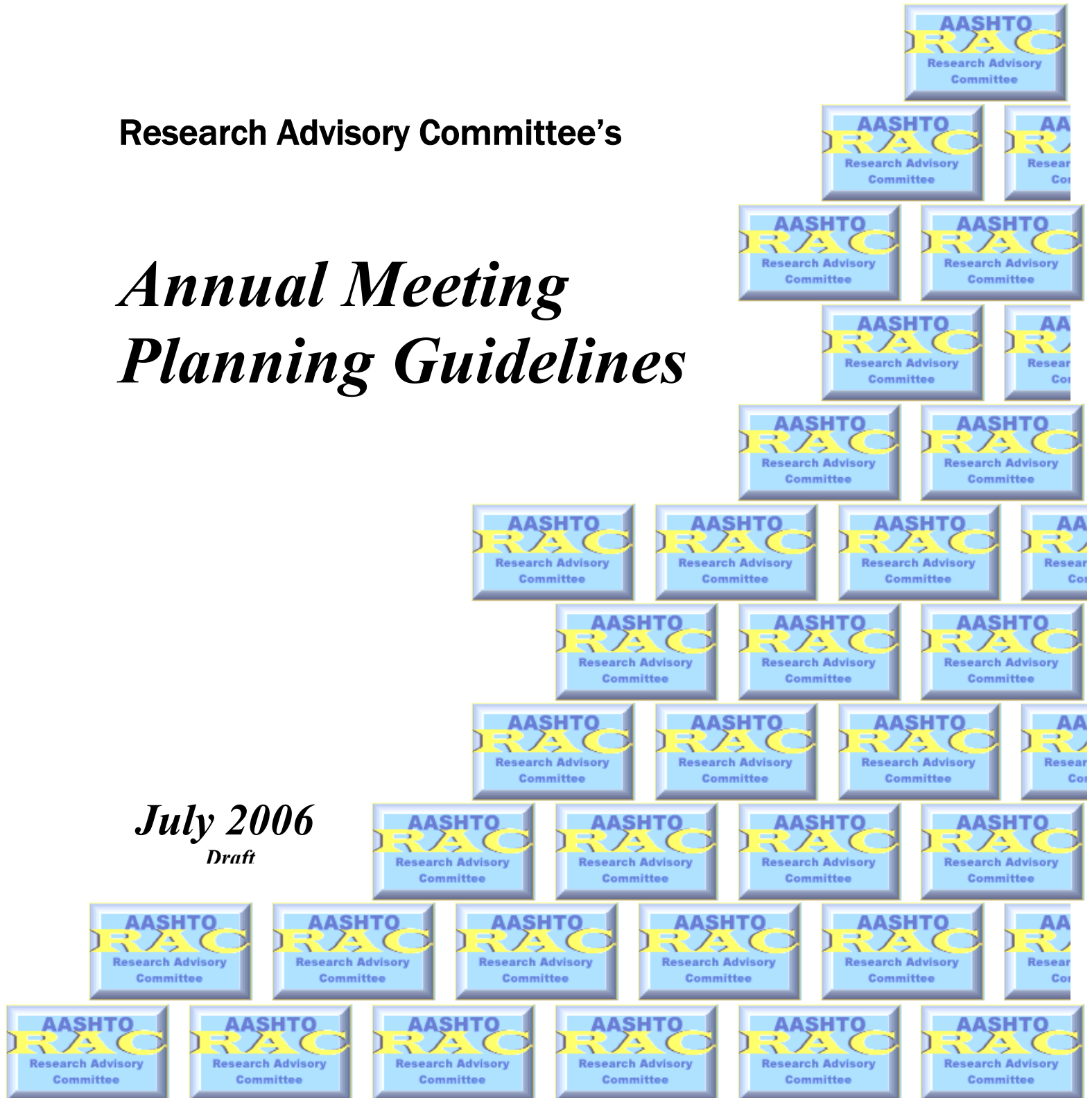




Research Advisory Committee's

# *Annual Meeting Planning Guidelines*

*July 2006*  
*Draft*



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## **FORWARD**

If you've never planned a large meeting you might be surprised by how much time it takes to handle all of the administrative and clerical tasks that need to be done. It can seem overwhelming at first, particularly if you don't even know where to start. When I agreed to host the 2006 annual meeting I was definitely a neophyte. I had a lot of ideas, but what I really wanted was a template to use for putting those ideas into action. After doing a little research and consulting with several RAC members I was surprised to discover that we had very little documentation on how to host a national RAC meeting. I decided to develop the following guidelines to assist future host states and regions with organizing and executing a successful annual meeting. It is my hope that they will supplement and edit this document each year to reflect personal planning experiences. It is also my hope that this will encourage more states to volunteer to host future meetings by giving them a clear understanding of the planning process and a detailed template for how to proceed.

I'd like to thank Dave Lippert, Illinois DOT; Moy Biswas, North Carolina DOT; Skip Paul, Louisiana DOT; Jim Simes, Connecticut DOT; Sandra Larson, Iowa DOT; and Mara Campbell, Missouri DOT for their contributions to this document and all the individuals who have hosted annual and regional meetings that set the standard for the rest of us to exceed.

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## **INTRODUCTION**

The American Association of State Highway and Transportation Officials (AASHTO) is a nonprofit, nonpartisan association representing highway and transportation departments in the 50 states, the District of Columbia and Puerto Rico. It represents all five transportation modes: air, highways, public transportation, rail and water. Its primary goal is to foster the development, operation and maintenance of an integrated national transportation system. Much of AASHTO's work is done by committees comprised of member department personnel who serve voluntarily. The Association provides a forum for consideration of transportation issues, and is frequently called upon by Congress to conduct surveys, provide data and testify on transportation legislation.

The Research Advisory Committee (RAC) provides overall transportation advice to the Standing Committee on Research (SCOR) and the AASHTO Executive and Policy Committees. RAC helps SCOR accomplish its goals by providing assistance in identifying research needs, defining research emphasis areas, utilizing research findings, maintaining an overview of State-related research activities and funding, and employing the National Cooperative Highway Research Program (NCHRP) effectively.

The RAC annual meeting provides an opportunity for the committee to conduct its annual business meeting and to network with others interested in transportation research. The meeting attendees are typically comprised of transportation professionals from state DOTs, federal highway agencies, research institutes, and universities.

## **1-GET STARTED**

The best way to get started is with a clear understanding of the responsibilities of everyone involved in the planning process. A general list of responsibilities is provided below for quick reference. Details on how to fulfill these responsibilities are provided in the subsequent sections of these guidelines.



### **1.1 Planning Responsibilities At-A-Glance**

#### **RAC Officers' Responsibilities**

- Provide Guidance to Host Region and Host State

#### **Host Region (General Responsibilities)**

- Select meeting city in the region
- Identify Meeting Planning Coordinator from Host State
- Track progress on schedule
- Provide verbal reports to RAC Officers via conference calls
- Establish Program Committee
- Coordinate between other committee chairs

#### **Host State/Meeting Coordinator (Logistics Responsibilities)**

- Coordinate with Regional Officers
- Select meeting venue/hotel after conducting site visits
- Provide transportation to events that are included in the registration fee
- Negotiate and sign contracts with hotel and vendors/suppliers
- Select meeting date
- Estimate number of attendees
- Calculate “break-even” number of attendees (approximate costs)
- Prepare budget and set registration fees (attendees, spouses, guests)
- Select food/refreshments/socials
- Arrange A/V
- Create invitation lists
- Develop and distribute announcements (e-mail & website)
- Develop preliminary promotional materials
- Publish and distribute final copy of all promotional literature for the meeting
- Identify transportation options from and to the airport
- Provide meeting signage

#### **Host State/Meeting Coordinator (Other Responsibilities)**

- Recruit and train meeting staff/volunteers
- Process all attendee registrations, collect fees, and pay meeting bills
- Track prepaid and on-site registrations
- Provide list of participants
- Assist in obtaining keynote speaker(s) for the general sessions

- Coordinate all arrangements with exhibitors and communicate all rules and regulations pertaining to exhibitors (if appropriate)
- Rules for the region table
- Provide a spouse/guest program (if appropriate)
- Provide nametags and speaker name tents
- Print meeting programs
- Provide registration packets & promotional items (if appropriate)
- Solicit meeting feedback (e.g. evaluation forms & surveys)
- Collect and summarize meeting feedback
- Coordinate up-to-date head count for food
- Provide tickets for meals & other outings (if appropriate)
- Advise overflow that they cannot attend or develop wait-list if capacity is exceeded
- Manage meeting crises
- Region table set up
- A daily newsletter (1-pager), which highlights the news of the meeting

#### **Program Committee Responsibilities**

- Develop meeting theme
- Schedule monthly conference calls; coordinate to ensure updates are ready for monthly RAC officers' calls
- Develop session topics
- Secure and coordinate session planners and moderators
- Confirm speakers
- Identify vendors (if appropriate)
- Set agenda
- Coordinate handouts

#### **Session Planner Responsibilities**

- Secure session speakers who are knowledgeable and engaging presenters
- Review presentations to ensure quality, continuity and eliminate duplication of remarks
- Confirm date/time/location with speakers and provide information for registration
- Establish session format (panel, town hall, individual speakers, etc.)
- Provide instructions to speakers and the session moderator regarding topic, length of presentation, format, etc.
- Collect all session planning forms from speakers and submit to meeting coordinator
- Obtain speaker & moderator bios for introductions

#### **Session Moderator Responsibilities**

- Introduce speakers – (keep these short; refer to detailed bios in the program)
- Start session on time and keep speakers on track
- Check to see that speakers' presentations are loaded and working properly prior to session
- Help distribute handouts if necessary
- Orchestrate audience Q&A; be prepared with a few questions to start the process if necessary
- Identify a note taker

## **1.2 Establish a Planning Committee**

An effective way to plan a large meeting when you have an all-volunteer group is to work through committees. Establishing productive committees involves picking capable, responsible and motivated people to do the work and then regularly communicating with them to ensure goals are being met. Using committees not only helps distribute the workload, but it also ensures that the meeting will reflect the needs and desires of more than just one individual.

