

## **NATIONAL ESP CONFERENCE GUIDELINES**

...they see the oak tree in the acorn and understand the process of helping the acorn become a great oak tree.

Excerpt from PRINCIPLE-CENTERED LEADERSHIP by Stephen Covey (1992)

The annual National Conference of Epsilon Sigma Phi is the —centerpiece national professional development event. The processes of planning, implementing, evaluating and sharing the story about conference’s impact are intended to contribute to the acquisition of leadership skills for members. To achieve continuity between National ESP Conferences and to enhance the efficiency of staging the event, these guidelines are provided as a springboard for planning.

The National ESP Board, the National Professional Development Committee and the local arrangements committees in the host state(s) comprise the production team. As that team progresses in its work, many opportunities will emerge to move in ways differing from the guidelines.

From these “acorns - the guidelines - “great oaks will grow”

### **Purposes of the National ESP Conference:**

1. Provide professional development for members, including opportunities for members and non-members in the Extension System to make scholarly presentations reporting research and accomplishments of significant programs which contribute to official national initiatives.
2. Recognize recipients of national and regional recognition and provide an opportunity for the presentation of the Annual Distinguished Ruby Lecture.
3. Conduct the business of the National ESP Council.
4. An opportunity for national committees to meet face-to-face.
5. Stage a fund-raiser (i.e. Auction) for the Epsilon Sigma Phi National Development Fund.

### **When and Where:**

The National ESP Conference will be held at a time that does not conflict with religious holidays and other professional association meetings of partner organizations.

The National ESP Board will set the dates and the site for the National ESP Conference three years in advance based on bids submitted from a chapter(s) in the designated region.

Every attempt should be made to schedule the National ESP Conference within the first two weeks of October.

2014 – Indiana

2015 – Idaho

2016 – Northeast

2017 - South

### **Bids to Host the National ESP Conference:**

The regional vice president for the host region will initiate the distribution of information to chapters and will encourage them to submit National ESP Conference host bids.

The regional vice president will initiate the call for bids from the states in the region prior to the regional meeting of the year in which the region must submit a bid. The regional vice president will direct states wishing to submit a bid to the Bid Guidelines as found in the National ESP Handbook. The potential bids will be discussed at the Regional Workshop where the regional vice president will provide guidance to states wishing to submit bids. The regional vice president will report on discussion held at the regional meeting and may make a recommendation to the National ESP Board, at the Mid-Year Board Meeting where the selection of the bid will be made.

The final announcement of the site which was selected by the Board will be made at the National ESP Council Meeting three (3) years in advance of that National ESP Conference.

### **Budget:**

The National ESP Conference is to be financially self-sustaining and it is expected that the conference should generate some profit. The Conference Budget Committee will be made up of the Host Chapter Chair (or a designee), the National ESP Executive Director and the National President Elect / Chair of the Professional Development Committee.

The Conference Budget Committee will prepare a budget which will be submitted to the National ESP Board for their approval at the Mid-Year Board meeting prior to the National ESP Conference. The conference registration fee will be established by the National ESP Board based, on the approved budget, at the Mid-Year Meeting.

The budget should show the in-kind contribution that is being provided by the host state. The host state should be able to factor in a cost to be able to address contingencies that may arise. The budget should include the complimentary items obtained from the conference facility to provide a clearer picture of the true cost of the conference. A final

budget report should be provided to the board by the Conference Budget Committee to be included in the permanent records of the National ESP Organization.

National Epsilon Sigma Phi will charge a Program Related Direct Cost Fee to the National ESP Conference budget. Fee is on a per person basis.

The host chapter, National ESP Board members and Professional Development Committee will remain constantly alert to opportunities to maximize the use of resources through collaborative relationships and in-kind contributions. Host chapters are requested to provide some local hospitality, etc.

To provide an added incentive for a successful conference, the Host Chapter and the National ESP Organization will divide the proceeds of the conference with 20% going to the host state and the National ESP Organization retaining 80%.

#### **Contracts:**

The National ESP Executive Director and/or National ESP President or their designee will sign all contracts binding upon the National ESP Organization for the National ESP Conference. Cancellation insurance will be used to provide protection against forced cancellation of the conference.

#### **Local Arrangements Committee:**

The host chapter(s) will appoint a local arrangements chair (or site chairman) three years before the event. Subsequently the Local Arrangements Committee (site committee) should be selected by the chapter president and the local arrangements chair. The local arrangements chair and the Professional Development Committee Chair need to meet face-to-face at the National ESP Conference to make plans to proceed with the conference for the next year. Local arrangement chairs will be appointed to positions on the professional development committee and will serve the year prior to and the year of their National ESP Conference.

