10 days before the conference.....	9
At the conference .....	10
30 days after the conference .....	10
December 1 after the conference.....	10
2. Key Parties Involved in the process .....	10
Conference Host .....	10
3. The Annual NATHIST Conference Location .....	12
Site and Venue Selection Process .....	12
Benefits of Hosting the Annual Conference.....	13
4. Selecting and Organizing the Conference Planning Team .....	13
Introduction .....	13
Conference Theme.....	14
Balancing conference activities.....	14
On-Site Conference Chair Considerations .....	14
Pre-conference meeting .....	15
During the conference .....	15
Immediately following the conference .....	15
5. Program.....	15
Typical conference schedule.....	15
DAY ZERO (pre-conference) .....	16
DAY ONE.....	16
DAY TWO.....	16
DAY THREE .....	16
DAY FOUR.....	16

DAY FIVE onward .....	16
Program Committee responsibilities .....	17
Selection of Keynote Speakers.....	17
Public events and those with outside organizations .....	18
Receptions and special events .....	18
Working group meetings .....	18
NATHIST Board meeting.....	19
Pre-conference party .....	19
Opening reception .....	19
Public lecture(s) .....	19
Grand opening of the exhibit hall .....	19
Cultural heritage event .....	19
Award recipients' event.....	19
ICOM NATHIST Annual General Meeting.....	19
Other receptions .....	20
resident's Breakfast .....	20
6. Finance and Delegate Services.....	20
Conference Treasurer .....	20
ICOM NATHIST Treasurer.....	20
Conference Management and Finances .....	21
Conference budget review and approval .....	21
Major Income Sources .....	21
Registration.....	21
Exhibitor fees .....	21
Gifts, donations, sponsorships, and fund-raising.....	22
Merchandising .....	22
Receptions and Special Events.....	22
Major expenses.....	22
Speakers and Keynote Sessions .....	22
Facilities.....	22
Printing.....	22
Postage.....	22
Food and Beverage Functions.....	23

Equipment Rental .....	23
Conference bag and contents .....	23
Transportation .....	23
Provision of Services for Attendees with Disabilities or Dietary Concerns.....	23
Conference fee waivers .....	23
Student bursaries and other awards .....	24
Financial reports .....	24
7. Registration Policies .....	24
8. Entertainment .....	24
9. Attendee-related Issues .....	25
Registration .....	25
Call to conference .....	25
Registration Form .....	26
Conference Program .....	26
The Conference Bag and What's Inside .....	27
10. Hospitality .....	28
Hospitality Table .....	28
Types of materials at the hospitality table .....	28
Food-Related Accommodations.....	29
11. Exhibitors .....	29
Exhibit Areas and Fees .....	30
Invitations to Exhibitors .....	30
Hospitality to Exhibitors.....	30
Providing Exhibitors with Maximum Exposure .....	30
Special Vendors.....	31
12. Promotion and Publicity.....	31
Marketing the Conference.....	31
Keeping a Visual Record of the Conference.....	32
13. Programming for Conference Companions .....	32
14. Final Conference Report .....	33
Appendix: Amendments for a General Assembly .....	33

# Section One: Guide at a Glance

## 1. Planning Timeline

This section lays out the ideal timeline for NATHIST conferences, to account for unforeseen circumstances. In reality, there is flexibility and the timing of events is negotiated on a case-by-case basis.

## 2. Key Parties Involved in the process

## 3. The Annual NATHIST Conference Location

This section sets out process for choosing between venues, when more than one country bids for it in a particular year, as well as what you should think about regarding your venue and infrastructure when considering hosting a conference.

## 4. Selecting and Organizing the Conference Planning Team

In this section, you will see who is involved, or potentially involved, in the planning team. Some roles can either be taken on by the host time or NATHIST Board members, depending on the circumstances.

## 5. Program

Aspects of programming, like speakers, session themes, concurrent sessions and workshops, as well as associated events are covered in this section. While most of these discussion points are in the complete control of the host, a number of them must be approved by the NATHIST board.

## 6. Finance and Delegate Services

This section covers financial considerations, budgeting and what is generally expected, both from ICOM and prospective delegates. It covers handling money and discusses options for processing international payments. The section also covers various potential sources of income, including revenue and sponsorship.

## 7. Registration Policies

Because of the potential financial and legal risks to the host venue and to NATHIST, the Board has created some rules around registration and taking money. They are detailed in this section.

## 8. Entertainment

One of the best reasons to host a NATHIST conference is to promote your institution. The mark of an effective conference is one that provides an opportunity for delegates to engage with your museum and region. This section provides ideas for local entertainment in the form of tours, cultural opportunities and food.

## **9. Attendee-related Issues**

From forms to conference bags and gifts, this section provides a resource for administration of the conference.

## **10. Hospitality**

In this section, we cover the details of catering and other considerations, as well as providing for guests with special needs.

## **11. Exhibitors**

This section covers ideas for a trade fair during the NATHIST conference, which is useful if the conference is large enough to warrant it. It also covers expectations and requirements from NATHIST and other useful resources.

## **12. Promotion and Publicity**

The promotion section lays out marketing activities before and during the conference, including graphic look and feel, and providing a vision record of the event for use by NATHIST in post-conference promotion. Although the graphic identity is up to the conference organizer, some design standards apply.

## **13. Programming for Conference Companions**

This section provides advice for those bringing spouses, partners and other guests on the trip, but not necessarily attending the sessions.

## **14. Final Conference Report**

At the end of the conference (within three months) the NATHIST Board would like a report, detailing the attendees, speaker highlights and images. These will be used for reporting to the ICOM Secretariat and for communication to members. This section gives information to help you with reporting.

## **Appendix: Amendments for a General Assembly**

This section provides an overview of the differences between a normal annual conference year and a triennial general assembly.



# 1. Planning Timeline

Keeping pace with the conference planning time line is critical. Once a host's internal planning team is behind, it is difficult to catch up, especially during the final six months before the conference. Following is a brief planning review, with projected time lines:

## **36 to 24 months before the conference**

- A NATHIST member in good standing decides to apply to host the annual conference and, in consultation with the NATHIST Board, prepares materials to be submitted.
- The NATHIST President evaluates the proposal and recommends the host applications to the NATHIST Board. In the event that more than one country sends invitations for the same year, this will be negotiated by the NATHIST Board.
- The host representatives may be invited to make a presentation to the Board.
- The ICOM NATHIST Board confirms the choice of venue. This may happen at a Board meeting or by email.

## **24 to 18 months before the conference**

- The Conference Host forms a Conference Planning Team that liaises the ICOM NATHIST Executive Board the suggested host cities and potential hotels.
- The Conference Planning Team begins to review the ICOM NATHIST Annual Conference Planning Manual.
- In communication with the ICOM NATHIST President, the Conference Planning Team begins recruiting people for conference committee assignments and establishes key conference roles such as Chair or Co-Chairs, Conference Treasurer, etc.