Try to keep your committees to a manageable size. Making decisions with too many people can be difficult. Having too few volunteers can also be problematic, especially if they do not follow through with their commitments. Look for people who work well together and can make decisions by consensus.

The host state typically handles the logistics of the meeting, while others in the host region may take the lead in developing the program.

Keep RAC national officers informed and involved.

## **1.3 Identify a Meeting Coordinator**

Having a competent person serve as coordinator is vital to the success of the meeting because the coordinator is involved in every aspect of planning and executing the meeting. Look for a person who:

- Possesses good organization and communication skills.
- Is creative and has an eye for details.
- Can function well under pressure.
- Can effectively delegate.
- Has a good sense of humor. This will help the committee “manage the unexpected.”

The most common practice is for the RAC member from the host state to serve as the coordinator. However, since coordinating a large meeting can be a full-time job, hiring an experienced coordinator may be a good alternative for states that do not have the time, desire, or internal resources to handle all of the details.

## **1.4 Select Meeting Management Tools**

Some sort of management system is essential to keep everything on track. In most cases, a simple merge database will suffice for mailings, meeting lists, generating name tags, etc. For income and expenses, you may need a spreadsheet program. And unless you have in-house experts who can prepare your program, brochures, and websites, you may want to brush up on your favorite word processing, desktop publishing, and webpage development programs.

A portable file system with clearly labeled folders will help keep all of your working documents organized and easily accessible, particularly when attending meetings. It is also a convenient way to transfer documents to the host state that will plan the next national meeting.

## **1.5 Set a Date**

The national meeting was formerly a biennial summer event held in even numbered years. Regional summer meetings were held in the odd numbered years. However, in an effort to reduce costs and improve efficiency, the decision was made to host an annual national meeting that also provided time for regional breakout meetings starting in 2004. This was initially done on a trial basis, but was finalized in 2006.

Each region takes turns hosting this meeting, which is generally held during the first full week after the July 4 holiday, but can be adjusted due to hotel availability and other established meeting dates that might draw a large portion of the expected attendees.

### **Previous National Meetings**

2006 Region 3 – Columbus, OH July 10-13, 2006  
2005 Region 2 – Wilmington, NC August 1-4, 2005  
2004 Region 1 – Mystic, CT July 18-22, 2004  
2002 Region 4 – Kalispell, MT July 14-17, 2002

Try to avoid scheduling past the first full week of August since this is when many schools start back in session.

Allow at least 12 months to organize the meeting. This should give you enough time to handle all of the planning and administrative tasks and address any glitches or setbacks prior to the meeting.

Keep in mind that all hotels have **peak** periods of high demand, **value** periods of low demand and **shoulder** periods of variable demand. If you consider dates during a peak period you may need additional lead time (at least 6 months) to get what you want at an acceptable price. If you select a date within the hotel's value or shoulder period, you may be able to negotiate a lower cost for sleeping rooms. Also many hotels like to split the week into three time slots: Sunday-Wednesday, Wednesday-Friday, and Friday-Sunday. Planning the meeting within one of these slots may also enable you to negotiate a reduced rate.

Check with AASHTO, TRB and FHWA for possible conflicts with your preferred dates as well as your local DOT, particularly if you want your CEO to participate.

## **1.6 Select the Meeting Venue**

Most likely the meeting will be held at a hotel with conference facilities. The hotel should be able to accommodate all attendees, meetings, and exhibitors/vendors, if applicable.

Try to select a hotel that is conveniently located near a major airport and within walking distance of restaurants and perhaps some local attractions.

- A **downtown hotel** in a large city with downtown attractions is a good choice when attendees are in meetings most of the day but have large blocks of personal time around lunch or in the evening.



- **Suburban hotels** usually provide convenient parking at no charge and are often situated near local attractions. These hotels work especially well when many conferees will be driving to the meeting, but are also good choices for those traveling by air if convenient transportation to and from the airport is available.
- **Resort properties and casinos** often have excellent meeting facilities; however, many state DOT's refuse to consider these locations because they appear to be more suited to fun and recreation than serious meetings. Even though these properties can provide great bargains during off-season or shoulder periods, you should avoid them altogether since a significant portion of your target audience would have difficulty attending.

### **1.6.1 Meeting History Data and Fact Sheets**

With the data on past meetings as a guideline, draw up a fact sheet of anticipated meeting requirements. The fact sheet should include:

- Preferred meeting dates (first, second, and third choices).
- Number of sleeping rooms needed (Include suites and any requirements for multiple occupancy.)
- Meeting room requirements (number, size, and duration of use).
- Estimated food and beverage requirements.
- Audience profile (engineers, researchers, government officials, etc.)
- How facilities should submit bids (include contact person, agency, address, and phone and fax numbers).
- When decisions will be reached (indicate whether site visits are required).
- Meeting history data.

Fact sheets are incredible time savers; without them, you can spend hours on the phone reciting the same information to different hotel sales representatives. You can mail or e-mail fact sheets directly to each hotel and/or meeting facility. This method works well only if you already know which facilities can accommodate your needs. Otherwise, you will be wasting energy on facilities that cannot compete for your business. Another alternative is to take the fact sheet with you to your site inspection visit. This will help the sales representative identify the most appropriate spaces to meet your needs.

(See **Appendix A** for a sample history and fact sheets.)

### **1.6.2 Site Visits**

Visit the hotels under consideration prior to making the final selection. Site inspections offer the opportunity to walk through a property and examine it for cleanliness and maintenance, but they also give you an opportunity to meet the property managers, see the staff in action, and get a feel for the ambiance of the facility. In addition site inspections can help build a relationship between the coordinator and the staff of the hotel or meeting facility, which increases the likelihood that the meeting will function well at the facility and decreases the likelihood of miscommunication or misunderstandings.

As you begin your tour of a property, you can expect to receive a packet from the sales representative containing details such as room capacities; the number of singles, doubles, and suites; the property's floor plan; and banquet options and menus. You should also prepare your own checklist of items you want to review and questions you want to ask. Be sure to assess the qualities that may not be explicitly stated in the information packet. Are the rooms bright or dim, noisy or quiet, warm or cold, fresh smelling or musty? Can you move easily and comfortably from room to room? Is the staff helpful, friendly, well-groomed, professional and courteous?

The facility should be handicap accessible. This not only includes access to sleeping rooms and hotel facilities, but also the ability to accommodate special audio and visual needs, etc. (See **Appendix B** for a sample hotel walk-thru checklist.)

### **1.6.3 Request for Proposals (RFP)**

You may need to issue a Request for Proposals (RFP) to procure hotel services. Verify the requirements with your DOT prior to meeting with any of the hotels you wish to consider. (See **Appendix C** for a sample RFP.)

### **1.6.4 Negotiating Agreements and Contracts**

It is important that you know which individuals in your organization have the authority to enter into a contract with a hotel or meeting facility. Once an agreement is signed, it may be binding even if you do not have the authority to sign it. Check with your legal counsel before you sign anything! It's a good idea to have them review all contracts during the negotiation process to ensure all state and federal laws are followed.

Negotiations frequently involve a series of inquiries and conversations with the hotel before an agreement can be reached. This process may take several days or several weeks. The bottom line in negotiating is that the hotel needs to make a profit on your business and you need to pay a reasonable price for the services you are buying. With this in mind, pretty much everything is negotiable, except for the things that are not permitted by your state's laws.

Comparative shopping will help. Know what you want and find out what the competitive price is for it. Also, keep your budget in mind.

Negotiations should be viewed as a collaborative effort among professionals. Neither party should regard their relationship with the other as adversarial.

Hotels are generally secured with a letter of agreement or hotel contract.

The contract with the hotel should include:

- Inclusive dates of meeting
- Number of guest rooms blocked each day (Be sure to include the day before the conference in the block of dates.)
- Room rates
- Suites reserved and furnished
- Complimentary rooms
- Meeting, function and exhibit space (with names of rooms and pricing)
- Number of meals, receptions, breaks and estimated pricing
- Special arrangements (e.g. shipping and receiving of packages, parking, storage areas, contract addenda required by your state, etc.)

(See **Appendix D** for a sample hotel contract.)

(See **Appendix E** for detailed guidance on negotiating agreements and contracts and a list of common terms used in these documents.)

### **1.6.5 Food**

Many hotels will provide complimentary meeting space when enough meals are purchased and enough sleeping rooms are blocked. Since the costs for sleeping rooms are covered by the individual meeting attendees, the single biggest hotel expense you will need to include in your budget will most likely be for food and beverages. Don't forget to include service charges in the budget.

Your food selections typically will be itemized on a **Banquet Event Order (BEO)**.

Negotiate food services in such a way that you are not liable for food costs beyond what you can cover through registration fees. Usually they will allow up to 10% more people than you contract for (e.g., for late registrations), but be sure this is clear up front.

Plan for special dietary needs (diabetic, vegetarian, low sodium, food allergies, etc.). Many people avoid pork for religious reasons, so if you include this on the menu, be sure to provide another option.

Ask attendees to identify any dietary restrictions. Provide healthy food alternatives during breaks as well as during the meals.

Consider doing a "tasting" before finalizing the menu, particularly if you are unfamiliar with the facility.

Provide attendees with a list of local restaurants. Consider organizing the list by type of food, cost and proximity to the hotel. Provide phone numbers, addresses and sample menus, when available. Maps from the meeting facility are also helpful. This is particularly useful to the regional chairs when they are deciding where to have their regional dinners.

Call food service providers at least two days before your event with your attendance number (guarantee) or within the time frame specified in their agreement. **Catering bills are typically based on your guarantee.**



## **2-DEVELOP THE PROGRAM**

Develop a draft of the program/agenda for review by the RAC officers as soon as possible. Draft may include titles only of workshops, planning and plenary sessions, breakout sessions, RAC officer meeting, special tours, events or speakers and regional meeting. Just enough information for the RAC officers to understand what each session is about should be sufficient. Allow the RAC officers to see this as soon as possible to allow them the option of adding something that may have been overlooked or a new item they deem necessary for discussion.