Suggested duties for the Local Arrangements Committee are outlined in the Section on Host Chapter Responsibilities. The Local Arrangements Chair or a designee will make the initial contact with the conference site hotel or other facilities to make arrangements negotiate prices, etc. The local arrangements chair, the National ESP Executive Director and the Professional Development Committee Chair must coordinate planning efforts to maintain a good flow of communication.

#### **Professional Development Conference Program and Distance Learning Activities:**

The national Professional Development Committee will develop a proposal for the National ESP Conference program and distance learning activities (could be either

simultaneous or at different times). The program proposal should contain a theme, objectives, a schedule, keynote speakers, and concurrent sessions, etc.

Distance learning opportunities should be explored as a way to serve more members, by providing additional access to the National ESP Conference. The proposed agenda will be presented to the National ESP Board no later than six months prior to the National ESP Conference. Budget and evaluation plans should accompany the proposal. The conference program is approved by the National ESP Board.

### **National ESP Council Meeting:**

The official annual meeting of the National ESP Council is to be held during the National ESP Conference. See the section on host chapter responsibilities of ESP National Council Meeting for more information regarding the annual meeting.

### **Recognition Banquet:**

The national and regional recognition presentations will take place as the finale event of the National ESP Conference.

### **Distinguished Ruby Lecture:**

This lecture is an important part of the professional development offered at the National ESP Conference. The winner of the Distinguished Service Ruby Recognition will be one of the Conference keynoters at an event conferring a sense of significant honor to the recipient.

### **Fund Raiser for the Epsilon Sigma Phi National Development Fund:**

During the Conference there should be a major fund raising activity for the financial benefit of the Epsilon Sigma Phi National Development Fund. The host chapter(s) will conduct this activity in close cooperation with the National ESP Board. (If that event is an auction, guidelines appear in the auction section of this document.)

### **Registration:**

The conference registration fee is set by the National ESP Board based on the budget information presented by the Conference Budget Committee. The registration process shall be handled by the ESP National Office or through the Host State where the conference will be held.

The National ESP Executive Director and the Professional Development Committee Chair will give leadership to the registration activities at the conference. Assistance with the registration activities at the conference site will be provided by the host chapter(s).

Conference publicity and registration materials will be distributed to members through the ESP website, in the ESP Connection and through other means as appropriate. The registration information and the conference program information will also be available on the Epsilon Sigma Phi Website which is located at: <http://espnational.org/>.

Invitations to the National ESP Conference can be issued to special guests by the National ESP President. He/she will personally invite State Directors of Extension and national administrative personnel in the Extension System to participate in this professional development conference.

The recommended registration due dates are as follows: early bird registration deadline - will be approximately 75 days before the conference, regular registration deadline - will be one month before the conference, and late registration will run through the conference. When registration is determined, consideration should be given to day registration, guest meal registrations, extra meal tickets, non-member registration and tour registration. Complimentary registrations are extended to the presidents or their designee from the JCEP partner organizations. JCEP Traveling Team members (presidents) should complete the registration process even though they are provided a free registration to aid in planning meals.

In the registration process, consideration should be given to asking registrants select the concurrent sessions they plan to attend to be able to match room sizes with projected attendance.

**All presenters must register for the entire conference to be eligible for the presentation stipend.**

## **BID GUIDELINES FOR HOSTING NATIONAL ESP CONFERENCE**

### **Timeline:**

Bids are considered at the Mid-Year Board Meeting of the National ESP Board for the National ESP Conference three (3) years hence. At the prior regional workshop, the Regional Vice-President should lead discussion of possible bids from chapters and prepare materials for the chapters submitting bids for consideration by the National ESP Board.

States considering the submission of a bid should be directed to follow the guidelines found in this section of the handbook. The announcement of the selection of the bid is made at the National ESP Council Meeting.

### **Regional Rotation:**

The host state will rotate among the four regions when appropriate and possible: Northeast-2011, South-2012, Galaxy IV-2013, North Central-2014, West-2015, Northeast-2016 and South 2017.