## **18 to 12 months before the conference**

- Select of keynote speakers.
- Development of conference promotional materials.
- Consider fee-based events such as tours, receptions, and dinners that may be offered in conjunction with the conference.
- Submit preliminary conference budget to the NATHIST Executive Board. (See Appendix F - Conference Budget Template)
- Receive NATHIST Executive Board approval of conference theme, logo, keynote speakers, and preliminary budget.
- If necessary, request the NATHIST Treasurer to establish an account from which to pay for expenses as they arise.
- Create, seek NATHIST Executive Board approval, and print applications and forms (e.g., Conference Volunteer Form, Exhibitor Order Form, Call for Concurrent Session Proposals, Call for Pre-/Post-Conference Institutes, Poster Session Proposal Form).
- Create, seek NATHIST Executive Board approval, and print promotional materials (e.g., conference promotion flyer, posters, promotional gifts)
- Develop a conference page on the NATHIST website that includes the appropriate forms as listed above, city information, pre-registration information, etc., to be launched at the end of the previous year's conference. Alternatively, create a stand-alone website to service the conference (this is the responsibility of the host).

## **12 months before the conference**

- Send applications and forms such as:
  - Call for Concurrent Session Proposals
  - Call for Pre-/Post Conference Institutes, Poster Session Proposal
  - Exhibitor Commercial Strand Session
  - Exhibitor Order Form (if applicable)
  - Information about the following annual NATHIST conference to be included in conference bags
- Begin to develop promotional advertisements to be submitted to reciprocal organizations, chapter newsletters, NATHIST newsletters, journals of professional organizations and ICOM News.
- If in the USA, seek sales tax exemption from the state/province where the conference will be held. (This is a significant cost that can be avoided.)
- The NATHIST President begins liaising at least once a month with the Host's Conference Planning Team.
- As practicable, members of the Conference Planning Team job shadow and volunteer at preceding year's annual conference to gain experience and ideas that can be implemented.
- Present a formal invitation at the preceding year's AGM.
- Provide the Call for Proposals to members at the conference.
- If practicable, meet with NATHIST Board, President, and Conference Manager (if one exists) at the Board meeting during the preceding year's annual conference.

## **11 months before the conference**

- Using multiple communication channels, disseminate the Call for Papers and Posters and information for Exhibitors (if applicable) so that potential attendees know that they are accessible online.

## **9 months before the conference**

- Post the final conference registration form online.

## **6 months before the conference**

- The NATHIST President, or delegate, teleconferences with the Conference Planning Team.
- Increasing amounts of conference information is posted to the conference web page on the NATHIST website.
- Give a summary of conference activities and budget to the NATHIST Executive Board.
- Marketing, if a public component is to be included.

## **2-10 days before the conference**

1. Set up staff office and work rooms.
2. Check arrival of shipments, secure storage, and organize materials.

3. Stuff attendee bags. Prior to arriving, double check that everything that is slated to be stuffed in the bag has been received. Of particular note would be exhibitor flyers or materials that were promised based on their level of involvement, NATHIST Board items, items promoting next year's conference. The Conference Chair should develop a comprehensive list of all items to be included in the bags. Materials may be requested in an electronic form if Conference Planning Teams choose to provide a USB drive for all attendees in their conference bags.
4. Create name tags.
5. Double check special meals.
6. Conduct last-minute training for registration personnel, if required.
7. Check on arrangements for special conference guests.

### **At the conference**

- The Conference Planning Team liaises with the NATHIST Board during the conference to ensure that everything is running smoothly.

### **30 days after the conference**

- Settle all bills with the hotel and other vendors.
- Make refunds to conference attendees following conference procedures.
- Post conference report, with pictures, online.

### **December 1 after the conference**

- Complete the conference final report (See Appendix N – Sample Conference Final Report) and submit to the ICOM NATHIST Board for archiving
- Planning Team, and the ICOM NATHIST President who will share the report with the Executive Board.
- Settle all bills.
- Prepare all requested budget materials to the ICOM NATHIST Treasurer for a final audit. This will be included in a final report to the ICOM Secretariat.

## **2. Key Parties Involved in the process**

### **Conference Host**

- Initially proposes their institution as a venue and negotiates internal arrangements
- Appoints a Conference Planning Team from within its staff or hires an outside conference manager
- Conference site research, contract negotiations and on-site management
- Organizes accommodation, ground transportation, conference venue, catering and other logistics
- Receives and vets conference abstracts
- Creates conference materials
- Organizes the conference schedule, with support from the ICOM NATHIST Board
- Publishes abstracts and/or proceedings at their discretion and cost

**ICOM NATHIST Elected Board Members**

- Approve Conference Host and venue
- Oversee the process of conference site selection, provide support and guidance to the Conference Planning Team
- Serve as primary liaison with conference host on behalf of the members
- Shares the hosting duties during the conference (e.g. with members and media)
- Chooses the theme of the conference, in consultation with the Conference Host
- Leads any spin-off projects such as professional publications

**ICOM NATHIST President**

- Oversees coordination of the various elements of the planning, as necessary
- Primary liaison between the ICOM NATHIST Board and the Conference Host
- Champions the conference and associated activities
- Undertakes direct marketing to promote it
- Engages in other promotional activities
- Invites keynote speakers, in partnership with the Vice President

**ICOM NATHIST Vice President**

- Oversees coordination of the content elements related to paper presentation
- Liaison between the NATHIST Board and the Conference Host related to presentations
- Receives and reviews abstracts
- Works with conference host to arrange the content into a series of talk and/or poster sessions

**ICOM NATHIST Secretary**

- Maintains and updates the membership database
- Liaison between the NATHIST Board and the Conference Host related to membership
- Works with the Treasurer and the President to plan the AGM
- Assists NATHIST Executive Board, NATHIST Vice President and Conference Planning Teams by promoting ongoing consistency in conference organization and operation
- Leverages the conference to increase membership

**ICOM NATHIST Treasurer**

- Liaison between the NATHIST Board and the Conference Host related to finances
- Works with the Conference Host on a mutually acceptable arrangement for collecting money. This changes with the legislation of individual countries and logistic requirements of the host.
- Prepares financial statements for the AGM

### 3. The Annual NATHIST Conference Location

*NB: This is the process for meetings that are NOT a part of the ICOM triennial General Assembly. See the Appendix for amendments to this process for a General Assembly.*