### **2.1 Themes & Logos**

Consider having a meeting theme or tagline. This helps to focus your meeting on a specific topic and is a useful filter when

deciding which session ideas to pursue and which ones to abandon. A logo can incorporate or complement the theme or tagline. It can also be used on all correspondence, printed materials, meeting bags and other promotional items to provide a unified look for the meeting materials.

The meeting program can be successfully structured in a variety of formats. While there are some sessions that are traditionally included in every annual meeting, each region and host state is encouraged to “personalize” the meeting and use the format that best meets the needs of the program they intend to provide.

## **2.2 General Program Items**

- **Registration** – A registration period is necessary even if all participants are pre-registered. Attendees must still check in and pick up meeting materials. Here is where you can show attendees where the “message” board is and identify any changes in the program.
- **Opening Session** – Most meetings have an opening session, which may or may not feature a keynote speaker. The opening session should include a welcome address designed to energize the audience and set the tone for the rest of the meeting. Other speakers may be used instead of or in addition to a keynote speaker, such as RAC officers, and federal or local officials.
- **General/Plenary Sessions** – Plenary sessions bring all attendees together and are typically used for opening and closing sessions, business sessions, receptions, meals, and sessions of interest to all participants.
- **Follow-up sessions** – These sessions provide additional time for a small group to discuss topics presented at a previous session and should include the presenter or speaker from the first session.
- **Breakout/Concurrent Sessions** – When two or more sessions are held at the same time they are known as concurrent sessions. These sessions typically divide attendees into relatively equally sized groups to discuss different topics. In some cases, attendees can choose the breakout sessions they wish to attend; in other cases they are assigned (e.g., regional breakout meetings). Various presentation methods can be used in breakout sessions, some of which are described in the next section. Concurrent sessions are advantageous when you have several specialty topics that are potentially of interest to smaller segments of your audience. They are a disadvantage to those who want to “see and do everything” offered at the meeting.
- **Breaks** – Most people find it uncomfortable to sit for more than two hours without some sort of break. You can provide frequent short breaks (10-15 minutes) when running short consecutive sessions, but longer breaks (at least 30 minutes) are preferable after longer sessions. Organized breaks between consecutive sessions help to keep your meeting on schedule, but when your schedule cannot accommodate this, attendees should be encouraged to take independent breaks as needed.
- **Workshops** – Workshops frequently involve hands-on or interactive discussions, demonstrations and training for participants. Workshops have traditionally been offered on the first day of the meeting to minimize travel for those who only want to attend the full meeting sessions. RAC 101 is a workshop for new Research Managers that is frequently provided on the first day of the annual meeting.
- **Closing Session** – A closing session should send your audience away feeling informed and content. Ceremonies, special videos, entertainment, summary reports from breakout sessions, and presentations made by the hosts of next year's meeting are good things to consider including in the closing session.

- **Receptions** – An opening reception is a good opportunity to network and get to know meeting participants in a relaxed atmosphere before the general business meetings. RAC typically hosts a reception the evening of the first day to allow members to get reacquainted before launching the regular business meeting. An icebreaker may be useful if it is simple, relaxed and engaging. Consider getting a sponsor(s) to pay for these activities.
- **Banquets** – This includes all meals provided for the entire group. You may not want to provide every meal for attendees, particularly when there are several appealing options within walking distance of the meeting venue, but it's good to have a few of these in your program for the following reasons:
  - To provide networking and fellowship opportunities for attendees.
  - To reduce the out-of-pocket travel expenses for attendees, since the meals are typically included in the registration fee.
  - To set the mood for a subsequent session.
  - To make awards, presentations, or announcements.
  - To present guest speakers.
  - To offer a transitional period between two segments of the meeting.
  - To continue a plenary session when a break is needed but time is limited.
- **Tours/field trips** – These trips are often scheduled for entertainment purposes or to provide a convenient way to visit local attractions. Consider whether or not your locale has something unique to offer and if the cost to experience this will be included in the registration fee or treated as an option. This may be an issue for states that do not pay for entertainment provided at meetings. Some states may need to have a business meeting or technical presentation during the group evening event to ensure that the event is integral to the meeting and not solely an entertainment activity. The program committee should be made aware of this and plan accordingly. This may also affect whether or not the cost can be included in the overall registration fee. Attendees who have difficulty with this restriction may still be interested in participating if they can pay for it separately using their own funds.
- **Free time** – Free time is any break period of more than thirty minutes when attendees have time to do what they want. Free time allows attendees to take care of business matters, attend exhibits, shop, sightsee, exercise, rest, check out, or simply prepare for a special part of the meeting program. Meetings that last for more than a day need to have adequate free time to keep attendees energized and engaged.

## **2.3 Traditional RAC Program Sessions**

- **National Speakers** – This session provides updates on national issues from AASHTO, TRB, FHWA, RITA and occasionally other modal administrations.
- **Regional Research Highlights** – This session showcases research projects/activities from the host region.
- **Roundtable Discussion** – This session provides an open discussion between all meeting participants on a variety of topics, which are usually determined in advance. The host region for the last national meeting typically plans and moderates the roundtable discussion for the current national meeting.
- **RAC Dinner** – The RAC dinner is usually coupled with a tour or field trip and is frequently scheduled for the evening of the first full meeting day. Since some states have restrictions on providing motivational speakers or entertainment as part of a meeting program, this portion of the program may need to include a business element in order to be approved. This can

frequently be addressed by including a technical presentation during the dinner or by having another sponsor for the event.

- **Regional Meetings** – Adequate time should be provided to conduct regional business and to gather regional feedback on national issues. Dinners planned by each region are usually scheduled for the evening of the second full meeting day. Be sure to provide regional chairs with a list of local options and recommendations.
- **RAC Officers' breakfast (or dinner)** – The hosts for the current meeting and for next year's meeting should also be invited to this gathering to share meeting planning information and tips.

## **2.4 Awards & Recognitions**

Awards have not been a typical element of the AASHTO RAC meeting, but you could consider including a "light hearted" recognition. For example, a gift/trophy for the participant who was the "most lively," "asked the most questions," or "had the most fun" could be given. The award categories could change each year and they could become traveling trophies that go to different recipients each year.

## **2.5 Spouse/Family/Guest Considerations**

You can provide a program for spouses, family members & guests or simply provide a list of local attractions, activities and events that they can experience at their leisure. Frankly, it's a good to consider both. One program per day for family members is important and if they are not interested in it, they can pick a local attraction that meets their interests. Special tours that are conference related can also be interesting for family members

Consider including a provision that allows family members to join attendees for meals and evening activities. Prepare special name badges for them to facilitate socializing and to enable you to track who has paid.

## **2.6 Presentation Methods**

The following presentation methods are most commonly used in the research community, but other methods can be considered to add interest and variety to your program.

- **Buzz group or buzz session** – In a buzz session the audience is divided into small groups for a limited period of time. Each group member is asked to contribute his or her ideas or thoughts. Buzz sessions can be used to develop questions for a speaker or panel, offer ideas regarding how to address an issue in the future, or react to the information that has been presented in the session. Buzz groups can be used in general sessions or concurrent sessions.
- **Brainstorming session** – A group problem – solving technique in which members let fly with ideas and possible solutions to the problem.
- **Case study** – A case study provides a detailed report of an incident or event through either an oral or written presentation, and sometimes on video. A discussion usually follows the presentation. This is a very effective method for large workshops.
- **Clinic** – A clinic is a session in which participants respond or react to a common experience. A clinic may be used as a follow-up session after a field trip.

- **Interview** – Using this method, one or more people respond to questions from an interviewer. This is particularly effective for a breakout session in which the person being interviewed is an outsider who has expertise or skills that easily transfer to the research community.
- **Panel** – This involves a group of experts that makes an orderly presentation on an assigned topic. The audience may or may not ask questions or participate in the discussion.
- **Roundtable/ Town Hall Discussion** – This is similar to a panel presentation, except the audience has an opportunity to discuss the issues with the panel of experts. Questions are frequently submitted in writing to the moderator who groups similar items together before presenting them to the panel for response.
- **Speech/Lecture** – In a speech, one speaker makes a formal oral presentation. It is usually a one-way communication, but can be followed by a question and answer period.
- **Work Groups** – Usually the audience is divided into groups with the goal of producing a product at the end of the discussion. A group leader is selected to present the thoughts of the work group to the entire audience. Everyone is given an opportunity to participate in the groups. The products of the groups may be presented immediately after the group discussion or at a later session.

## **2.7 Organizing Sessions**

To keep attendees engaged, schedule interactive or more stimulating sessions after lunch when many people are typically a little sluggish.

Use forms for speakers to submit abstracts and bios in a standard format. Specify a maximum word limit to ensure uniformity and quick introductions.

(See **Appendix F** for a sample Session Organization form.)

### **2.7.1 Finding Speakers and Presenters**

Once you've determined the format you plan to use for a particular session, you will need to identify speakers and presenters. In general, the topics you select will dictate the speakers you need to pursue, but occasionally the converse is true. A very interesting and dynamic speaker may be willing to present on a relevant topic that you might not have considered. If it is potentially appealing to the audience, then consider modifying your program.

If speakers aren't lining up at your door offering you their services for free, then the first place to start looking is in the states within your region. Next, consult the RAC officers and RAC members in other regions, speakers and attendees from previous meetings, speakers from meetings sponsored by your colleagues, State and national associations and their members, University Transportation Centers, TRB staff and committee members, FHWA, etc.

### **2.7.2 Contacting Prospective Speakers**

Once you've identified prospective speakers, you can contact them informally to tell them about the meeting and let them know that you are considering a session on a particular topic they may be interested in addressing. Give the date and approximate time of the session, if possible, and a description of the audience. Tell the prospect how long the presentation would be if you included the topic in your program. Include information on the expenses you will cover, the honoraria you offer, accommodations, etc. Speakers for the RAC national meeting aren't typically compensated for their

services, but you can sometimes build the cost of this into the overall registration fee in order to provide a particularly desirable speaker. If the prospect is interested and available, and you are familiar with his/her presentations, then you can make a firm offer at this point. If, however, you are not knowledgeable about the prospect's background or presentation skills, you can explain that you are considering several speakers and ask for additional information to help make the final selection. This information could include lists and/or copies of other presentations made by the prospect and references.