### **Information to Submit with the Bid:**

1. Dates. Please include information indicating that the dates do not conflict with the annual conferences of the JCEP partners and any patriotic or religious holiday of members indicating sensitivity to the celebrations of a diverse population.
2. Host City
3. Conference planning should be based on an attendance from 200 to 250 members.
4. Tentative commitment from Hotel of choice
5. Hotel charges and contractual obligations (there is a strong preference for hotel contracts that limit the financial liability for Epsilon Sigma Phi):
6. Hotel and other facility cancellation policies and under use of sleeping rooms penalties
7. Fees for audio visual use (and policies for host state providing some of the audio visual equipment), microphones, hospitality rooms, and other incidental expenses
8. Internet accessibility and associated charges for meeting room use and in sleeping rooms.
9. Guest Rooms (25 single, 75 doubles, suites, complimentary sleeping rooms) -guests make their own reservations and payment in a reserved block of rooms.
10. Meeting rooms - 1 room large enough to seat 250 banquet style (Ruby Luncheon and Awards Banquet); 1 room large enough for 250 people auditorium style (can be the same room as banquet room); 6-8 small meeting rooms to seat 30-40 classroom style; and a conference room to be used before and after the conference must seat 20 - a U-conference table arrangement. Ideally, the 6-8 small meeting rooms would be in addition to the banquet room.
11. Space for Registration and up to six display tables
12. Space for Poster sessions with display tables or wall hanging of posters, floor easels for 20 posters would also be acceptable.
13. Place to store audio visual equipment and auction items
14. List any additional charges
15. Other information regarding - Meals, parking, taxes, space for small displays, complimentary sleeping rooms, shuttle service, etc.
16. Capabilities for distance learning such as satellite uplink, web streaming, etc.
17. Location of Hotel in relation to major airports, local attractions, shuttle services, etc.
18. Potential off-site attractions for tours, free time, guests, etc.
19. Letter of invitation from host state Epsilon Sigma Phi Chapter President
20. Letter of invitation from State Director of Extension in host state(s). The letter of invitation should include descriptions of the information and communications technology available in the state for transmitting and receiving distance learning programs associated with the Epsilon Sigma Phi National Professional Development Conference. Access to technical support staff related to these technologies and learning applications should be included in the descriptions. Opportunities for Epsilon Sigma Phi to co-sponsor distance learning with the host university are strongly encouraged.

21. Willingness to accept host state(s) responsibilities suggested in the handbook
22. Provide a listing of potential donors of financial and in-kind resources (not a requirement). (Some in-kind contributions could be flowers/corsages, decorations for banquet and general sessions, audio visual equipment, auction costs, tour costs, photographer, entertainment, registration services, printing, distance learning costs, etc.)
23. Provide a potential listing of professional development tours which might be incorporated with the conference or which might be offered either pre-conference or post conference.
24. National ESP Conference Proposal Evaluation Form
25. Any other pertinent information
26. Services provided and cost

## NATIONAL ESP CONFERENCE BID PROPOSAL EVALUATION FORM

STATE/CHAPTER: CITY:

PROPOSED CONFERENCE DATES:

DATE CONFLICTS

NATIONAL MEETING DATES:

- NACAA
- ANREP
- NEA4-HA
- NEAFCS
- NACDEP
- OTHER

RELIGIOUS HOLIDAYS:

AIRPORT:

- AIRLINES
- SAMPLE AIRFARES FROM MAJOR CITIES
- AIRPORT TRANSPORTATION TO THE HOTEL

HOTEL:

- ROOM RATES - ROOM TAX - LAYOUT/MAP
- FOOD SERVICE POLICIES AND MENUS CONTRACT:
- MEETING SPACE (AVAILABILITY AND CHARGES ASSOCIATED WITH USE)
- GENERAL SESSION
- BREAKOUTS (6-8) Including Fees - setup, AV, Internet, etc
- BANQUET SET-UP/DISPLAY AREA
- EXHIBITORS AND POSTER SESSIONS
- REGISTRATION AREA



- BOARD MEETING ROOM
- STORAGE ROOM
- EQUIPMENT RENTAL - POLICY ON AV EQUIPMENT, SERVICE CHARGES
- LARGE SUITE FOR PRESIDENT(COMPLIMENTARY)
- AVAILABILITY AND COST OF INTERNET ACCESS IN MEETING AND SLEEPING ROOMS
- PARKING FEES
- ABILITY TO BRING IN PROMOTIONAL ITEMS
- SHIPPING AHEAD - STORAGE FEES - TAXES - OVERHEAD
- LETTERS OF SUPPORT (ATTACHED)
- STATE ESP PRESIDENT
- STATE EXTENSION DIRECTOR
- OTHER

DISTANCE LEARNING:

- TECHNOLOGY AVAILABLE
- TECHNICAL STAFF
- ASSOCIATED COSTS

COMMUNITY ATTRACTIONS

POTENTIAL TOURS

SPECIFIC INKIND SUPPORT FROM THE STATE OR CHAPTER

- PEOPLE
- MONETARY
- OTHER

AVAILABILITY AT UNIVERSITY TO HANDLE REGISTRATION

- ANTICIPATED COST
- CREDIT CARD AVAILABILITY

## HOST CHAPTER(S) RESPONSIBILITIES FOR NATIONAL ESP CONFERENCE

The success of the National ESP Conference requires a good working relationship between the local arrangements committee, the National ESP Executive Director and the Professional Development Committee Chair.

The following list is intended to be a guideline for the host chapter. Each conference brings new opportunities and new challenges. The key to a successful conference is the ability of those involved to work together to adapt to situations that arise during the planning process.

