**`NATIONAL FEDERATION OF THE BLIND OF NEW YORK STATE**

**ANNUAL STATE CONVENTION ADMINISTRATIVE TASKS**

INTRODUCTION

* Use the following folder to file any documents related to the 2022 convention: NFB Office > NFB Work > Conventions > State > 2022 Buffalo Convention.
* A folder of a sampling of documents from the 2017, 2018, and 2019 state conventions is in the 2022 Buffalo Convention folder in a sub-folder named **Sample State Convention Docs for Transition 2022**. These documents can be used as models or templates.
* All documents created and used for the State Convention should be placed on affiliate letterhead unless otherwise directed by the Affiliate President.
* Some of the duties listed below as being performed by the President may be performed by a Convention Coordinator if one is assigned. Not all the President’s convention related duties are listed here.
* Duties presented below as instructions are either to be performed by the administrative assistant or by a member volunteer, as determined by the President.

SPONSORSHIPS

* Start with the **Potential Sponsors List**. Consult with the Affiliate President for possible input, such as new potential sponsors or comments on previous sponsors.
* Contact potential sponsors via telephone to update their information. An updated list should be created with current contact information.
* Follow up each phone call by emailing a **Sponsor Invitation Letter**. The 2018 or 2019 version can be used as a model. It includes various sponsorship levels, but the current details may be quite different from the 2019 details. Again, consult with the President.
* Follow up phone calls and emails as needed to make sure a response is received from each entity.
* Keep track of all such contacts by date and result. You may want to use the spreadsheet **Sponsor Commitments 2019** as a model.
* Email an updated **Sponsor Information Form** (with information provided by the President) to each entity that has made a verbal or written commitment to sponsor the convention. (This form may be changed to an online form in the future.)
* For each completed sponsor information form received:
	+ Enter all information on a spreadsheet like **Sponsor Payments 2017**. This may seem redundant, but the data entered will be different from that on the Sponsor Commitments document.
	+ Create an **Invoice** based on the information provided in the form. The sponsorship level determines whether any other costs are included in the sponsor donation or must be invoiced. Both a blank invoice and a sample invoice are provided.
	+ Email the invoice to the sponsor.
	+ Also send by email to the sponsor a **Request for Sponsor Ad**. The size of the ad mentioned in the request depends on the level of sponsorship.
	+ File both the information form and the invoice in electronic folders you create. Make sure to include the sponsor’s name in the file name you create.
	+ Use your tracking document (Sponsor Commitment Form) to make note of receiving the information form.
	+ Use the same document to make note of the amount due.
	+ Make note of products to be exhibited by each sponsor, as shown on the sponsor’s information form, in a **List of Exhibitor Products**. This will help those affiliate members who set up the exhibit hall.
	+ Create a list of sponsor representatives who will be attending.
* In conjunction with the affiliate treasurer or bookkeeper, note payments received from the sponsors in your tracking document.
* Make sure all sponsor ads are received by the due date. Follow up as needed.
* Keep all sponsor ads in a folder. Name each ad with both the sponsor’s name and the size of the ad.
* Email all sponsor ads to the printer, along with size information and page placement. (Page placement within the convention agenda partly depends on the sponsorship level. Half-page and quarter-page ads should be combined on pages as will fit. Consult with the President before sending ads to the printer.
* As the date of the convention approaches, send a reminder to any sponsor for whom payment has not been received.
* Create a printed label for each entity that will be exhibiting products and/or services at the convention. For those entitled to two tables, create two labels.
* In the past, we have allowed companies to purchase exhibit space without becoming sponsors. Consult with the President for the current policy. If non-sponsor exhibitors will be allowed, you may want to use the **Exhibitor Information form** and **Exhibitor Invoice**.

ATTENDEES

* People wishing to attend will fill out a **Registration Form**, either on the Affiliate website or by mail.
* Suggestion for this year (consult with the President): include in the registration form a question as to what form of agenda they plan to use, Braille, print, or electronic. This will help the affiliate to come up with an estimated count of how many Braille and print agendas to produce.
* Those registering online will remit payment by PayPal. Those registering by mail will send a check or money order along with their registration form.
* The Affiliate Treasurer or the bookkeeper will handle and keep track of all payments.
* The administrative assistant will make note of all registration details and remittances on a spreadsheet, as in **Registrant Payments 2017.** I suggest reviewing this document before creating a new one for the current year. Addition on the 2017 doc is done by Sum formula for each column requiring a total. The Sponsor Payments and Registrant Payments spreadsheets can be created as separate sheets in a single Convention Payments document.
* Communicate with registrants as needed.
* Registrants will include scholarship winners, whose expenses will be paid by the affiliate. Scholarship winners must also provide the information collected on the Registration Form, and this information will be entered on the Registrant Payments spreadsheet. Registrants may also include speakers.
* For each individual or family registering, the administrative assistant will note the following on the outside of a small envelope: registrant’s name(s), quantity of Friday and Saturday lunch tickets needed, and quantity for each banquet meal choice. Also note if any monies are due at the convention.
* Closer to the time of the convention, create meal tickets, using index cards or the like, with each meal ticket labeled in print (by hand or computer printer) with the name of the meal (Friday lunch, Saturday lunch, [banquet] Chicken, etc.). An admin assistant who does not know Braille will work with someone who will Braille the tickets and envelopes with the same information as printed.
* Using the notations you have made on the outside of each envelope, place the appropriate meal tickets inside.
* Provide the President or other officer with totals as requested (number of hotel rooms, meals, etc.). Provide the hotel with a detailed guest list and meal requirements, if directed by the President to do so. These totals will include data from both the Sponsor Payments and Registrant Payments spreadsheets.
* Generate a list of registrants who will be eligible for door prizes and email it to the convention host. (Consult with the President to ascertain whether sponsor attendees should be included.)