When you have made a final choice on which speakers you would like to invite, contact the speaker again. If the speaker agrees to participate in your meeting, follow up with a letter or e-mail.

The follow-up letter or e-mail should include:

- Date, time, location and address of the meeting.
- Purpose of the meeting.
- Size and general profile of the target audience.
- Topic of the presentation and length of time of the session.
- Names and contact information for other presenters scheduled for the same session. Encourage speakers to coordinate presentations to minimize potential duplication of remarks and ensure adequate coverage of topics.
- Layout of the room where the presentation will be given.
- Acceptable attire or dress requirements.
- Honorarium and expenses to be paid, if applicable.
- Details regarding travel, accommodations.
- A deadline for requesting audiovisual aids, if unknown at the time of the invitation, or a confirmation of what will be provided.
- A request for a picture or biographical material, as needed.
- Contact information for session organizer and meeting organizer.
- Include any promotional material you may have on the meeting.

Two weeks before the meeting, send the speaker a reminder and include:

- Any program changes that could affect the speaker.
- Any information the speaker might find valuable.

(See **Appendix G** for a Sample Speaker Control Sheet.)

### **2.7.3 Presentation Guidelines**

Presentation guidelines are critical because they help speakers develop presentations that will be engaging and easily understood by your audience. They also help your meeting run more efficiently. Most people do not appreciate sitting in a meeting that moves too slowly because of a/v technical problems, poor slides, or long winded speakers. Because technology changes as well as presentation preferences, these guidelines should be reviewed and updated annually.

(See **Appendix H** for presentation guidelines.)



## **2.8 Organizing Exhibits**

This should be discussed with the hotel before you sign a contract with them. It could help you decide which hotel to choose. The area (square feet) needs to be viewed to help determine if it is sufficient for your exhibitors. Internet access will probably be the most difficult to obtain and you may have limits on the number of IP addresses you can have.

## **3-DEVELOP & MANAGE THE BUDGET**

The budget is a planning and management tool that lists all anticipated meeting expenses, funding sources and projected revenue. The budget is essential for making decisions, controlling expenditures, negotiating with vendors and determining your registration fees.

The coordinator should control the budget, since he/she is responsible for paying the bills. However, the coordinator should consult with the planning committee to ensure final expenses for meeting attendees will be reasonable and acceptable.

To prepare the budget, it is helpful to use a detailed checklist to determine which costs will be paid by the meeting **master account** and which will be paid by attendees. This division of expenses is sometimes referred to as a **split folio**. There are many ways a folio can be split between master account charges and individual guest charges. Be sure to clearly communicate your split folio plan to the hotel, in writing, when your **letter of agreement** is prepared.



### **3.1 Determining the Registration Fee**

Before sending out the final meeting brochure/announcement, you need to determine a meeting registration fee. You should cover your expenses but keep the costs as low as possible so participants can afford to attend. Try to find a balance between providing amenities and keeping costs down. The goal is to break even. If your DOT budget allows for it, you can contribute to the meeting (e.g., printing and publication costs, mailing costs, etc.) If not, these costs must be figured into the registration fees.

To calculate the registration fee, get the budget and meeting proceedings from previous years and use this information as a guide. Use prior attendance to set your expected attendance limits. As a general rule forecast low and never budget for more people than attended last year.

Next, determine your variable costs. These include expenses that change according to the number of attendees (e.g. meals, name badges, etc.). Then calculate your fixed costs, which include expenses that are not affected by the number of attendees (e.g. Keynote speaker fees, room rentals, equipment, etc.).

Look for hidden costs such as taxes, gratuities and other service charges. Many states are tax exempt so be sure to have these costs removed when appropriate.

Be sure to include the following costs: Publicity (brochure, printing, postage, website development), facilities (meeting rooms, equipment rentals, internet connections), staff (non-volunteers hired for the meeting), transportation (busses to evening events, shuttles to airport), meals and snacks, meeting materials (packets, name tags, etc.).

Forecast revenue from sponsorships, donations and advertising. You may be able to get a university, vendor or other group to sponsor a meal, break, or opening reception. They may also be interested in providing meeting registration bags or other items in exchange for vendor space, free registration, pages in the program or the opportunity to do a presentation. Be sure to consult your DOT's policies regarding sponsorships before pursuing any of these options.

Determine your breakeven number, which is the amount of revenue required to pay all your fixed costs, minus your revenue from sponsorships. Once you have this you can calculate your registration fees. Your cost per person is the breakeven number, divided by the number of attendees, plus the variable fees.

Cost per person = 
$$\frac{(\text{All fixed costs} - \text{Revenue from sponsorship/donations})}{\text{Expected number of attendees}} + \text{variable fees}$$

You should calculate fees for low, high and average expected attendance to get a good idea of the limits of what you should charge. If your registration fees end up being too high, review your budget with respect to the meeting's goals and objectives. Decide which items are necessities and which ones are luxuries that you can live without.

Registration fees are usually in the \$300 - \$400 range.

Select a deadline for advance registration and offer a discount for meeting this deadline. All advance registrations should also be pre-paid. Set separate registration fees for guests/family and make an effort to keep these at a minimum.

### **3.2 Hotel Room Registration**

Hotel rooms are typically not included in the meeting registration fee. In other words, attendees should contact the hotel to make their own reservations, but you should negotiate a conference rate that is lower than any discounted rate they could get if they booked a room as a non-meeting guest.

The hotel room rate is usually in the \$100 - \$125 per night range. If you opt for a hotel that has higher room rates try to decrease the registration fee to help keep the overall costs reasonable for the average attendee.

### **3.3 Accounting Procedures**

You should work with your institution to determine the best (i.e., most prudent) method for handling registration fees and paying meeting bills. Often a special account can be set up just for your meeting.

Find out at the start what accounting procedures are to be used (for example, what kind of documentation will be required to get reimbursements from this account.) Also, make provisions so that any profits can be forwarded to the host state for next year's meeting, if necessary.

Specify provisions for refunds. Questions you should answer include the following: Are registrations transferable? Are they refundable? If so is there a cutoff date? Will the refund be given before or after the meeting?

(See **Appendix I** for a sample Budget.)

## **4-MATERIALS, EQUIPMENT & SUPPORT SERVICES**

### **4.1 Invitation Lists**

Typically, invitations are sent to approximately 300 people but actual attendance generally ranges from 100 – 150.

- AASHTO SCOR & RAC members and affiliates
- Bill Zaccagnino has a list of who to invite from FHWA
- Local DOT and FHWA staff

### **4.2 Meeting Materials**

- Sign-in sheets
- Meeting Signage
  - Meeting Welcome signs
  - 24" x 36" breakout session signs
  - Special meeting room signs
  - Sponsor recognition signs
  - Registration and Exhibit area signs
  - Registration Table tent showing dates and hours of operation
  - Direction signs to navigate hotel
  - Table reservation signs
  - Podium signs
- Other stuff, such as tents for handout areas and completed evaluations

### **4.3 Participant Materials**

#### **4.3.1 Printed Materials List (Multiple Copies)**

- Program
- Handouts
- Presentations & Notes pages
- List of attendees and their contact information
- Acknowledgements
- Maps and driving directions (between airport and hotel, and other off site meeting locations, if appropriate)



- Tickets for receptions, meals, outings (if applicable)
- Surveys & Evaluations
- Local restaurant lists
- List of local attractions
- Transportation resources (shuttles, mass transit, cabs and typical fares to meeting events and local attractions)

#### **4.3.2 Printed Materials List (Single Copies)**

- Attendee name badges
- Volunteer/Staff name badges
- Speaker name tents

#### **4.3.3 Printed Program/ Meeting Book**

At a minimum, the printed program should include the agenda, speakers' bios, and space for notes. A hotel floor plan is also helpful so participants can locate meeting rooms and other key gathering spaces. Some people like to have detailed handouts and room for lots of notes; others like having as little paper as possible and would prefer a CD of the handouts and presentations after the meeting. Balancing these different preferences can be a challenge, but understanding the advantages and disadvantages of each can help you decide how to proceed.

A bound collection of handouts is convenient and easy to handle, but in order to provide these, speakers need to submit materials well in advance to allow enough time to print and bind everything. On the other hand, loose-leaf binders may be cumbersome for some participants, but they offer the flexibility of being able to add the last-minute presentations you will inevitably receive.

#### **4.3.4 Name Badges**

Printing name badges from your registration database will save a lot of time. Ask attendees to specify their name as they want it to appear on their badge. Consider including last names for easier identification and use ½" high letters (minimum) for legibility. If volunteers and staff assisting with meeting execution are not easily identifiable (for instance by wearing matching attire) then consider using a noticeably different name badge for these individuals. This will help attendees identify people who can provide them assistance.

Don't forget to order plastic sleeves with clips and lanyards. Invite participants to recycle these at the end of the meeting.

#### **4.3.5 Name Tents**

Name tents should be printed on both sides and preferably visible from the back of the meeting room; however, this is rarely possible for large meetings. So use tents that are at least 5.5" x 17" with 80 pt. font heights for names and 28 pt. for organizations. They should be durable enough to function for the duration of the meeting.

#### **4.3.6 Promotional Items**

Some states have restrictions or limitations on supplying "freebies" and other "non-essential" items for conferences and meetings. Verify these restrictions in advance and plan accordingly. Another state within your region may be able to provide these without restrictions.

Consider having each state in the sponsoring region donate promotional items to reflect regional involvement.

Items you might want to consider include:

- Bags and portfolios
- Pens, pencils and laser pointers
- Snacks or other food items unique to your state
- Novelty items such as medicine bottles filled with candy and marked with a research related “prescription label.” For example, the prescription could be for relief of “traffic CONGESTION” or some other research related “ailment.” Directions could include the following: “Do not take on an empty budget. Most effective when combined with an implementation plan and performance measures. May cause addiction due to positive results.” The doctor’s name could be a research related pun. The creative possibilities are endless!
- Maps
- Bookmarks
- Books/pamphlets/magazines related to the meeting theme
- CDs, DVDs, memory sticks
- Business card holders
- Keychains
- I.D. Lanyards
- Safety items (first aid kits, stranded motorist kits, etc.)
- Lapel pins
- Items with your research or DOT logo or state seal
- Calendars
- Paperweights
- Water bottles and coffee mugs
- Umbrellas
- Sunglasses
- Shirts with meeting logo
- Memo cubes and note pads
- Desk “toys”
- Any appropriate items you have on hand or can get donated in the required quantities.