1. Name a Local Arrangements Chair as soon as possible after the bid to host is accepted. The Local Arrangement Chair or their designee will serve as a member of the Conference Budget Committee. The budget committee will prepare the conference budget to be approved by the National ESP Board. The committee will also recommend a registration fee to the National ESP Board for approval.
2. The host state should plan to have a member on the Professional Development Committee for the year prior and the year in which the conference is held in the host state. This individual may choose to submit an application to be a regular member of the Professional Development Committee or may choose to serve as an ad hoc member of the committee.
3. The host state committee should make suggestions for the conference theme and potential keynote speakers. The final determination of theme and speakers will be approved by the Professional Development Committee and the National ESP Board. These recommendations should be submitted to the National Board no later than the Mid-Year Board Meeting in the Year the conference will be held.
4. Explore options for financial and in-kind conference support.
5. Coordinate with the Professional Development Committee to arrange off site tours and special activities, which will need to be included in the meeting schedule.
6. Coordinate arrangements with the host hotel for meeting rooms, etc. with the guidance of the National ESP Board and the National ESP Executive Director. The Local Arrangements Committee should make a least one on-site visit to the Hotel to meet with Hotel personnel well in advance of the conference. The Local Arrangements Chair is the principle individual to communicate with the Hotel management. This will be coordinated with the Conference Chair (Professional Development Committee Chair), the National ESP Executive Director and National President.
7. Arrange for the selection of menus for meals being provided at the conference. Also arrange for decorations at the meals. The meal and decoration arrangements must be approved by the Conference Budget Committee to insure that selections are within the budget.
8. Conference registration will either be handled by the ESP National Office or through the Host State where the conference will be held. The decision as to who does the registration will be mutually agreed upon by the ESP National ESP Board and the Local Arrangements committee. If the Local Arrangements Committee handles the registration then it will need to do the following steps. Arrange for a registration/conference management service locally (if available) that will provide the

maximum flexibility to include registration by Internet, mail or fax. The maximum flexibility in payment for registrations should also be considered to include; check, credit card and purchase orders. In 2010 80% of the registrations were made using a credit card, the rest were done with check or purchase order. Registration services should allow conference planners to track multiple registration options such as tours and special events. The registration should include printed confirmations, receipts, participant lists, name badges and tickets. All registration activities should be coordinated with the National ESP Executive Director and the Professional Development Committee Chair.

9. The host state should arrange for volunteers to assist with the registration process on-site. The registration table should be available for onsite registration the afternoon before the conference begins, all day on day 1 and at least in the morning for the remainder of the conference.
10. The host state should explore the possibility of including financial and accounting services as a part of the registration/conference management services. In many cases where a university can provide these services, a tax exemption can result in a substantial savings on the food and beverage costs of the conference.
11. Arrange for local media coverage of the National ESP Conference and of the keynote speakers.
12. Provide hosts for keynote speakers to pick them up airport and to make them feel welcome at the conference.
13. Provide access to the information and communication technology and the associated technical staff for distance learning activities related to the professional development program at the National ESP Conference.
14. Provide A-V equipment when feasible (check with hotel policy).
15. Conduct the Scholarship Auction or a similar fund raising event for the **National Epsilon Sigma Phi Development Fund**.
16. Make arrangements for local hospitality. A small cost for this can be included in the registration fee if requested.
17. Search out opportunities for special entertainment events, attractions, etc., for conference attendees and their guests. Provide information of these opportunities to attendees so they may plan for the open night or for a chapter to do a —States Night Out if scheduling allows.
18. Provide hospitality items such as signs as to locations of activities, local tourist information, greeters, ticket takers, decorations, etc.
19. Arrange for flags (US and State) at the opening session and National ESP Council meeting.
20. Arrange for color guard, signing of the national anthem, leading of Pledges of Allegiance and/or other appropriate flag ceremony at the opening general session.
21. Arrange for entertainment at the **Recognition Banquet**. The entertainment should be during the meal.
22. Local Arrangements Chair should meet face-to-face with the Professional Development Committee Chair at the National ESP Conference the year before the state actually hosts the event. The Professional Development Committee Chair is the overall Chair for the National ESP Conference.

23. The host state should view the National ESP Conference as a special professional development opportunity for the host state as well as surrounding states, and should promote maximum participation from state and regional Epsilon Sigma Phi members and non-members.
24. The host state will need to work with the Professional Development Committee to secure technology to be used in creating distance-learning opportunities for members who are unable to attend the meeting. Such distance-learning technologies as satellite uplinks or web streaming must be coordinated by the host state, as needed, to complement the conference program.
25. The host state should invite the National ESP Board to hold their mid-year meeting in the host state prior to the conference. This will provide an opportunity to meet with the Local Arrangements committee to foster a good working relationship with the board which is important to having a successful conference.
26. To encourage the promotion of the program by the host state through publicity and in the activities provided to attendees, the profits of the conference will be divided with 20% returning to the host state and 80% being retained by the National ESP Organization.
27. The host chapter should plan for between \$500 and \$1000 of expenses. Depending on the creativity of the host chapter many of these expenses can be in kind contributions or donations. The costs incurred would be items such as: table decorations at the awards banquet and Ruby Luncheon; printing of the conference program, Ruby Luncheon program and awards banquet program.
28. Plan a Life Member program during the National ESP Conference. A life member program could include tours, classes or workshops that would appeal to our life members.