#### Site and Venue Selection Process

1. The NATHIST President actively recruits members to submit applications to host the annual conference. Conference sites should, if possible, be selected at least three years in advance to allow for adequate planning and facility negotiations. The NATHIST Board attempts to rotate the annual conference geographically throughout regions of the world to encourage inclusive participation. The President elicits applications through announcements made at the annual conference, printed materials, direct phone calls to institutional leaders, and other proactive strategies.
2. NATHIST Board members determine that they are interested in hosting the annual conference. It is not necessary for a representative from the NATHIST Board to visit the site beforehand.
3. Discussions with the NATHIST President. Preliminary discussions include a review of the role responsibilities of the host, including the stipulation that they must be (or represent) NATHIST members in good standing. The host should provide the following information:
  - a. A letter of commitment to the Executive Board that describes resources available, e.g. volunteers, potential conference team leaders, financial support.
  - b. Review of any unique or special options for the conference
  - c. Support that can be provided by institutions, agencies, etc.
  - d. A list of appropriate/preferred venues, trip locations and accommodation options
  - e. Information, if applicable, from state or local tourism body describing events and activities available for conference participants, along with potential partnerships and incentives
  - f. If appropriate, information about sponsors and funding sources which NATHIST could support on behalf of the host
  - g. A high-level budget and payment options
4. The host undertakes research of potential meeting/sleeping rooms, airline service, and availability of dates. It is the host's responsibility to contact, as necessary, convention bureaus, convention centers, and hotels
5. The NATHIST Executive Board reviews material by the host and requests any additional information.
6. The Conference Planning Team creates a high-level conference overview (about two pages) that includes:
  - a. Duration of the conference and hours the facility will be needed (include setup and breakdown)

- b. Dates and alternate dates of the conference
  - c. Approximate number of attendees expected
  - d. Whether industry exhibitors will be invited
  - e. Special services available: audio-visual equipment, storage of shipped materials etc.
  - f. Type and number of overnight accommodations for attendees, presenters, along with any relevant notes
  - g. The host's provisions for general security
  - h. Expectations with respect to food
  - i. Information on transportation from the airport to the hotel and host venue
  - j. Information on weather and any special clothing required (e.g. for outings)
7. The Conference Host presents the report to the ICOM NATHIST President and Secretary, who then provides feedback as required.
8. The ICOM NATHIST President reports to the Executive Board with recommendations.

## **Benefits of Hosting the Annual Conference**

- Provides personal and professional development for the staff of its hosting institution
- Develops new members through involvement in conference planning and activities
- Builds an international network of personal and professional friendships
- Hosting highlights the host institution's sector activities both within the host institution as well as to other external stakeholders
- Presents a catalyst for the host institution to celebrate its achievements publicly
- Recruits new members to ICOM NATHIST from conference attendees and those who read conference publicity materials
- Provide an invaluable service to the Natural History profession and to NATHIST
- Brings with it the possibility of sharing in conference revenue and/or leverage the conference for sponsorship

## **4. Selecting and Organizing the Conference Planning Team**

### **Introduction**

Conference planning begins with committee organization. Successful conferences depend on the teamwork and communication of committees. Strong committee structure ensures a unified vision of conference goals and policies and trains future conference committee members and leaders. For the annual NATHIST conference there should be at least one

primary chair, nominated to and approved by the Conference Host, who provides leadership for the overall conference and multiple committee chairs. Conference co-chairs and committee chairs comprise the Conference Planning Team. The team needs to develop its structure based on the particular characteristics of the planned conference and the people involved. It is recommended that the conference chair delegates major duties to committee chairs.

## Conference Theme

A well-chosen conference theme will help the program committee select prospective major speakers, guide the development of effective publicity, and unify conference activities. The theme will be determined by the Host, in communication with the NATHIST Board.

## Balancing conference activities

Conference goals and the needs of the anticipated audience determine the types of sessions and activities. Institutional visits provide in-depth examination of a single topic but are usually limited in size and require an extended time. Major speaker sessions are designed to appeal to most participants. Individual presentations offer current information in natural history, research projects, and innovations. Workshops provide the chance for hands-on interactive time. **Meal functions, social activities, and exhibits are integral parts of the total program and should not be curtailed in an effort to fit in as many sessions as possible.**

## On-Site Conference Chair Considerations

The conference chair is usually designated as responsible for on-site considerations, which may include local arrangements, registration, hospitality, and public relations. Other duties and responsibilities depend on the circumstances at the time, and could include coordination of the conference at the local level. This role also coordinates the actions of local committees dealing with overlapping activities (e.g., hospitality, speaker registration, and transportation).

In advance of the conference, the Conference Planning Team prepares the Agenda, which is a valuable tool for on-site communication and includes a conference overview and the host's needs. The Conference Planning Team uses this document daily during the conference as a reference. This document will ideally include the following:

1. Listing of group's key contact persons (title, address, telephone, fax, arrival/departure time)
2. Brief description of the group with a profile of attendees and the meeting's purpose
3. Review of the master conference accounts and who has signature authority
4. Conference agenda with room names used each hour
5. Audio-visual company selected to serve the group (if used)
6. Preliminary counts for banquets and catering
7. Mail and package procedures

8. Security provisions for the conference (e.g., registration area, exhibit hall, other needs)
9. List of all conference suppliers with contact name and telephone for each
10. Review of room reservations and procedures
11. Names of special guests who will attend
12. Other special issues to alert the host's management

#### Pre-conference meeting

1. Participate in a meeting that includes key conference planning team members and other key stakeholders to review the final agenda and address any last-minute concerns.
2. Hold detailed discussions with specific departments (e.g., food services).
3. Make copies of the Conference Program available to visitor services staff members who need a copy. Provide a copy for the bell stand and hotel help desk as these staff members are often asked for information.

#### During the conference

The following activities take place during the conference, under the guidance of the Conference Chair:

1. Conduct daily review meeting with key frontline staff and volunteers.
2. Meet at the end of each conference day to review expenditures for accuracy and adjustments.
3. Check all meeting rooms 60 minutes prior to the first meeting to ensure proper setup.
4. Check all food/beverage areas and banquet areas 60 minutes prior to use for proper setup.
5. Review that signage has been placed in public areas and outside of meeting rooms.
6. Review with the front desk any problems with registered guests being placed in nearby facilities if the hotel over-scheduled rooms.
7. Maintain a list of staff and volunteers who should be rewarded or recognized for their exceptional service during the conference.

#### Immediately following the conference

1. Prepare thank-you notes for hotel staff and suppliers.
2. Pack and ship all necessary materials from the venue.
3. Within 30 days after the conference ends, the NATHIST Treasurer and the Conference Chair review the final hotel and bill. Once the bill is deemed to be correct, it will be forwarded to the NATHIST Board who will also review the bill and coordinate the final payment by the Conference Treasurer and NATHIST Treasurer.

## **5. Program**

### **Typical conference schedule**

This generic conference schedule is included to help you in planning. The only activity that must occur at the annual conference (per the ICOM Statutes) is for the AGM to take place, unless it is organized at some other time during the year.