An Internet search for “corporate promotional items” will yield additional ideas.

#### **4.4 Equipment, Computers, and Support Services**

Determine what portable equipment you can provide and what you must rent (e.g. screens, LCD projectors, microphones, laser pointers, cordless mice, speakers, laptop PCs, monitors, color printers, extension cords, power strips, and walkie/talkies or cell phones to communicate with hotel staff and meeting planning personnel).

Provide information on the software, platforms, and video capability (VCR, DVD) that will be available to speakers.

Ask speakers for their audio/visual needs (PowerPoint, video, VCR, DVD, etc.) in advance.

Consider a locked central distribution area to secure equipment when not in use.

Make sure you have support staff to set up equipment, test it, troubleshoot problems, and disassemble and remove equipment after use.

## **5-EXECUTE THE MEETING PLAN**

Execution of the meeting plan begins with registration and ends with evaluation; obviously conducting the meeting falls in between. This is where all of your hard work should pay off so give as much attention to execution as you did to planning.

### **5.1 Registration**

Registration should be a fast, simple, and painless procedure. This applies to **advance registration** as well as **onsite registration**.

#### **5.1.1 Advance Registration**

- Determine and request only the information you need. Don't use registration forms as a survey to gather information for another project.
- Ask respondents to print answers.
- Allow respondents to check off or circle answers instead of writing them out.
- Provide one office contact person and phone number to answer questions.
- Provide an incentive for early registration (discounted registration fees, special maps, etc.)
- Indicate "Make Checks Payable To: \_\_\_\_\_"
- On-line registration requires that the host DOT be able to accept credit cards to pay for payment. The host DOT may or may not be able to provide this service.
- If credit cards can be accepted, indicate which ones. Have participants write in the total to be charged to the card and provide a signature from the authorized card holder.
- Give an advance registration cutoff date.
- Indicate what is included in the registration fee – meals, meeting materials, tours, etc.
- Confirm registrations with a short letter. Confirm workshops and pre-registered activities, list program changes, and provide reminders for ground transportation or hotel check-in.

(See **Appendix J** for a sample registration form.)

#### **5.1.2 Onsite Check-In and Registration**

- Make a checklist for onsite supplies and equipment.
  - \_\_\_\_\_ Tacks, pins, scotch tape (regular and double-sided) and duct tape
  - \_\_\_\_\_ Stapler, staples, and staple removers
  - \_\_\_\_\_ Scissors
  - \_\_\_\_\_ Glue



- \_\_\_\_\_ Paper clips
- \_\_\_\_\_ Pens/pencils
- \_\_\_\_\_ Paper
- \_\_\_\_\_ Receipt forms (in duplicate)
- \_\_\_\_\_ Blank registration forms
- \_\_\_\_\_ Tour sign-up sheets (if applicable)
- \_\_\_\_\_ Laptop computer & printer (w/ extra color cartridges if applicable)
- \_\_\_\_\_ Power cords
- \_\_\_\_\_ Printer paper
- \_\_\_\_\_ Calculator
- \_\_\_\_\_ Extra tickets & programs
- \_\_\_\_\_ Blank name badges, holders and lanyards
- \_\_\_\_\_ Cell phone or walkie/talkie
- \_\_\_\_\_ Information and message centers
- \_\_\_\_\_ Maps
- \_\_\_\_\_ Emergency phone numbers
- Inspect the registration area for proper lighting, ventilation and cleanliness.
- Be sure the registration area does not impede the flow of traffic. You want people to stop, register, and move on (to the reception, the opening session, exhibits, etc.).
- Have two registration areas: One for pre-registration check-in and one for onsite registration.
- Make meeting check-in/registration one stop. Tickets, name badges, programs, maps, information on local restaurants, tours, list of pre-registered attendees, handouts, writing materials for notes during meetings, etc. should be preassembled in one packet.
- Be prepared if a large number of onsite registrations is expected.
- Have adequate staff on duty. Attendees shouldn't have to wait more than 5 minutes to get registered.
- Meet and train registration personnel prior to the meeting. Provide written instructions and responsibilities. Make sure they know what information is needed and how to handle problems and money.
- Keep a "gopher" in the registration area.
- Establish a policy for how to handle:
  - \_\_\_\_\_ Lost badges, tickets, programs, etc.
  - \_\_\_\_\_ "Lost" registrations
  - \_\_\_\_\_ Attendees who want their agency billed
  - \_\_\_\_\_ Pre-registered attendees who still owe money
  - \_\_\_\_\_ Walk-ins at a meeting closed to walk-in registrations
  - \_\_\_\_\_ Handling money and collecting it
- If computerized registration is used, make sure that at least two registration workers are familiar with the hardware and software. Keep a hard copy on hand, just in case...
- Determine whether registration supplies and equipment need to be securely stored.
- Designate one person to be in charge of the registration area.

## **5.2 Meeting Room Set-up**

Include one or two stands with monitors that allow speakers in large rooms to view presentations while seated on the dais facing the audience.

In large rooms provide at least two 12-ft. screens for the audience to view presentations.

For classroom seating, consider spacing seats no closer than 2 per 6 feet to allow adequate room for participants to take notes and sit for several hours without having to straddle table legs.

Provide water for all speakers and preferably for all attendees.

Set up name tents for each session at speaker table. (Assign someone to do this.) When speakers will be giving multiple presentations in various rooms, it might be more convenient to give them their name tents and ask them to place them on the dais before each talk.

**Check on your meeting or dining room at least 30 minutes before your event is scheduled to begin;** refer to your event planning form when checking on proper room arrangement, etc. Check microphones and other equipment to be sure they are working properly. Make sure presentations are loaded and functioning. Make sure handouts are available.

Have an extra room available for impromptu meetings and storage.

### **5.3 Using Signs**

- Place signs at the doors of all workshops and sessions listing session number (if appropriate), title, name of presenter, and time.
- Place directional signs in lobbies, at end of hallways, and at the top and bottom of staircases; getting lost in a meeting facility is frustrating.
- Consider using Velcro arrows to make directional signs as flexible as possible.
- Designate a person or several people to be in charge of signs.

### **5.4 Following the Agenda**

- Changes to the agenda are sometimes unavoidable. Adjust when you must.
- Stay on schedule even when the agenda has been changed. Make sure moderators, and the person handling "housekeeping announcements" understand the importance of this.
- When possible, announce changes in the confirmation letter sent to attendees, at general sessions and workshops, and at the registration desk. Print and distribute flyers if necessary.

### **5.5 Evening Events**

- A list of attendees may need to be submitted to your evening event host prior to your event. Inform guests in advance if they will need to show a meeting name badge and/or ticket and/or photo identification.
- If you are providing transportation for attendees to an evening event, confirm the number in advance to ensure adequate seating is available.

### **5.6 Staffing**

During the meeting, the coordinator will be extremely busy with handling the details of executing the meeting. An informed and trained staff of volunteers is necessary to help the coordinator ensure that the



meeting runs smoothly. The coordinator should delegate many of the meeting responsibilities and clearly communicate what needs to be accomplished. Here are some tips to follow:

- All staff should have a thorough knowledge of the meeting program and the floor plan of the meeting facility.
- Use a moderator for each session. This person should keep the session on schedule, introduce guest speakers, help distribute handouts and evaluations and manage Q&A periods. A speaker should not have to introduce another speaker. The moderator should open and close the session and can be seated either at the platform or in the audience.
- Delegate **housekeeping announcements** to one person other than the coordinator.
- Use walkie-talkies to communicate between meeting staff and hotel staff.
- Provide **written instructions** to registration personnel, moderators and planning committee members.
- Set aside time for **training**.
- Assign an **audiovisual coordinator** to oversee audiovisual requirements. This coordinator's duties may include moving equipment between sessions from room to room, setting equipment in place, or working with contract audiovisual professionals as needed.
- **Make all meeting staff and volunteers feel important and appreciated.**

## **5.7 Evaluations/Surveys**

Develop brief surveys for each session and meeting activity to get feedback for next year's planning committee. Try to summarize the feedback immediately. Consider having registration staff do this during down times. Creating a spreadsheet or database with the same fields as the survey might make this task easier.

Learn the needs and interests of your target audience. Don't tell them what you think they want to hear; let them tell you. Surveys are an excellent way to solicit this feedback, but they are only as helpful as your willingness to use them.

Evaluating **every** element of the meeting probably isn't necessary or worth the effort it would take to do so. Furthermore, numerous or overly complicated evaluation forms tend to discourage rather than encourage feedback. Try to assess the major elements of the meeting that worked and those that didn't work, and determine what should be modified for the future.

Consider evaluating the following elements:

- Meeting location (city and venue)
- Workshop topics and general session topics
- Speakers and presenters
- Special events (tours, receptions, etc.)
- Meeting registration process
- Meeting website
- Menu selections for banquets
- Clarity of meeting purpose
- Meeting program book

The design of the evaluation form should facilitate a quick and easy response and at the same time permit a more detailed reply.

(Sample evaluation forms are provided in **Appendix K.**)

## **5.8 Publicity/Planning**

Six months prior to the meeting – issue a preliminary announcement on the meeting website.

- E-mail to RAC Listserv
  - Include information about points of interest/hotel.
  - Announce meeting theme.
  - Announce meeting dates.
  - Stress importance of pre-registration for meeting planning.
  - Include preliminary registration information.

Three months prior to the meeting – include detailed registration information on meeting website.

- Contact SCOR/RAC and other organizations (i.e. FHWA, TRB, RITA, UTCs, CUTC, etc.);
  - Stress importance of pre-registration for planning.
  - Include updated progress of meeting program.
  - Provide tentative participant/spouse agendas.
  - Provide hotel registration information.
- Second mailing of registration form
- Final on-site meeting with Hotel staff to review function book in detail

Six Weeks Prior to Meeting

- Final mailing to pre-registered participants only, giving update on program and planned activities;
- Include transportation information: names and numbers for shuttle services, etc.