### **HOST CHAPTER RESPONSIBILITIES FOR THE NATIONAL RECOGNITION BANQUET**

This activity should be coordinated closely with the National ESP Executive Director at the National Office.

1. Provide table decorations as part of Conference budget.
2. Order a floral piece for the head table. If chapters wish to honor recognition recipients with corsages/boutonnieres, it will be the responsibility of the chapter to cover this expense. The Local Arrangements Committee will provide the name of a local florist and help facilitate this process.
3. Invite local guests from the University and the Extension System of the host state(s). They are to be the guests of the hosts(s).
4. The Local Arrangements Committee will be responsible for the menu selection in consultation with the National ESP Office.
5. The National ESP Board supports the attendance of a photographer in exchange for taking of pictures at all conference functions including the Recognition Banquet. Digital copies of photographs will be available on the ESP website after the conference.
6. Banquet seating will be prepared by the National ESP Executive Director. The National Friends of Extension and National ESP Board plus guests will have

reserved seating. If at all possible, the president of the Chapter nominating the Friend of Extension recipients should be seated with the recipient.

7. Arrange for light entertainment during the meal.
8. The National ESP Executive Director and the National ESP Board will handle all of the details of preparing and presenting the plaques and certificates.
9. If the new officers are installed at the Banquet, the National ESP Board will handle the installation of the new board.

## Overview of Auction

### Auction Date and Time:

- Dinner: A cash bar will open at 6:00 pm with dinner served from 7:00 – 7:30 pm; door prizes drawn at 7:00 pm.
- Silent Auction: If facilities allow, viewing and bidding can be set up as early as the afternoon break to stimulate interest. Otherwise, the silent auction would run during the reception and dinner time. Bidding for the silent auction will end when the live auction begins.
- Live Auction: 7:30 to end. The payment for silent and live auction items sold **will run for 15 minutes after the auction is over or until 9 pm whichever comes first.**

### PROMOTE PARTICIPATION

- Items donated are requested to be valued at \$30 or more, and suggested to be something unique that represents your culture, community or geographic area, hobby or special interest.
- Auction promotion (including articles, invitations) is carried out through the ESP Connection newsletter, ESP website and communications with chapter leadership.

### ADVANCED SHIPMENT OF ITEMS

- Some items may be shipped in advance to local Extension office, as offered through promotions.

### ITEM REGISTRATION PROCESS

Auction registration will be held near the registration desk and conducted in the same location and within the designated time period as conference registration (although not for entire scheduled time period).

### Auction Donations Registration:

- Day 2 of Conference 4-7 pm
- Day 3 of Conference 7- noon
- Day 4 of Conference 8-10 am (deadline)

**Registration Information Needed** - to be obtained from donor on Auction Item Registration Form at time item is presented. This is a duplicate form that is to be completed by the donor.

- Name of item:
- Description:
- Estimated value:
- Donor (individual/association chapter) name:
- Donor contact information:
- Local contact information (hotel name and room number):

- Designated association to receive proceeds of sale: (Only relates to Galaxy years.)
- Log in number (to be entered by auction registration volunteer):

The donor will not make the determination as to whether an item will be placed in the silent or live auction.

The local arrangements chair will designate a storage place for auction items near the registration area. Table space is needed in the room for storing and organizing items prior to the auction.

## **PLACING OF ITEMS IN THE LIVE OR SILENT AUCTION**

The goal is to have 30-40 items in the Live Auction. These items should be the higher end pieces with broad appeal. All other items should go into the Silent Auction.

## **LOGISTICS OF ROOM LAYOUT/TABLE SET-UP**

Both silent and live auctions will be in the same room where the cash bar and dinner will be served. The room will be needed by 3:00 pm to set up for auctions –

## **ALL VOLUNTEERS AVAILABLE ARE NEEDED**

Room will be set up with tables for silent and live items, desk for registration of bidders, a payment station, and stage for the auctioneer.

## **PRESENTATION OF ITEMS**

Information to be presented on the cards to accompany silent and live auction items includes:

- Name of item:
- Description:
- Estimated value:
- Donor (individual/association chapter) name:
- Designated association to receive proceeds of sale: (Only important in Galaxy years)
- Log in number of item:

## **AUCTIONEERING**

Silent auction items will not be described by auctioneer or successful bid recipients announced by auctioneer.