#### DAY ZERO (pre-conference)

- A day for Working Groups to meet. It is open to ICOM NATHIST members. This may take place in concurrent sessions or consecutive, depending on what needs to be accomplished and who is at which meeting.
- ICOM NATHIST Board members arrive
- Conference team ensures that all materials for participant bags have arrived and begin filling conference bags
- Exhibitors begin setting up

#### DAY ONE

- ICOM NATHIST Board Meeting (Board Members and invitees only)
- Welcome reception
- First keynote speaker
- First sessions of talks
- First group workshop
- Evening event (poster session or public lecture)
- Entertainment/exhibitor event

#### DAY TWO

- Second keynote speaker
- Second sessions of talks
- Second workshop
- Evening event (possibly poster session or public lecture)

#### DAY THREE

- President's breakfast (if held)
- Third Sessions of talks
- Annual General Meeting
- Conference Banquet and award presentations

#### DAY FOUR

- Institutional visit(s) – depending on the nature of the visit, this can involve overnighting

#### DAY FIVE onward

- Post-conference tour

## **The NATHIST Board responsibilities**

The NATHIST Board does not need to review every aspect of the conference, but is available for advice and guidance during the process. **There are, however, some elements that it must review and must approve before the conference organizer may make a commitment to move forward:**

- Conference budget (in particular the component that is requested from the Committee)
- Conference registration fees
- Exhibitor fee structure (if applicable)
- Overarching conference schedule (dates and times, rather than speaker lineup)
- Special events, especially where board members are requested to attend
- Keynote speakers, especially if their costs are to be covered

- Conference logo and theme, for consistency with the mission and graphic tone of NATHIST
- Forms, i.e., Call for Proposals, Call to Conference, Volunteer Forms, Conference. In some cases, these can be provided by the NATHIST Board (in English). *Please note: all NATHIST conferences are conducted in English.*

## Program Committee responsibilities

The Program Committee is a subset of the Conference Planning Committee. Generally, responsibilities consist of:

1. Solicit and evaluate program proposals and/or determine a system for selective invitations, such as “Back-by-Popular Demand” sessions. Send to professionals in related organizations as well.
2. Organize program elements such as oral papers and poster sessions.
3. If practicable, reserve an unscheduled meeting room space for any last-minute needs.
4. If no room has been specifically designated as a conference staff room, reserve a meeting room as near to registration as possible for a work room.
5. If presentation posters will be printed out on site, a standard format will be developed to fit with conference standards.
6. Schedule institutional visits, concurrent sessions, poster sessions, meetings, and other events; consult presenters to ensure that those with multiple conference responsibilities are not scheduled at the same time.
7. Prepare a rough draft of presentations as they will appear in the Conference Program.
8. Develop a schedule that reflects each day’s activities and locations
9. Prepare a day-by-day protocol to be reviewed with the NATHIST Board. Include arrival times, head table or reserved seating arrangements, duties and necessary tickets.
10. Check daily to determine that conference speakers and session presenters have arrived; otherwise, sessions may need to be canceled and posted.
11. Send a thank-you letter to each speaker, moderator, and chair.

## Selection of Keynote Speakers

There are typically two keynote speakers, one locally and one from international. Aside from their main presentation (45 minutes, plus 15 minutes for questions), keynote speakers are most often present for meal functions, chair general sessions, and can special workshops. Ideally, their areas of interest should resonate with the conference theme. Members of the NATHIST board can assist with selection of speakers, if required.

Written correspondence should contain clear information about financial arrangements.

1. One person from the Conference Planning Team should be delegated to contact keynote presenters, to ensure consistency of message.
2. Letters of confirmation should indicate the number of speaking sessions per day; number of autographing sessions; permission (or lack of) to video; any other responsibilities such as offering welcome to attendees; amount of honorarium; list

of what the NATHIST and/or Conference Host will provide such as meals, lodging, registration and transportation.

3. Confirm with speakers their willingness to be videotaped (if this is to happen) and/or provide their presentation materials for posting on the NATHIST website.
4. Choose major presenters for a specific date, time, and function. Review with them the time allotted for their presentations, the availability of A/V, and the distribution of their handouts.
5. In the case of major speakers, set up an area for them to provide autographs to allow more opportunity for speaker-attendee interaction. If it is media worthy, make sure to organize this ahead of time, and understand reporters' expectations.

## **Public events and those with outside organizations**

NATHIST committees may plan external events during the conference that are free to the public or are ticketed events. If such events are planned, the relationship between the Conference Planning Team and any special groups that have a presence at the conference should be one of collaboration and mutual respect for the integrity of both parties. The following guidelines should be followed:

1. The Conference Planning Team collaborates with the chairs of relevant standing committees (e.g. Awards or Promotions) and special interest groups to ensure that events are coordinated, appropriate arrangements are made, and potential scheduling conflicts are minimized. In addition, budgetary considerations should be addressed.
2. Any decision relating to the planning of these events must be coordinated exclusively between the Conference Planning Team and the entities (e.g., negotiations with all service providers, solicitation of funds, signing of contracts, etc.). NATHIST assumes no risk for these activities.
3. Any contracts related to activities planned must be signed by the Conference Host and responsibility taken for their agreed outcome(s).
4. All parties must adhere to the agreed budget. Invoices exceeding the budget will not be honored. Should any group attempt to solicit funds for their event from external sources, this must be cleared by the Conference Planning Team.

## **Receptions and special events**

The Conference Planning Team list the following special receptions and events in the Conference Program and the daily conference newsletter. It is the responsibility of the coordinators of each of these events to contact Conference Chairs regarding scheduling (time, date and venue location), providing AV and ordering food and beverage etc.

### Working group meetings

This event provides momentum and ideas exchange for members of working groups. NATHIST currently has two working groups: Anthropocene and the Wildlife Trafficking. Meetings usually take place one or two days before the main conference and are open to all interested parties.

#### NATHIST Board meeting

This meeting of the NATHIST Board provides an opportunity for discussing topics of concern to NATHIST leaders and making key governance decisions. This meeting is only for NATHIST Board Members and others, by invitation. It is held in a meeting room just before the main the conference. AV is typically not required, however printed material is usually distributed.

#### Pre-conference party

As many people arrive the day or evening before the conference begins, there is an opportunity to welcome travelers with a casual pre-conference get-together, with light refreshments and hors d'oeuvres. A gallery space in the venue is often a good option for this, to introduce people to the museum.

#### Opening reception

This event is open to all conference attendees, sponsors, invited dignitaries and other interested parties. Typically, the Conference Host will invite their key stakeholders to this event, even if they are not attending the conference. The reception can be themed at the Host's discretion and cost, however the cost of the reception itself is paid for with conference fees and/or sponsorship.

#### Public lecture(s)

These ticket events can happen at any time that can be worked into the schedule. Speakers are at the Host's discretion. ICOM NATHIST does not pay an additional fee or accommodation for people chosen to give public lectures.

#### Grand opening of the exhibit hall

If exhibitors are part of the event, a grand opening typically takes place in or near the area used for the trade fare. The exact nature of the event is determined by the Host, with advice from the Board if required. This event is open to all conference attendees.

#### Cultural heritage event

The Conference Planning Team coordinates this event. Plans may feature presentations of local flair and/or introductions of guests from outside the host country, as determined by the Conference Planning Team. This event may be held on- or off-site and is open to all conference attendees, and a separate attendance fee may be charged. Local tourism bureaus are often good partners for this event and can include theater, wine and food tasting, local crafts and music.