GENERAL

* The Affiliate President maintains communication with the convention hotel. The administrative assistant will perform any hotel communication duties as required by the President.
* Some weeks ahead of the convention date, the Affiliate President creates a Convention Letter announcing the event and inviting people to attend. The administrative assistant may be involved in distributing this letter by email and/or postal mail, as directed by the President. For postal mail, the President will have copies made by a printing agency and given to the administrative assistant.
* In the past we have obtained a batch of mailing labels, from NFB National office, of people with New York State addresses. If this is done, the labels must be sorted to eliminate repeats, incomplete addresses, and blanks. Then the labels are placed on “Free Matter for the Blind” envelopes with the Affiliate return address printed, the invitation letters are folded and placed inside, the back of the envelope is tucked in (not sealed), and the envelopes are placed in the mail.
* The Newsline Director may send the Convention Letter by email to subscribers and to the Newsline database of agencies.
* The Newsline Director will also add an announcement about the convention to the Newsline Local Channel.
* Consult with the President about volunteers. In the past, the office has obtained volunteers from JW.com, the Jehovah’s Witnesses organization, and the office has established communication with this organization to facilitate the provision of volunteers. The President may want to use a different, or an additional organization.
* Consult with the President about daycare. Once we have an estimate of the number of children needing daycare, we will contact an agency to provide this, possibly the agency we have used in the past. This may or may not be the duty of the administrative assistant. A written contract will be provided by the agency.
* The Affiliate President invites speakers to attend the convention and make presentations and maintains communications with them. The President or the administrative assistant will ascertain the guest room and meal needs and choices of any speaker who expects to need these services. The administrative assistant will keep this data on the Payments spreadsheet in order to include it in our counts for meals and hotel rooms.
* The Affiliate President creates a written convention Agenda to be uploaded to the affiliate website, as well as to be printed and Brailled for distribution at the convention. Attendees and potential attendees may ask questions about the agenda prior to the date of the convention and should be directed to the online document. Many attendees will download the agenda to their devices for use during the time of the convention.
* Make travel arrangements for scholarship winners, as needed. Consult with the Scholarship Chair or Affiliate President for instructions. You will need the traveler’s name, address, phone number, email address, and age. Some transit companies offer a discount for blind travelers; in such cases make sure to register the traveler as blind. Once the arrangements have been made, notify the traveler of the arrangements, and make sure they receive tickets via email.
* Someone in the affiliate will be in charge of collecting door prizes, and someone will be in charge of obtaining donated items to be auctioned. The administrative assistant may be involved in creating a list of items for each of these categories. You may be asked to create an **Auction Bid Sheet**, but since the collectors of the bids will probably be blind, it will be better for the bids to be registered electronically or in Braille.
* Print and cut up **Horse Race Tickets** if required by the President. (This is a recreational event held at the convention.)
* A list of items to be Brailled is provided in the collection of convention documents. The administrative assistant may be involved in making sure the electronic files of these documents are sent to the person doing the Brailling.
* Make a list of all items you must bring to the convention! This will include Payment spreadsheets printed out from the files, registrant envelopes, office supplies, notebook, locked box, table labels, and other items. Pack these items securely for transporting them.

POSSIBLE DUTIES AT THE CONVENTION

* Help set up the exhibit hall.
* Know the layout of the convention hall, including location of water stations, auction item table, and sound system. Know the location of the hotel lobby and registration desk, the convention hall, the exhibit hall, the convention registration area, the convention area restrooms, the hotel restaurant, the daycare room, the affiliate’s storage room, and the guest rooms.
* Welcome and register attendees as they arrive. In the past, this job has involved at least two people. It includes giving each attendee their respective packet of meal tickets and a print or Braille agenda (if needed); making note on the spreadsheet of attendees that the person has checked in; and collecting any monies due, as noted on both the spreadsheets and the registrant envelopes. Keep all such money in the locked box.
* Note: sometimes a person shows up who has not registered. Enter their name and other data by hand on your spreadsheet and collect the required payment. If they intend to spend the night at the hotel, consult an affiliate officer for advice as to how to handle this.
* Work with the volunteers to make sure they know their duties, which is mainly to act as directional guides. Someone in the affiliate will make sure volunteers know the best way to provide directional guidance to a blind person using a dog or a cane.
* Act as an additional directional guide.
* Be ready to perform any duties as requested by an affiliate officer (President, Vice President, Secretary, or Treasurer).
* Attend sessions of the convention when not performing duties outside the convention hall.
* Attend the banquet.
* Keep written track of all pledges and donations received at the convention. Collect any cash or check donations and keep in the locked box.
* Make note of auction winners and amount of their bids. Collect any cash or check payments and keep in the locked box.

AFTER THE CONVENTION

* Use your notes from the convention to create a computer document of **Pledges and Donations Received** and another document of Auction Winners with items won and winning bid amounts. Both documents will show amounts collected and amounts yet to be paid. Email these documents to the President and the Treasurer.
* Make a thorough and detailed accounting, with written documentation, of all monies collected at the convention, listed by category, and noting whether cash or check. Submit this list by email to the President and the Treasurer. Facilitate depositing this money in the appropriate affiliate bank account.
* Work with the Treasurer to identify and notate the purpose of each PayPal payment made at the convention.
* Keep in touch with the Treasurer as monies owed from the convention are received.
* Send every sponsor a **Sponsor Thanks letter**, signed by the President or the Convention
* Use the **Thanks to Member Pledge Donor** to create a thank you letter to all individuals who donated money at the convention. Send these by email or postal mail, as decided by the President.
* After a time determined by the President, create invoices for amounts still due and email them to the parties in question.