Volunteers should review task assignments and see Auction Coordinator to review specific assignments during auction set-up at 3:00 pm.

## **PAYMENT FOR PURCHASED ITEMS**

Credit card capability will be provided. Credit card payment may be done via manual paperwork during the auction and processed subsequently or depending on the availability cards may be processed on site. Bob Ohlensehlen, National ESP Executive Director, will facilitate payments along with other volunteers and be responsible for

processing of payments (credit card accounts, personal checks, cash, receipts), and has offered to handle subsequent credit card processing of payments.

### **Silent and Live Auction Tasks and Schedule**

(Number of Volunteers will need to be increased during Galaxy Auctions)

Pre-Conference: Advance Shipment of Donations

Four Months Out: Provide article to National Office for the ESP Connection encouraging participation in the auction and address for advance shipping of items.

2 weeks prior: Receive/Register Advance Shipped Donations at Designated Extension Office.

### **Items Needed for Auction**

(Check with the National ESP Office to see what items are available from previous years)The following items are needed to conduct the auction:

1. Bidder paddles with numbers on them
2. Corresponding list of numbers to enter individual's name as the bidder
3. Carbonized sheets for silent auction bidding, registration of donations, and sales receipts
4. Calculators (3 minimum) for adding up sales receipts
5. Computer for keeping a database to include:
  - names of person(s) donating,
  - name of item(s)
  - estimated value of each item

Following the auction, the selling value will be entered into the database and provided to the national ESP office. Box of writing pens for the silent auction and the cashier's station.

### **Item Transportation**

Transport advanced shipped donations to Conference Hotel

### **Registration Desk – (2-3 Volunteers)**

Open during conference, in advance of Auction Event (especially times of high participant traffic.)

Greet donors and register donations at desk—need 2 volunteers per 2-3 hour time slot)

1. Task #1
  - assist donor in completing registration form and review for completeness complete tax statement form and provide to donor accept item, and hand over item and completed registration form to Task #2 volunteer



2. Task #2  
file original completed registration form in numeric order in folder, and turn folder over at end of shift attach the carbon copy of registration form to item attach a corresponding Log-In # tag to item
3. Task #3  
Place registered and tagged item onto cart and transport to storage room  
Preparation of Display Cards (2-3 Volunteers)  
Transfer registration information to display cards Determine placement of items in live or silent auction Organize display cards numerically for live and silent auction

### **During Auction Set-Up (day of the auction)**

ALL VOLUNTEERS ARE NEEDED

Auction Set-Up (4-6 volunteers)

- Transport items from storage room to location of auction  
Line tables with covering
- Using Velcro, attach silent auction and live auction display cards (pre-determined) on tables in designated areas
- Place auction items on tables to correspond with display cards
- Clip bid sheets to folders and place before each silent auction item

### **During Auction Event (Need approximately 20 volunteers)**

- 2-3 Greeters, 1 at each door—to move folks toward Bidder Sign-In Table
- 4 Bidder Sign-Up/Payment Assistants—to register bidders with Bidder #s, and ALSO to receive payments and provide receipts at designated table. Separate payment location for credit card and cash or check.
- Register bidders and hand out bidder paddle log-in sales data on main log complete receipt, tax statement, and provide both to buyer
- 3-5 Silent Auction Assistants Each Assistant will cover a designated area of items Monitor bidding process and answer questions At close of bidding for each of two rounds of silent auctioning, circle sale price and bidder #/name on each item bid sheet Monitor buyers' retrieving display card and bid sheet folder to take to payment desk, and retrieval of item
- 1 Auctioneer—to auction live items
- 2-3 Couriers—to carry each item and display card from live auction tables to stage for presentation, hand display card to auctioneer.
- Following sale of item, designated recorder will record bidder # and sale price on Display Card and on Registration Form. Courier will retrieve the item from the Auctioneer and the marked Display Card from Recorder, and hand the item and Display Card over to buyer.
- 1 Sales Recorder—records sale price and bidder # on both Display Card and Registration Form
- 1 Item presenter—to hold up item for display at start of bidding while standing on or in front of stage
- 4 Live Auction Spotters—catch bids in audience during live auction

- 2-4 People to prepare Bidder Settlement Sheet - collect all of the sheets for an individual bidder's purchases, transfer the amounts to a Buyers Settlement Sheet with all items purchased and the total amount of all items purchased to be provided for presentation to the cashier for payment.

## **ESP Conference Auction Procedure Notes**

### **As used for 2011 Conference (69 items, 108 bidder cards)**

This will describe the procedures and paperwork. The goal is to track all donated items by assigning them each a number (donors are tracked by this also) and track all bidders/buyers by a separate number and match those for collecting payment.

Certain people positions, paperwork or spreadsheet names/titles are underlined to note required items.