## **5.9 After the Meeting**

- Pay all remaining bills.
- Advise the hotel and other facilities of satisfactory/unsatisfactory service and arrangements.
- Send letters of appreciation to speakers and others who helped to make the meeting successful.  
It is helpful to keep a running list of these individuals and their contributions because it is easy to forget over the many months it takes to plan the meeting.
- Develop a meeting report within 60 days. Include lessons learned and action items.

## **List of Appendices**

- A – Sample History and Fact Sheets**
- B – Sample Hotel Walk thru Check List**
- C – Sample Request for Proposals (RFP)**
- D – Sample Hotel Contract**
- E – Information for Negotiating Agreements and Contracts**
- F – Sample Session Organization Form**
- G – Sample Speaker Control Sheet**
- H – Presentation Guidelines**
- I – Sample Budget**
- J – Sample Registration Form**
- K – Sample Evaluation Forms**
- L – References**

## Appendix A

## Sample Meeting History Sheet

## 2006 AASHTO RAC Meeting: Required Meeting Spaces, Room Blocks &amp; Meeting History

Hosted by the Ohio Department of Transportation

Monique R. Evans, P.E.

Administrator, Office of Research and Development

614-728-6048

September 16, 2005

Expected Attendance: 100

Day	Dates	Sunday 7/9/06	Monday 7/10/06	Tuesday 7/11/06	Wednesday 7/12/06	Thursday 7/13/06
Meeting Spaces	Registration Area		1	1	1	
	General Session		1	1	1	1
	Breakouts			4	4	
	Secure Storage	1	1	1	1	1
	Seated Meals		Lunch & Evening Reception	Breakfast & Lunch	Breakfast & Lunch	
	Other Meals		Afternoon Break	Afternoon Break	Afternoon Break	Continental Breakfast
Room Blocks	Singles	35	75	75	75	15
	Doubles	10	25	25	25	5
	Suites		1	1	1	

**Audience Profile:** Meeting attendees are typically comprised of transportation professionals from state DOTs, federal highway agencies, research institutes, and universities. Attendance is approximately 65% male and 35% female.

**Meeting History:** Approximately 100-125 attendees are anticipated for this annual meeting, which will have a workshop for approximately 50 people on Monday July 10, 2006, followed by full-day committee meetings on Tuesday and Wednesday, concluding with a half-day session on Thursday July 13, 2006. The meeting has been scheduled previously at the Wilmington Hilton, Wilmington, NC (2005) and the Mystic Hilton, Mystic, CT (2004).

## **Sample Fact Sheet**

### **AASHTO Research Advisory Committee (RAC) Annual Meeting “Transportation Research: From Your Doorstep to the Stars” July 10-13, 2006**

Sponsored by the Ohio Department of Transportation and AASHTO Region 3

#### **Background**

The Research Advisory Committee (RAC) provides overall transportation advice to the Standing Committee on Research (SCOR) and the AASHTO Executive and Policy Committees. RAC helps SCOR accomplish its goals by providing assistance in identifying research needs, defining research emphasis areas, utilizing research findings, maintaining an overview of State-related research activities and funding, and employing the National Cooperative Highway Research Program (NCHRP) effectively.

The RAC annual meeting provides an opportunity for the committee to conduct its annual business meeting and to network with others interested in transportation research.

#### **Theme**

**Transportation Research: From Your Doorstep to the Stars: Sessions will explore research from a variety of perspectives such as local through national, short-term through long-term, reactive through strategic and simple through advanced.**

#### **Who should attend?**

Meeting attendees are typically comprised of transportation professionals from state DOTs, federal highway agencies, research institutes, and universities. Attendance is usually around 100.

#### **Location**

The Hilton Columbus at the Easton Town Center will be the site for the meeting and hotel arrangements. The Hilton is located at 3900 Chagrin Drive in Columbus, Ohio 43219. Rooms can be reserved at the conference rate \$149.00 for singles and doubles until **June 18, 2006**. You can make your room reservations on line at [www.hiltoncolumbus.com](http://www.hiltoncolumbus.com) using the code **DOT** or by calling 1-800-HILTONS or 614-414-5000.

#### **Evening Business Meeting**

An evening business meeting is planned for Tuesday, July 11, 2006 at Columbus COSI, where you will have the opportunity to visit an exciting technological exhibit on the second stop of its national tour.

#### **Suggested Attire**

The suggested meeting attire is business for presenters and business casual for attendees.

#### **Questions**

For more information you can visit the meeting website [www.dot.state.oh.us/AASHTORAC2006](http://www.dot.state.oh.us/AASHTORAC2006) beginning in late February. In the meantime, feel free to contact Monique Evans at [Monique.evans@dot.state.oh.us](mailto:Monique.evans@dot.state.oh.us) 614-728-6048 or Sandra Larson at [Sandra.Larson@dot.iowa.gov](mailto:Sandra.Larson@dot.iowa.gov) 515-239-1205.

**Appendix B**

**Sample Site Inspection Checklist**

**\* Traveling from the airport**

\_\_\_\_\_ How far is the airport from the hotel?

\_\_\_\_\_ What is the travel time?

\_\_\_\_\_ Does the hotel offer a shuttle to and from the airport?

\_\_\_\_\_ If so, what is the fare?

\_\_\_\_\_ How often and between what times does the shuttle run?

\_\_\_\_\_ What is the cost by taxi?

\_\_\_\_\_ Are rental cars available at the airport?

**\* Hotel Check-in**

\_\_\_\_\_ When is check-in time? \_\_\_\_\_ When is check-out time? \_\_\_\_\_

\_\_\_\_\_ Is the front desk staff friendly and courteous?

\_\_\_\_\_ How long does it take to check in? \_\_\_\_\_ How many terminals are available?

\_\_\_\_\_ Is the bellperson easy to find? \_\_\_\_\_ Helpful?

\_\_\_\_\_ Does the doorman respond promptly to your arrival?

\_\_\_\_\_ Is the doorman friendly, courteous, and helpful?

\_\_\_\_\_ Is ample luggage storage area available for arrivals before check-in time and departures after check-out time?

**\* Accommodations**

\_\_\_\_\_ How many rooms, not including suites, are available for your meeting?

\_\_\_\_\_ How many suites are available to you?

\_\_\_\_\_ How many beds are provided in each suite?

\_\_\_\_\_ Room rates by occupancy: \_\_\_\_\_ Single \_\_\_\_\_ Double \_\_\_\_\_ Triple \_\_\_\_\_ Suites

\_\_\_\_\_ How many singles are available? \_\_\_\_\_ How many doubles?

- \_\_\_\_\_ How many king-size beds are available? \_\_\_\_\_ Queens? \_\_\_\_\_ Doubles?
- \_\_\_\_\_ Number of rooms handicap accessible?
- \_\_\_\_\_ Number of rooms smoke free?
- \_\_\_\_\_ Does each room have a radio? \_\_\_\_\_ Cable t.v.? \_\_\_\_\_ High speed Internet Access \_\_\_\_\_  
Voicemail?
- \_\_\_\_\_ Does each room have a refrigerator? \_\_\_\_\_ Microwave? \_\_\_\_\_ Coffeepot?
- \_\_\_\_\_ Is express check-out available? \_\_\_\_\_ Video check-out?
- \_\_\_\_\_ Are rooms in good condition? \_\_\_\_\_ Comfortable? \_\_\_\_\_ Fresh smelling?
- \_\_\_\_\_ How many rooms are designated non-smoking?
- \_\_\_\_\_ Does the hotel offer VIP accommodations?

**\* Hotel Services**

- \_\_\_\_\_ Does the hotel have a parking garage? \_\_\_\_\_ Parking lot?
- \_\_\_\_\_ What is the rate? \_\_\_\_\_ Number of available spaces?
- \_\_\_\_\_ Does the hotel have an audiovisual equipment manager?
- \_\_\_\_\_ Are washing machines and dryers available to guests?
- \_\_\_\_\_ Does the hotel have a laundry service?
- \_\_\_\_\_ Is room service available? \_\_\_\_\_ How late?
- \_\_\_\_\_ Does the hotel have a business center?
- \_\_\_\_\_ Are recreational facilities available? \_\_\_\_\_ Game room? \_\_\_\_\_ Fitness center?
- \_\_\_\_\_ Swimming pool? \_\_\_\_\_ Sauna? \_\_\_\_\_ Hot tub? \_\_\_\_\_ Jogging path?
- \_\_\_\_\_ Are shops located on site? \_\_\_\_\_ Beauty salon/barber shop? \_\_\_\_\_ Newsstand?
- \_\_\_\_\_ Toiletries? \_\_\_\_\_ Gift shop? \_\_\_\_\_ Groceries? \_\_\_\_\_ Clothing?
- \_\_\_\_\_ Are coffee/deli counters on site? \_\_\_\_\_ Average prices?

**\* Facilities and Design**

- \_\_\_\_\_ Are hallways and lobby areas neat, clean, spacious, and safe?
- \_\_\_\_\_ Is there an area to comfortably handle meeting registration?
- \_\_\_\_\_ Can you hang banners or welcoming signs in public areas?
- \_\_\_\_\_ Are there enough restrooms? \_\_\_\_\_ Are they conveniently located?
- \_\_\_\_\_ Are there enough elevators and stairways to comfortably move attendees?
- \_\_\_\_\_ Are all areas accessible to the handicapped?
- \_\_\_\_\_ Does the facility have a secured storage area?
- \_\_\_\_\_ Does each room have a smoke alarm? \_\_\_\_\_ Sprinkler system?
- \_\_\_\_\_ Is the temperature in public areas comfortable?
- \_\_\_\_\_ Are all areas well lit? \_\_\_\_\_ Fresh smelling? \_\_\_\_\_ Are noise levels acceptable?

**\* Meeting Rooms**

- \_\_\_\_\_ Number of breakout rooms available to you (not including ballroom)?