#### Award recipients' event

Awards are not given every year (although this may change, due to additional support from the ICOM Secretariat). When they are, this event is coordinated by the chair of the NATHIST Awards Committee and is open to all conference attendees. Depending on the length of the conference, it can be associated with another event, such as the conference banquet.

#### ICOM NATHIST Annual General Meeting

This is the only event that must happen during a NATHIST conference. This is the annual NATHIST meeting at which NATHIST business is conducted, various NATHIST leaders provide reports to the membership, new NATHIST officers are introduced, and important votes of

the membership are made on organization-wide issues and offices. This meeting is open to all attendees; the NATHIST President presides. AV is required, along with print matter.

#### Other receptions

Frequently local dignitaries (e.g. mayors, ambassadors, ministers, foundation chairs) will host receptions for NATHIST to mingle with their stakeholders. This is always at the hosts' expense but still must be coordinated with the Conference Planning Team. The NATHIST Board can also host a reception for the Host's donors, if arranged in advance. An individual exhibitor may also sponsor an event as a promotional activity, carrying all related expenses.

#### resident's Breakfast

This is a VIP invitation-only event and the guest list is developed in combination with the NATHIST President and the Conference Planning Team. Typical guests include the NATHIST Board and past office bearers, the Host museum's board and senior staff, museum directors who are conference delegates, keynote speakers and local dignitaries. This can be a ticketed event.

The purpose of this event is: a) to introduce the museum's board and local decision-makers to the world of natural history museums, b) to encourage international membership to NATHIST and, if ticket prices are charged, c) to raise money to help offset the conference. Breakfast would typically feature a continental, sit-down breakfast and a welcome by the President of NATHIST and a brief talk from invited speaker on a topic of general interest.

## **6. Finance and Delegate Services**

### **Conference Treasurer**

*This may or may not be the NATHIST Treasurer, depending on the capacity of the Conference Host.*

1. Develop a system for approving conference disbursements, paying bills, and informing
2. Conference Co-Chairs.
3. Obtain and keep all receipts for disbursements and reimbursements.
4. Pay all conference bills by check and allocate to budget line items.
5. Keep committee chairs informed of their budget status.
6. Close the conference books in preparation for audit by NATHIST and the ICOM Secretariat.
7. Make a financial report to the Conference Co-Chairs.

### **ICOM NATHIST Treasurer**

*If not the Conference Treasurer*

1. Establish the conference account.
2. Receive regular reports of deposits from the Permanent Conference Registrar.
3. Pay any outstanding bills after the conference books have been closed by June 1 following the conference.

## **Conference Management and Finances**

1. While the specifics of each conference may vary, the NATHIST Treasurer typically receives conference fees (registration, membership, exhibits, etc. but not tour fees or taxable items such as speaker book income) and deposits money in the NATHIST account. The Conference Treasurer requests access to these funds from the NATHIST Treasurer to cover conference expenses.
2. The Conference Treasurer accounts for conference receipts and expenditures.
3. No conference activities or benefits should be advanced to anyone unless prepaid. Only cash, check or designated credit cards should be accepted for payment. Purchase orders should not be accepted from individuals or commercial vendors. NATHIST does not buy back tickets nor offer to resell tickets for persons who decide to cancel an already-purchased ticket.
4. Refunds of the conference registration fee are to be disbursed using the following guidelines:
  - a. All prepaid conference fees, except a pre-determined handling charge, will be refunded by the NATHIST Treasurer if the request is received in writing in advance of the conference. The refund should be mailed within four to six weeks of request. Requests for refunds that do not fall within prescribed guidelines or that are questionable should be referred to the Conference Chair for review before payment. If a refund request is refused, the Conference Chair must explain the reasons for the refusal in writing with an offer of the option of appealing the refusal to the NATHIST Executive Board.
5. Conference bank accounts should be closed by December 1 following the conference. Thereafter, the NATHIST Treasurer accepts additional deposits and writes checks for approved conference expenses.
6. All commitments of expenditures of conference funds require written agreement of two or more Conference Chair and/or Conference Treasurer

## **Conference budget review and approval**

1. A high-level conference budget must be approved by the NATHIST Board prior to the Host committing funds to the conference, with particular reference to any funds expected from NATHIST. NATHIST is not responsible for budget overruns.
2. Correspondence and/or promotional items to be distributed to the membership-at-large must be approved in writing by the NATHIST communication team.
3. The NATHIST Treasurer will provide technical assistance to the Conference Chair and Conference Treasurer before, during, and after the conference.

## **Major Income Sources**

### **Registration**

The amount of the conference registration fee is determined by the Host in consultation with the NATHIST Board. This fee is based on a conservative estimate of the number of attendees and anticipated expenses. In general, conference fees should be kept as low as possible.

### **Exhibitor fees**

The Host determines the fee schedule for exhibitors, with assistance from the NATHIST Treasurer, if required.

## Gifts, donations, sponsorships, and fund-raising

Conference planners may seek corporate sponsorship of conference events and speakers; to do so, they may need to create a marketing piece that represents NATHIST and the conference. In this case, the Conference Planning Team should send any marketing pieces to the NATHIST marketing team for approval before distributing. Sponsorship opportunities may include:

- Hosting an event such as a breakfast
- Giving a talk at the beginning of a session
- Branding on conference signage
- Being included in promotional material or collateral, such as the schedule or book of abstracts

This is typically negotiated through the Host, in consultation with the NATHIST Board. Any promises made of NATHIST Board (e.g. appearances on the NATHIST websites, personal greetings etc.) must be approved in advance.

## Merchandising

Fund-raising projects, such as the sale of bumper stickers, pins, books, etc., should be listed under income if the proceeds from the sale of the items exceed the cost of purchasing them. Design, development costs and distribution are the responsibility of the Host. All designs must be approved by the NATHIST Board prior to production.

## Receptions and Special Events

Ticketed events have the opportunity to earn revenue. All costs associated with these are the responsibility of the Host and income earned in this way may be kept by the Host to offset conference costs.

## **Major expenses**

### Speakers and Keynote Sessions

Aside from bursary winners, these speakers are usually the only people who receive expense reimbursements. When estimating expenses, consider transportation, meals and lodging. A speaker's fee is only given under very special circumstances (e.g. a very famous person whose fee has been sponsored externally). These items are negotiable solely between the Host and the speakers.

### Facilities

Meeting rooms, exhibit hall (drayage, table rental, drapery, etc.) general decorating, security, and audio-visual equipment charges are major expenditures.

### Printing

Printing can include the Call for Proposals, conference promotion flyers, the final Call to Conference, Conference Program, invitations, meal function tickets, postcard reminders, and other items. Consider electronic files connected to the NATHIST website when appropriate to save printing costs. Plan to print extra copies of all materials to pass along to future conference planners.

### Postage

Costs vary depending upon the targeted market. Electronic communication can be used to save postage costs.