### **Receive Auction Items**

- Have a table next to the Conference Registration table staffed by one or two people during the Registration time periods to collect donations.
- Each donor must complete a Consignment Form that lists all items donated by that individual, chapter, committee, group or company. This form captures complete contact information for the donor and a description of the items donated. One carbon copy is given to the donor as a receipt when the item is received.
- Move donated item(s) to the storage room and keep the paperwork (consignment form) with the items. Be sure the descriptions are complete to identify items later.
- Input the information from the Consignment Form into a spreadsheet, called Auction Item/Donor Spreadsheet. Starting with "1", number each item consecutively on the first Consignment Form in order and enter all information into the spreadsheet. Continue the numbering through all Consignment Forms.
- This item number on the Consignment Form follows the item throughout the auction.
- Place Consignment Forms in a folder, maintaining numerical order. This information will be used to prepare items for the auction. Maintain this file throughout and following the auction for future reference.
- By placing the item information on a computer from the start, each item, donor and bidder can be tracked through to the end. After the auction, update this spreadsheet to include the purchase price and buyer information with the summation of the auction proceeds. A copy of the spreadsheet can be added to the auction file and organized/sorted by bidder to ease the checkout process.

### **Preparation of Items for Auction Sale**

- Items must be organized by Silent and Live Auction items. Suggestions for Live Auction items (approximately 25% to 30% of total items) include items with higher values, ones which might spark bidding interest – a fun item, special interest items, or unique silly items.

- B. Prepare a Bid Sheet for each Silent Auction item. The Bid Sheet includes the Item Number, Item Donor, Item Description, Estimated Value, Initial bid and required bidding interval, in whole dollars (ex: \$1, \$3 or \$5).
- C. The Silent Auction items should be displayed with their Bid Sheets and a few pens or pencils for bidders to use. Make sure that one or two people monitor the room when the room is open for viewing and bidding. They can wander throughout the room, answer any questions that anyone has and provide Live Auction items are set up for viewing separate from the Silent Auction items to spark interest. Live auction items are in the dining area where the auctioneer will work.
- D. For Live Auction items, create a Display Card (create on the computer from a template, then print) which transfers information from the Consignment Form or other donor information given for special items. The purpose is to provide the Auctioneer with the following information in eliciting bids:
  - E. Name of item
  - F. Name of donor
  - G. Donor's suggested value
  - H. Description of the item either from the donor or attach any information provided by the donor. Ask donors of large items or group of items to provide a list of all information.
  - I. Space for the item number (right side of Display Card)
  - J. Space for Buyer Bid Card number (right side of Display card)
  - K. Space for Purchase Price (right side of Display Card)

### **Registration of and Distribution of Bid Cards**

- A. Two part numbered Bid Cards are used. During bidder number registration, have two people available to hand out and collect cards as bidders complete them, with a third person inputting the information into a computer spreadsheet, called the Bid Card Spreadsheet. Because contact information is available from conference registration material, only hotel room and cell phone number may be necessary. This information is necessary in case the winning bidder is not present at the end of the auction and needs to be contacted at the conference to pay for and pick up their item(s).
- B. The spreadsheet containing bid card numbers is used to identify the successful bidders/buyers at the end of the auction. Buyers are matched to their purchases.

### **Silent Auction Paperwork**

The Bid Sheet is displayed with the item. When the silent auction ends, an auction staff person(s) quickly circles the highest bid with a pen and pulls off the top copy of the form. The top copy is carried to the Sales Table (Station One) for processing. The carbon copy of the Bid Sheet stays with the Item.

### **Live Auction Paperwork**

A Display Card is prepared and placed with the Live Auction item on display (as mentioned above).

A Sales Clerk (a team of two is suggested in case one wants to bid or as a double check on the information being recorded) sits near the Auctioneer and records the Item Number, Buyer Number and Purchase Price for each item on a Sales Clerk Sheet as the item is sold. A brief description (couple words) is added to help differentiate items.

During the auction, the Display Card is taken with the item to the Auctioneer. A helper then carries the item around the room while the auctioneer uses the Display Card to entice bidders. After the sale of the item, a helper picks up the Display Card from the Auctioneer and gives it to the Sales Clerk who records the Buyer Number and the purchase price on it. A helper then carries the Display Card to the Sales Table. Two people can handle the Sales Clerk function to back each other up in recording sales information. (Display card -> Auctioneer->Sales Clerk->Sales Table)

### **Auction Purchases Processing**

1. After the Silent Auction, two persons set up at a Sales Table (Station One) to process the forms. One person sorts the Silent Auction sheets by the winning bidder number. The second person prepares the Sales Receipt for each winning bidder by listing all items "won" by that bidder. Names can be matched to Bidder Numbers from the Bid Card Spreadsheet. The computer operator then goes to the Consignment Spreadsheet to enter the Buyer Name and Purchase Price for that item. After the Auction, the buyer picks up this form to carry to the Payment Table (Station Two)
2. During and after the Live Auction, the above process continues as a helper brings Display Cards to the Sales Table to be processed. The first person puts the Display Cards in numerical order (by the item number) for the computer operator. Buyer names are found, the Sales Receipt completed and buyers pick up their Sales Receipt containing successful bid items from both Silent and Live auctions. Use paper clips to attach Bid Sheets and/or Display Cards to the Sales Receipt.
3. Suggestion: A third or fourth person could be helpful during this process to answer questions and interact with people coming over to find out if they were successful in their bids and hand buyers their Sales Receipts. Keep buyers away from the persons doing the processing of the paperwork so they can work without interruptions.