**Collect data on each room.**

\_\_\_\_\_ Room name \_\_\_\_\_ Location

Capacity: \_\_\_\_\_ Theater \_\_\_\_\_ Classroom \_\_\_\_\_ Round tables

- \_\_\_\_\_ How are the rooms usually set?
- \_\_\_\_\_ Is there an extra charge for resetting?
- \_\_\_\_\_ Are the following items complimentary, extra charge, or not available:
- \_\_\_\_\_ Pens/pencils and notepads for participants? \_\_\_\_\_ Speakers' podium?
- \_\_\_\_\_ Microphone? \_\_\_\_\_ Flipchart? \_\_\_\_\_ Chalk board? \_\_\_\_\_ White board?
- \_\_\_\_\_ Markers? \_\_\_\_\_ In-room water station? \_\_\_\_\_ Candy/Mints? \_\_\_\_\_ Projection screen?
- \_\_\_\_\_ Is lighting controlled within the room? \_\_\_\_\_ Does it have a dimming switch?
- \_\_\_\_\_ Are temperature controls within the room?



\_\_\_\_\_ Is any other group using the room before/after your meeting?

\_\_\_\_\_ Can signs be taped/pinned to the walls?

\_\_\_\_\_ Are signs outside the room attached to the door? \_\_\_\_\_ Walls? \_\_\_\_\_ Easel?

\_\_\_\_\_ Are easels complimentary? If so, how many \_\_\_\_\_?

\_\_\_\_\_ Is the room carpeted? \_\_\_\_\_ Does it have pillars? \_\_\_\_\_ Mirrors?

\_\_\_\_\_ Windows? \_\_\_\_\_ Outside balcony/patio?

**\* General Session Rooms/Banquet Room**

Many hotels and meeting facilities have a banquet room or grand ballroom that may be divided into smaller general session rooms. Collect data on the large room and each smaller room.

\_\_\_\_\_ Room name \_\_\_\_\_ Location \_\_\_\_\_

Capacity: \_\_\_\_\_ Theater \_\_\_\_\_ Classroom \_\_\_\_\_ Round tables \_\_\_\_\_

Capacity with Head Table: \_\_\_\_\_ Theater \_\_\_\_\_ Classroom \_\_\_\_\_

\_\_\_\_\_ Round tables \_\_\_\_\_

\_\_\_\_\_ Does the room have movable walls?

\_\_\_\_\_ Will any other group be using any adjoining room before, during, or after your meeting?

\_\_\_\_\_ Does the room have a sound system? \_\_\_\_\_ How is it controlled?

\_\_\_\_\_ Is there an extra charge for podium? \_\_\_\_\_ Microphone?

\_\_\_\_\_ What type of lighting does the room have? \_\_\_\_\_ How is it controlled?

\_\_\_\_\_ Can a banner be hung or attached to walls?

\_\_\_\_\_ Does the room have audiovisual screens? \_\_\_\_\_ How many?

\_\_\_\_\_ Where are they located?

\_\_\_\_\_ Is the room carpeted? \_\_\_\_\_ Does it have pillars?

**\* Other Considerations**

\_\_\_\_\_ What is the policy on complimentary rooms?

- \_\_\_\_\_ Is a depressed-season or shoulder rate available?
- \_\_\_\_\_ Is a deposit required? \_\_\_\_\_ When? \_\_\_\_\_ Will they take a letter of commitment in lieu of a deposit?
- \_\_\_\_\_ Does the hotel overbook?
- \_\_\_\_\_ Who is responsible for damage?
- \_\_\_\_\_ Are all major credit cards accepted?
- \_\_\_\_\_ Does the property have a security force? \_\_\_\_\_ On a 24-hour basis?
- \_\_\_\_\_ Are hotel personnel trained in CPR?
- \_\_\_\_\_ Are guests provided with free transportation to any local attractions?
- \_\_\_\_\_ Are there any minimum requirements for menus/buffets/banquet services?
- \_\_\_\_\_ Are service charges, gratuities, or sales tax added to food and beverage prices?
- \_\_\_\_\_ Are there insurance requirements?
- \_\_\_\_\_ Does the facility offer complimentary coffee, breakfast, or evening hors d'oeuvres?
- \_\_\_\_\_ What is the facility's cancellation policy?
- \_\_\_\_\_ What additional charges can be expected for items such as bar services, table setups, maintenance/electrical assistance?
- \_\_\_\_\_ Can room rates or menu prices be guaranteed?
- \_\_\_\_\_ Are there any plans for remodeling, construction, room upgrades, management changes, etc.?
- \_\_\_\_\_ Are there any other major conferences scheduled for the same period? If so, what are they?

## **Appendix C**

### **SAMPLE REQUEST FOR PROPOSALS**

October 17, 2005  
6 pages

**MEETING:** American Association of State Highway and Transportation Officials Research Advisory Committee (AASHTO RAC) 2006 Annual Meeting

**HOSTED BY:** The Ohio Department of Transportation, Office of Research and Development (ODOT R&D)

**DESTINATION:** Columbus, Ohio

**PREFERRED LOCATION:** A quality property with meeting space and sleeping rooms that can accommodate the requirements

**DATES:** Sunday, July 9, 2006 - Thursday, July 13, 2006

Please let us know if you cannot accommodate the requested dates.

**PROFILE & ATTENDANCE:** The American Association of State Highway and Transportation Officials (AASHTO) is a nonprofit, nonpartisan association representing highway and transportation departments in the 50 states, the District of Columbia and Puerto Rico. It represents all five transportation modes: air, highways, public transportation, rail and water. Its primary goal is to foster the development, operation and maintenance of an integrated national transportation system. Much of AASHTO's work is done by committees comprised of member department personnel who serve voluntarily. The Association provides a forum for consideration of transportation issues, and is frequently called upon by Congress to conduct surveys, provide data and testify on transportation legislation.

The Research Advisory Committee (RAC) provides overall transportation advice to the Standing Committee on Research (SCOR) and the AASHTO Executive and Policy Committees. RAC helps SCOR accomplish its goals by providing assistance in identifying research needs, defining research emphasis areas, utilizing research findings, maintaining an overview of State-related research activities and funding, and employing the National Cooperative Highway Research Program (NCHRP) effectively.

The RAC annual meeting provides an opportunity for the committee to conduct its annual business meeting and to network with others interested in transportation research. The group will be comprised of transportation professionals from state DOTs, federal highway agencies, research institutes, and universities with budget constraints so cost lowering ideas are appreciated.

Approximately 100-125 attendees are anticipated for this annual meeting, which will have a workshop for approximately 50 people on Monday July 10, 2006, followed by full-day committee meetings on Tuesday and Wednesday, concluding with a half-day session on Thursday July 13, 2006. The meeting has been scheduled previously at the Wilmington Hilton, Wilmington, NC (2005) and the Mystic Hilton, Mystic, CT (2004).

**SLEEPING ROOMS:**

Please indicate in your proposal the total number of sleeping rooms in the hotel. Also advise if the hotel is fully accessible and provide the number of ADA guest rooms. **An attractive room rate will be a major determining factor, with your government per diem rate as the preferred maximum.** A flat rate for single/double occupancy is preferred to facilitate spouse/guest attendance. The rates are net, non-commissionable. Individuals will make their own reservations and be responsible for all charges; a small rooming list will be sent by ODOT for staff. A 1/50 (or better) cumulative basis complimentary ratio and having the group rate honored prior to and after the block would be appreciated.

No more than a 3-week cutoff date is requested and ODOT will publish a 4-week cutoff. The group rate is requested based on availability after the cutoff. Please advise if the hotel offers Internet reservations.

Provide check-in and checkout times and the date a reservation may be cancelled without penalty; indicate if the credit card provided to guarantee arrival is charged when the reservation is made or if the guest is a no-show, and if there is an early-departure fee. The following block is requested, representing 375 room nights:

Day/Date	Sunday July 9	Monday July 10	Tuesday July 11	Wednesday July 12	Thursday July 13	Total
2006 Block	<b>50</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>30</b>	<b>380</b>
<b>2005 Pickup</b>	<i>55</i>	<i>90</i>	<i>82</i>	<i>82</i>	<i>26</i>	<i>346*</i>

*\* Includes 7 rooms on Saturday before meeting and 2 rooms on Friday and Saturday afterwards.*

**FOOD & BEVERAGE:**

Lunch, an afternoon break, and an evening reception with a cash bar are likely on Monday. Breakfast and/or a morning break, lunch and an afternoon break are likely on Tuesday and Wednesday. A continental breakfast is likely on Thursday. Please provide the current menus (by email if possible), food and beverage tax, the gratuity/service charge percentage, if the gratuity is taxed, the guarantee percentage overset, and when guarantees are due. We would like to have food and beverage prices confirmed for our meeting at the time the contract is signed. If there are minimum group size service charges we would appreciate having them waived for three meals. We would appreciate complimentary morning coffee breaks on days when full breakfasts are provided.

**FUNCTION SPACE:**

All meeting rooms should accommodate a data projector and screen. The general session room should accommodate an elevated head table for 6, a lower table in front of the head table for speaker's monitor, and two tables for materials located preferably at the rear of the room. Please note all complimentary items provided in the setup for each meeting room (e.g. water, pens, pads, candy dishes, blackboards, microphones, etc.) Advise if there are additional charges or inventory limitations for lecterns, risers, or other equipment and provide a facility service guide, if available. ODOT meetings usually require no additional meeting room setup charges. Please advise if a complimentary Nextel (or other radio system) is available for ODOT staff use during the meeting dates to communicate with hotel staff.