## **Food and Beverage Functions**

Depending on the venue, this can be the most expensive component of the conference. Expenses include the actual cost of the meal (including potential tax and gratuities) and may include an additional amount to cover cost of meals and refreshment breaks, printing tickets and menus, flowers, meals of head table guests, and table decorations.

## **Equipment Rental**

At the discretion of the Host, the conference may contract with an AV company or the hotel/convention center (if used) to provide basic AV equipment for concurrent sessions and institutes. The Host may provide a workroom with equipment that may include a copy machine, computers, and printer. This is typically only done for conferences of 400 or more delegates.

## **Conference bag and contents**

A conference bag is normally provided to every participant and sometimes to exhibitors as well. It is, however, at the discretion of the Host. If there is to be a trade fair, a minimum of at least one copy of the conference program should be provided to each paid exhibitor. Ideas for bag insertions are provided in a separate section, below.

## **Transportation**

Shuttle service may be required if multiple facilities are used, and costs for this service should be included in the budget. VIPs may require driving, depending on the nature of the agreement between them and ICOM NATHIST.

## **Provision of Services for Attendees with Disabilities or Dietary Concerns**

1. The Conference Planning Team must respond appropriately to any conference attendee with a physical disability and provide accommodations. In the United States, this is covered by the Americans with Disabilities Act (ADA) and by equivalents in many host countries. It is recommended that someone who is knowledgeable about these requirements be assigned this task.
2. The conference registration form will contain both a space for registrants to express a need for physical disability accommodations and a contact person on the Conference Planning Team.
3. If the conference provides information about transportation (e.g., airport/hotel, commercial tours, and side trips), it should be checked to see whether the company has a wheelchair and can accommodate those with disabilities.
4. The Conference Planning Team must accommodate special dietary needs as requested by conference attendees and indicated on the registration form. It is important to provide sufficient variety that fulfilling the dietary requirements does not appear to be an afterthought.

## **Conference fee waivers**

1. The ICOM NATHIST Policies and Procedures Handbook allows for 10 members of the conference planning team to receive fee waivers. These fee waivers are to be assigned at the discretion of the Conference Chair, who prepares and sends fee waivers to appropriate persons.



2. Additional fee waivers (e.g. for sponsors or VIPs) are reviewed on a case-by-case basis and a final decision rests with the ICOM NATHIST President.
3. For budget purposes, fee waivers are listed as both an expense and income.
4. Employees of the host museum are usually not waived, unless it can be worked as part of the overall conference budget (e.g. through sponsorship).

### **Student bursaries and other awards**

The NATHIST Student Bursary is awarded only at the triennial General Assembly. Additionally, in 2018, the ICOM Secretariat will provide additional funds to support conference travel. Details of this support has not yet been released. Awards are typically presented either at the conference banquet or the poster session, depending on their nature. Rules around NATHIST awards are described in a separate document.

### **Financial reports**

1. Conference Co-Chairs must render a full financial report of the conference by December 1 to accommodate the ICOM's year-end accounting requirements.
2. Conference reports are subject to audit as determined by the ICOM NATHIST Board.

## **7. Registration Policies**

- Policies apply equally to everyone. Failure to adhere to this creates long-lasting ill will among registrants who follow the rules, only to find out that someone else was given an exception.
- Registration deadlines should be adhered to, for the sake of overall work flow. However, by agreement, extensions may be granted.
- Payment, if payment is due, must accompany the registration form. Forms sent in without payment are not processed. We do not hold or reserve seats.
- Keynote presenters must register for the conference (for catering) but are not required to pay. All others must register, whether they are presenting or not.
- Exhibitors who receive a name badge as a consequence of being named as a rep as part of their package purchase are considered registrants. If a company wishes to send more reps than their booth package permits, the additional reps must register for the conference using the regular registration form and are not permitted to use the "Visitor" category.
- As far as other registrants are concerned; every registrant's information is confidential.

## **8. Entertainment**

Ambiance and comfort are important for conference attendees. An enjoyable atmosphere can help people be more attentive and receptive to the program offerings. Some ideas about how to entertain conference attendees include the following:

- Provide soft instrumental music in the museum venues, food receptions, and other events where people are gathered. Hire musicians from local music conservatories,

college music programs, or local commercial musicians. The Conference Host may have a list of local entertainers. Be sure to preview entertainers to ensure quality.

- Publicize entertainment that the venue already provides to its guests.
- Ensure an adequate sound system is used by entertainers to enhance their performance.
- Check on entertainers' special needs. Most require at least one rehearsal at the performance site. In addition, the room may need to be available for additional hours.
- Discuss other amenities required such as dressing rooms and refreshments. Consider whether the entertainer wishes to sell music CDs or other merchandise and when and where this might be scheduled.
- If music is played or performed at any conference event (even in the exhibit hall by commercial exhibitors), be sure music licenses have been purchased appropriately.
- Provide an organized, fee-based evening event during the conference. Allow for event preregistration in conference registration materials. The evening event might be a sporting event, dinner theater, dinner/shopping tour, or concert.
- Consider hosting events at partner organizations nearby, to increase diversity of the experience and exposure for the community.
- Consider providing "No host" entertainment, as an alternative for scheduled activities, for delegates' companions. Conference planners can help attendees make their own plans by providing plenty of information about local attractions. This information may be included in the initial conference brochure, conference confirmation packet, or onsite at the conference. The "Hospitality Desk" is an important service provided to conference attendees.

## 9. Attendee-related Issues

### Registration

In order to provide attendees with sufficient information about the conference, a well-developed call to conference with registration information is essential. Prior to publishing the call to conference, carefully review and proof the materials and ask others besides the Conference Planning Team to do so as well.

#### Call to conference

Call to conference materials should include the following:

1. Association name and logo
2. Conference theme and strands
3. Date(s) of conference, with beginning and ending times
4. Location of conference with a map, if necessary
5. Conference registration form
6. Information and registration forms for tours and other activities for conference attendees and their guests
7. Hotel accommodations (e.g., prices, locations, registration form, availability of Internet)
8. Background information on the host city and surrounding area

9. Transportation information (e.g., recommended airline, options for transportation from airport to hotel, driving instructions to the hotel, map of vicinity of the hotel)
10. Tentative conference schedule
11. Short description of special events (e.g., Opening Reception, Meal Events, Awards Reception)
12. Welcome letter from NATHIST President
13. Contact information for Conference Chair
14. Information on keynote speakers
15. Payment information (e.g., deadline for early registration, instructions concerning use of institutional purchase orders, confirmation of registration, refund policy, credit card instructions).