### **Payment Table**

1. The buyer picks up his/her Sales Receipt at the Sales Table and carries it to the Payment Table (run by the ESP Board) to make payment in cash, by check or by credit card (VISA or MC).

All items are checked to see if they have been paid for and picked up. Cross check paperwork as needed. Mistakes can delay closing the auction so all should be double-checked. Everyone should be advised to double-check themselves as they handle paperwork.

The ESP National Office has the forms used in this auction. The Display Card template and spreadsheets are available.

## **HOST CHAPTER RESPONSIBILITIES FOR THE DEVELOPMENT FUND AUCTION**

Fund raising for a valued cause and fun are a great match. The manner in which this auction is conducted should create an atmosphere of fun and goodwill and generate significant funds to finance the scholarship program of the Epsilon Sigma Phi National Development Fund.

1. Appoint a chairperson from the host chapter(s) or from a chapter willing to accept the responsibility to manage the Scholarship Auction.
2. The auction chairperson should begin contacting state chapter presidents early in the year to solicit items to be donated by Chapters and/or members.
3. The host chapter will conduct the auction. They may elect to stage a hospitality event in conjunction with the auction. Arrange for a cash bar.
4. Conducting the auction offers opportunity to involve the JCEP partner organizations in the host state.
5. Arrange for auctioneers (professional or professional —wanta-bees). The more the auctioneers know about the organization and its members, the more fun the —chatter is likely to be. The host state should try to secure an auctioneer(s) as a local in-kind contribution. If that is not possible, anticipated expenses should be included in the budget.
6. Donated items will be placed in the silent or the live auction. This determination is made by the host chapter chair. The goal is to have about 30-40 quality items in the live auction. It is helpful to have the silent auction items displayed by mid-afternoon on the day of the auction. Items for the live auction should be displayed during the reception and meal time.
7. The host chapter should plan to accept the items, catalog the items including who donated the item, the value of the item.
8. During the auction the host chapter should plan to collect information that includes the sale price of the item, who purchased the item and provide buyers with an itemized duplicate sales receipt that contains all items purchased and is totaled for presentation to the cashier for collection of payment for items purchased.
9. The host chapter should provide the tellers, ring personnel to catch bids, bidder number sign-up and collect the revenue immediately following the sale.
10. When possible use as many different options for payment as possible such as: cash, check or credit card. (The National ESP Board has entered into an agreement which has made the use of a credit card available to be used at the discretion of the National ESP Board for such uses). Generally if prior arrangements are made the Resource Development Committee will be responsible to collect money from the sales and make the necessary deposits of money collected.

### **Budget Worksheet for National ESP Conference**

Budget categories are generic and can be expanded to fit individual conference needs. It is suggested that the categories be transferred that the categories be put into an Excel worksheet file. The National Office has developed a worksheet that works quite well to develop a budget. Revenue items will need to reflect three levels of payment –

early-bird; regular; and on-site. The budget should be in the final stage or close to it for approval by the National Board no later than April 1st.

Revenue  
Full Registrations  
Extension Employee Non-Member  
One Day  
National Office Registrations  
Retiree Rebate  
Extra Meals:  
Guest Packages  
Special Event  
Ruby DSA  
Auction Buffet  
Recognition Banquet  
Total from Registration  
Tours (List)  
Grand Total Revenue

Expenses:  
Speakers/Personnel (List)  
Auctioneer  
Conference Expenses  
Registration  
Web-streaming  
Printing  
AV Rental  
Hospitality  
Cancellation Insurance  
Table Decorations  
Pre-Conference Tours  
Concurrent Session Presenters  
Site Visit from Board  
Meals/Entertainment

Day 1 Board  
Breakfast  
Board Lunch

Day 2  
Breakfast  
Lunch/Poster Viewing  
Beverage Break  
Special Event

Day 3  
Breakfast

Beverage Break  
Ruby Luncheon  
Beverage Break  
Reception  
Cash Bar (Bartender)  
Auction Buffet

Day 4  
Breakfast  
Beverage Break  
Recognition Reception  
Cash Bar (Bartender)  
Recognition Banquet

Day 5  
Board Breakfast  
Grand Total Expenses