### Registration Form

The Conference Planning Team, in collaboration with the NATHIST Board develop the registration form that includes:

1. Basic registrant information such as name, institution, mailing address, phone numbers, and email address
2. Registration categories
3. Registration deadlines and other information such as payment options, registration categories, and refund policies
4. Pre- and Post-Conference Institutes and special events options
5. Payment information
6. Individual membership application
7. Assistance/accommodations needed because of disability
8. Dietary restrictions or requirements
9. Registration policies
10. Permission to release contact information to exhibitors

### Conference Program

The Conference Program should include the following items:

1. Front Cover: Title, conference logo, NATHIST name and logo, year of the annual conference and host/venue
2. Inside Front Cover/First Few Pages: Welcome letters from NATHIST President and the Conference Host, sponsors' logos etc.
3. Table of Contents
4. Advertisements, if any
5. Conference Information – conference schedule, featured speakers, working group meetings, location, descriptions, invitation to attend any of these groups
6. Special Events – opening reception, cultural heritage, conference dinner, public lecture, celebration breakfast (if any), project updates, conference tours
7. Day-by-day schedule – Day at a glance, day activities highlight, pre/post-conference institutes with time and location. These can be provided in daily form
8. Poster sessions (if any)
9. Awards and accolades
10. In Memoriam page if any NATHIST members passed away that year

## The Conference Bag and What's Inside

The conference bag is a well-loved tradition in NATHIST, as in many other societies. Aside from providing a place to store conference materials, it provides a lasting memory of the event and an ongoing reminder of NATHIST. Ideas for contents include:

- Material from the local tourism authority
- Toys and/or other gifts, especially from the museum's gift shop
- A map of the institution and the city
- Conference program and book of abstracts
- Post cards
- Note books and pens, ideally branded
- Recent NATHIST publications
- Sponsor material (the sponsor would typically pay for this opportunity)
- Coffee mug or drink bottle
- NATHIST Fact Sheet
- Distribute registration packets. Note: It is very important that registration workers double-check these envelopes for accuracy. This packet may be an envelope with the registrant's name appearing on the outside and containing the following materials:
  - a. Meal tickets
  - b. Name badge
  - c. Photocopy of registration form and receipt
  - d. Pre- post-conference institute admission tickets and tickets for other ticketed events
  - e. Instruction typed on envelope stating "Please check to see that all workshop and meal tickets for which you paid are in the envelope. Missing, lost or stolen tickets cannot be replaced."

Distribute special materials for designated registrants. In order to ease the process, place different colored dots on registration envelopes of the following individuals:

- a. Conference presenters. Sometimes additional packets or gifts are given to them. Recent conferences have also given small gifts to program strand leaders, moderators, and proposal readers.
- b. Conference moderators. Generally, an additional packet of information is provided at this time, either at the registration counter or at a separate table near registration. In this packet, provide instructions for the moderator, at least 50 evaluation forms.
- c. Attendees with incomplete fee payments. These attendees need to see the Conference Chair in the registration area due to problems of fee payment (e.g., institutional check not arrived, additional payment needed to cover additional meal events).
- d. Conference exhibitors. Generally, these individuals have registration materials provided directly by the Conference Chair.

The following suggestions will help ensure a steady, uninterrupted registration flow:

- a. Designate one person to answer the telephone in registration area

- b. Have persons assist with minor problems, but steer people with major problems to the Conference Chair
- c. Have conference hosts and hostesses available in registration area to greet and assist people waiting in registration lines
- d. Have a copier available and supplies accessible with a runner available to replenish supplies
- e. Have short, explicit signs large enough to be read across the area
- f. Have someone with authority available to make decisions
- g. Open registration a day early for special invited guests, staff members, and early arrivals
- h. On Day One, keep registration open into reception hours to allow late arrivals to register and receive their reception admission tickets
- i. Hold a staff meeting prior to registration to review procedures; anticipate questions and problems that may arise

## 10. Hospitality

The hospitality area of the conference covers a variety of issues:

- 1. Providing an inviting atmosphere for attendees as they become oriented to the venue
- 2. Providing information concerning side tours, restaurants, and local entertainment
- 3. Providing other means to make attendees feel comfortable during their stay, i.e., having hosts and hostesses stationed throughout conference facilities to assist attendees

### Hospitality Table

It is helpful to have a hospitality table separate from the conference registration area. The hospitality table is a source of information not related to the “official” conference program. Frequently, this area becomes the “lost and found” location during the conference. Because of its nature, it is most helpful for the hospitality table to be located near the registration desk and the museum’s main entrance. Conference staff members who are familiar with the conference city should provide materials at the table for attendees’ use. A few key materials may already be included in the conference bag.

#### Types of materials at the hospitality table

- 1. A desk copy of the Conference Program
- 2. Complimentary maps of the city
- 3. Guides or maps of the vicinity surrounding the conference hotel that indicate eating, entertainment, tourist sites, medical, pharmacy, and shopping venues
- 4. Copies of menus from eating establishments in the hotel as well as popular locations in the city
- 5. Daily copy of the city newspaper; daily/weekly copy of ethnic newspapers
- 6. Entertainment calendars

7. Transportation information (e.g., bus schedules, trolley car schedules, cab information)
8. Coupons from local restaurants and shops
9. Information and registration form for NATHIST side tours and entertainment options
10. Copies of all NATHIST conference daily newsletters and announcements
11. Copies of tourist brochure available for the city and surrounding area, provided for display purposes

### Food-Related Accommodations

- Regardless of the number of people who indicate that they need a non-meat meal, have the hotel prepare at least 5 percent vegetarian or vegan meals. Always have gluten free meals available, as this allergy is growing.
- Wait staff should be authorized and prepared to offer other alternatives with beverages and meals, even if persons did not announce their needs ahead of time.

## **11. Exhibitors**

The NATHIST conference is an ideal venue for international industry service providers to demonstrate their capability to a sympathetic audience. The main organization of exhibitors and associated sponsorship rests with the Conference Chair. It is usually advisable to have this activity handled by a professional, unless this is a regular activity of the Host institution.

At a high level, responsibilities include:

1. Maintain and update contact information of prospective exhibitors and sponsors, and make available to Conference Planning Team.
2. Annually contact all prospective exhibitors and sponsors to refer them to the NATHIST website where information for conference exhibitors should be available.
3. Ensure that a conference solicitation letter or email to prospective exhibitors and sponsors is sent.
4. Maintain and add to a directory of exhibitors as appropriate.
5. Work with the Committee Coordinator to prepare slides of the exhibitors at the eligible levels (see current exhibitor form) and their logos to be part of the slide show projected on a screen prior to general sessions.
6. Issue the Exhibitor packet, which includes the Exhibitor Order Form and Call for Concurrent Session Proposal Form. If the floor plan of the exhibit area has been obtained, highest level exhibitors may be able to reserve desired booth space at the previous year's conference.
7. Assign exhibit spaces when final payment has been received.
7. Prepare a list of exhibitors and locations as well as a list of those who deserve special recognition for providing major sponsorships.
8. Check all exhibit hall booth numbers for accuracy before exhibitors begin to arrive. Be available to welcome exhibitors and show them to their booths.
9. Arrange and operate an exhibitor registration area during the conference.
10. Arrange for security guards, especially if exhibits are in hallways or unsecured rooms. Be certain that security guards are informed of the procedures for exhibitor check-in.
11. Consider providing volunteers to watch booths while exhibitors take brief breaks.

## **Exhibit Areas and Fees**

Work with the Conference Planning Team to ensure that exhibit areas are near freight elevators or exits that allow easy set-up and dismantling and have access to sufficient lighting, ventilation, and electrical outlets. Exhibitor fees are set to cover the costs of set-up and decoration.

### **Invitations to Exhibitors**

The Exhibitor Order Form should be provided to current exhibitors at the previous year's conference and mailed to prospective exhibitors at least eight months (check with timeline) before the NATHIST conference, if available, and should contain the following information:

1. Description of the conference including location, dates, and projected attendance
2. Floor plan of the exhibit area with booth locations indicated
3. Policies set by the conference site and host organization
4. Set-up hours and times for the exhibit hall to be open to attendees, typically
5. Housing information
6. Invitation and application form that includes fees and payment information
7. List of all possible ways exhibitors may choose to be of additional service to the conference
8. Invitation to attend all non-fee conference activities and the opportunity to purchase tickets for all fee-based conference activities at the same cost of other conference attendees.

## **Hospitality to Exhibitors**

1. Provide substantial food and beverage for exhibitors and sponsors the afternoon of set-up prior to the grand opening of exhibits.
2. Provide a light hors d'oeuvre or dessert reception at the close of the day's exhibits.
3. Provide a separate room or privately sectioned off area in or near the exhibit hall for use as a break area for exhibitors. Provide light refreshments and chairs in this area.

## **Providing Exhibitors with Maximum Exposure**

1. Design exhibit hall floor plan to ensure optimum traffic flow to all exhibitor areas.
2. To promote attendance at the grand opening, avoid scheduling other events at this time and provide door prizes or other appropriate incentives for attendees.
3. When feasible, hold all continental breakfasts and a coffee break station in the exhibit hall.
4. Locate food and lounge area in the farthest area of the hall to encourage attendees to walk through the hall to reach food and beverage.
5. Consider selling box lunches at the back of the exhibit hall as a service to exhibitors and to attract more attendee foot traffic.
6. Consider scheduling poster sessions in the exhibit hall.
7. Locate a Cyber Café in the exhibit hall.
8. Consider having special drawings for door prizes in the exhibit hall.

9. Provide an option for exhibitors to host a reception at their expense in a meeting room after concurrent sessions are over for the day. It is the responsibility of the exhibitor to pay for, schedule, and promote the event.
10. Attempt to schedule some set times each day when the exhibit hall is open and there are no conflicting conference activities.
11. Reserve a concurrent session room space specifically for exhibitor strand presentations.
12. Consider a looped slide presentation prior to each plenary showing the vendor logos.

## **Special Vendors**

Local vendors who sell various arts and crafts may also be provided with a booth on a space available basis, the fee for which may be negotiated by the Conference Planning Team. For example, to provide attendees with access to local vendors, the vendors may be charged a nominal fee of \$100 or be asked to make a comparable contribution of their products for door prizes etc.

# **12. Promotion and Publicity**

## **Marketing the Conference**

- Publicizing the conference to members may be done in a variety of ways such as postcards, the NATHIST website with a link to the conference website, email messages, and first-class mailings to members. Because mailings go to many different addresses, bulk mailing permits are not feasible. All publications should include both the NATHIST logo and the conference logo.
- Good publicity is vital to a successful conference. Send conference information to as many relevant groups as possible, such as other professional organizations and legislators.
- Create conference publicity that will be informative and appealing to potential conference attendees.
- Conferences can be promoted by the following:
  - Emphasis on major speakers and their topics
  - Number of people and exhibitors likely to attend
  - Benefits derived from attending the conference
  - Attractiveness of the conference location and availability of tours that capitalize on the history and uniqueness of the conference city
- Local media is usually interested in covering the conference as an important news event. Contact the reporter in charge of education affairs six months in advance of the conference to plant seeds of interest. The reporter may be interested in the background of NATHIST, major speakers on the schedule, and the local chapters hosting the national conference.
- Conference planners may choose to hold a press conference in conjunction with the conference. This frequently happens as part of triennial general assemblies.
- Keynote speakers should provide the Program Chair with detailed biography. If the keynote speaker(s) is willing to speak with the press while in the host city, provide a media kit for local radio and television stations and newspapers.



- Media kits should include:
  - An NATHIST Fact Sheet, short biographical sketches, photos of keynote speakers and basic conference information.
  - Each page should list a contact person with telephone number and email address.
  - Kits should be addressed to a specific person and followed up with a personal telephone call.
  - Media reporters are extremely busy, so it is best to send kits approximately two weeks before the conference and follow with a call to reporters a day ahead of time to alert them to watch for kits to arrive in the mail.

The Conference Planning Team should generate sample letters for local leaders to use to sign proclamations regarding the importance of the issues discussed at the conference. These letters should be reviewed by the NATHIST communications officer. These activities may take several months of preparation.

### **Keeping a Visual Record of the Conference**

Carefully chosen images provide a visual history of the conference and should be made available to the NATHIST Newsletter, Marketing Committee, and on the NATHIST website. Such images should include major events, keynote speakers, award winners, conference planners, and current and incoming NATHIST Executive Board members as well as a few candid shots at receptions, in the concurrent sessions, and in the exhibit hall. A video presentation of photos taken during the conference may be made to be shown during the President's Breakfast (if it is held).

## **13. Programming for Conference Companions**

is important to remember that more conference attendees are bringing companions along on conference trips in order to combine business with vacation time. Offering activities for guests and family members may attract more attendees who seek to combine the conference with a vacation. The following should be considered:

- Be clear in conference policies regarding admission to specific events. Clearly identify which conference activities guests may attend.
- Promote educational, recreational, and shopping activities that are offered at or near the hotel (e.g., health facilities, golf, tennis, live theater, movie theaters, etc.). Promote conference tours for this group of special guests and family members.
- Provide brochures, maps, and transportation information at the conference information desk.
- Contact the local convention and visitor's bureau for ideas.
- Refer guests with child-care needs to the hotel concierge.

## 14. Final Conference Report

Conference Co-Chairs submit a summary conference report by December 1 following the conference. Final Budget Report that may take whatever form on which the Conference Treasurer and the NATHIST Treasurer agree.

Conference report template is currently in development and, when complete, will be accessible from the NATHIST website.

## Appendix: Amendments for a General Assembly

very three years, ICOM NATHIST holds its annual meeting as part of the ICOM General Assembly. Organization is typically done by the National Committee of the host country. The degree of involvement by the ICOM NATHIST Board varies from year to year. Typically, the venue is chosen by the central organizing committee, although ICOM NATHIST usually has input, especially with field trips etc. In this case, the major preparation involves voting at the Annual General Meeting and organizing the speakers around plenary events.

**M NATHIST** ICOM  
international committee  
for museums and collections  
of natural history