Based on the sleeping room block and the anticipated food and beverage, we would appreciate any meeting room rental being waived. Please show the tentative room names in the proposal and provide the meeting space floor plans with capacity charts that indicate the ceiling heights. If the floor plans do not provide an accurate representation of the locations of rooms in relation to one another, then information must be provided on the distance to move between the rooms. ODOT meetings require fully accessible meeting space. **The meeting space names blocked must be provided or the proposal will not be considered—this is one of the most important considerations.**

<b><i>Sunday, July 9, 2006</i></b>	<b>SCHEDULE OF EVENTS</b>		<b>Tentative Room Name (Hotel please provide)</b>
Noon-Midnight	Storage	Small lockable storage area	
<b><i>Monday, July 10, 2006</i></b>			
7:00am-11:00pm *	Storage	Small lockable storage area	
7:00am-11:00pm *	Registration	Foyer with 1 table, 4 chairs and electric	
8:00am-5:00pm	Workshop	Classroom for 60 (2 per 6 feet)	
Noon-1:00pm	Lunch	Rounds of 8 for 64	
6:00pm-7:30pm	Reception (cash bar)	Flow for 120	
<b><i>Tuesday, July 11, 2006</i></b>			
7:00am-11:00pm *	Storage	Small lockable storage area	
7:00am-11:00pm *	Registration	Foyer with 1 table, 4 chairs and electric	
7:00am-8:30am	Breakfast	Rounds of 8 for 120	
8:00am-5:30pm	General Session	Classroom for 150 (2 per 6 feet)	
8:00am-5:30pm	Breakout Meetings (4)	Conference for 30 each	
Noon-1:30pm	Lunch with slide show	Rounds of 8 for 120	
<b><i>Wednesday, July 12, 2006</i></b>			
7:00am-11:00pm *	Storage	Small lockable storage area	
7:00am-11:00pm *	Registration	Foyer with 1 table, 4 chairs and electric	
7:00am-8:30am	Breakfast	Rounds of 8 for 120	
8:00am-5:30pm	General Session	Classroom for 150 (2 per 6 feet)	
8:00am-5:30pm	Breakout Meetings (4)	Conference for 30 each	
Noon-1:30pm	Lunch with slide show	Rounds of 8 for 120	
<b><i>Thursday, July 13, 2006</i></b>			
7:00am-3:00pm	Storage	Small lockable storage area	
7:00am-11:00pm	Registration	Foyer with 1 table, 4 chairs and electric	
7:00am-8:00am	Continental Breakfast	Rounds of 8 for 120	
8:00am-Noon	General Session	Classroom for 150 (2 per 6 feet)	

\* (24 hour basis)

#### AUDIOVISUAL:

ODOT expects to provide laptops and projectors for the meeting spaces. Advise if the property has high-speed data lines (wired or wireless) in the meeting spaces, sleeping rooms, and lobby/public areas and associated costs. Please advise if any rooms proposed for events of 30 people or more do not have a built-in sound system, cordless microphones, and large projection screens. Please provide the current pricelist (by email if possible), tax, and service charge percentages. Please advise if there are additional charges or inventory limitations for sign easels or other equipment not shown on your price list. If there is a charge for sign easels, ODOT would like to receive 10 complimentary.

**TRANSPORTATION:**

**Complimentary shuttle service to and from the Columbus International Airport is preferred.** Typical cab fares between the airport and property should be noted as well as the proximity and availability of other modes of transportation to and from the airport and to and from surrounding attractions.

It is anticipated that many attendees will drive in from the region so adequate and reasonable parking is an important factor. Please advise on parking availability and rates. If there is a charge for parking (self-parking and/or valet), please state what it is and ODOT would appreciate three complimentary spaces. Group discounted parking would be desirable.

**PROPOSALS:**

Proposals should provide **meeting space floor plans, capacity charts, and tentative meeting room names. The meeting space names blocked must be provided or the proposal will not be considered—this is one of the most important considerations.**

Contracts should include an *ADA* clause and the *Force Majeure* clause should include acts of terrorism. Contracts should not include an indemnification clause and any cancellation, and/or successors and assigns clauses, must be reciprocal. As to attrition clauses, ODOT cannot pay for *sleeping room attrition* and cannot agree to *arbitration* for dispute resolution. ODOT will only agree to a *food and beverage minimum* and a schedule of reasonable meeting *room rental fees* if the sleeping rooms blocked are not realized beginning at no more than 80% pickup. Guest rooms booked outside the block should be credited toward our pickup. ODOT cannot agree to any cancellation clauses that include a cancellation fee or liquidated damages. Contractors shall agree to execute the attached addendum to their standard terms and conditions.

If there are charges for shipment receiving and handling, we would appreciate having the group shipment (up to 10 boxes) handled at no charge.

Meeting attendees are expected from every state, including Puerto Rico and the District of Columbia. For many guests this will be their first visit to central Ohio, so we would like to make this experience as memorable as possible. Please advise on local attractions and entertainment, including restaurants, shopping, cultural and historic, noting distances from the property.

Please advise if construction, renovation and/or refurbishing of the property are anticipated during or within three months of the proposed dates. Also advise what other groups will be at the hotel during our dates. ODOT would like to establish Master Account billing privileges and usually has any deposit requirements waived. Please advise if discounts are available for speedy payment, otherwise ODOT can agree to pay undisputed charges within 30 days. The contract authorized signature block should contain "Gordon Proctor, Director FOR Ohio Department of Transportation".

Please submit proposals (email preferred) by **November 4, 2005** to:

Monique R. Evans, P.E.  
Administrator  
Ohio Department of Transportation  
Office of Research and Development  
1980 West Broad Street  
Columbus, OH 43223

**email preferred:** [research@dot.state.oh.us](mailto:research@dot.state.oh.us)

P.S. Please DO NOT distribute this lead to ancillary vendors.

**ADDENDUM TO CUSTOMER SERVICE AGREEMENT**

To the extent allowed by the laws of the State of Ohio and subject to the additional terms and conditions set forth below, the State of Ohio, Department of Transportation, agrees to the terms and conditions set forth in \_\_\_\_\_ Corporation's Agreement. Additionally, \_\_\_\_\_ and the State agree that the following terms and conditions shall be incorporated into and form a part of the agreement to which they are attached (the "Agreement") for all purposes:

**Non-Appropriation and OBM Certification**: Performance by ODOT under this agreement may be dependent upon the appropriation of funds by the Ohio General Assembly. Therefore, in accordance with Section 126.07 of the Ohio Revised Code, it is understood that ODOT's funds are contingent on the availability of such lawful appropriations by the Ohio General Assembly. If the Ohio General Assembly fails at any time to continue funding for the payments due hereunder, this Agreement is hereby terminated as of the date that the funding expires without further obligation of ODOT.

**Term**: Notwithstanding any renewals, automatic or otherwise, provided in the attached agreement, the agreement shall terminate as of, and shall not extend beyond, the current budget biennium ending June 30, 2007. Any renewals of this agreement beyond the current biennium shall be by separate addendum.

**Taxes**: ODOT is exempt from federal excise taxes and all state and local taxes, unless otherwise provided herein. ODOT does not agree to pay any taxes on commodities, goods, or services acquired from any Contractor.

**Interest**: Section 126.30 of the Ohio Revised Code may be applicable to this Agreement and, if so, requires payment of interest on overdue payments for all proper invoices. The interest charge shall be at a rate per calendar month which equals one-twelfth of the rate per annum prescribed by Section 5703.47 of the Ohio Revised Code.

**Insurance**: The State of Ohio is self-insured.

**Equal Employment Opportunity**: Contractor agrees that it is in compliance with the requirements of Ohio Revised Code Section 125.111.

**Governing Law**: This Agreement shall be governed, construed, and interpreted in accordance with the laws of the State of Ohio. To the extent that ODOT is a party to any litigation arising out of, or relating in any way to, this Agreement or the performance thereunder, such an action shall be brought only in a court of competent jurisdiction in Franklin County, Ohio.

**Drug-free Workplace**: Contractor agrees to comply with all applicable state and federal laws regarding drug-free workplace. Contractor shall make a good faith effort to ensure that all employees, while working on state property, will not purchase, transfer, use or possess illegal drugs or alcohol or abuse prescription drugs in any way.

**Ohio Ethics Law**: Contractor agrees to adhere to the requirements of Ohio Ethics law as provided by Section 102.04 of the Ohio Revised Code.

**Ohio Election Law**: Contractor affirms that, as applicable to it, no party listed in Division (I) or (J) of Section 3517.13 of the Ohio Revised Code or spouse of such party has made, as an individual, within the two previous calendar years, one or more contributions totaling in excess of \$1,000.00 to the Governor or to his campaign committees. **Workers' Compensation**: Contractor shall provide its own workers' compensation coverage throughout the duration of the contract and any extensions thereof. ODOT is hereby released from any and all liability for injury received by the contractor, its employees, agents, or subcontractors, while performing tasks, duties, work, or responsibilities as set forth in this contract.

**Indemnification and Hold Harmless**: Requiring ODOT to indemnify and hold harmless or pay attorney's fees to Contractor, do not meet the requirements of state law, therefore, ODOT does not agree to be bound by such a provision.

**Entire Agreement; Modifications**: The Agreement and this Addendum supersede all prior agreements, written or oral, between Contractor and ODOT and shall constitute the entire Agreement and understanding between the parties with respect to the subject matter hereof. The Agreement and this Addendum and each of its provisions shall be binding upon the parties and may not be waived, modified, amended, or altered except by a writing signed by ODOT and Contractor.

**State Audit Findings**: Contractor affirmatively represents to the State that it is not subject to a finding for recovery under R.C. 9.24, or that it has taken the appropriate remedial steps required under R.C. 9.24 or otherwise qualifies under that

section. Contractor agrees that if this representation is deemed to be false, the contract shall be void ab initio as between the parties to this contract, and any funds paid by the State hereunder shall be immediately repaid to the State, or an action for *recovery* may be immediately commenced by the State for recovery of said funds.

**Addendum Controlling:** In the event there is a conflict between the terms and conditions of the Agreement and this Addendum, this Addendum is controlling.

Corporation: \_\_\_\_\_

State of Ohio  
Department of Transportation:

\_\_\_\_\_

\_\_\_\_\_

Title: \_\_\_\_\_

Gordon Proctor, Director:

Date: \_\_\_\_\_

Date: \_\_\_\_\_



**Appendix D**

June 29, 2006

**THE HILTON COLUMBUS AT EASTON  
SLEEPING ROOM AND CATERING CONTRACT**

**ORGANIZATION:** Ohio Department of Transportation  
**FUNCTION NAME:** Ohio Department of Transportation  
**ARRIVAL:** Sunday, July 9, 2006 **DEPARTURE:** Friday, July 14, 2006  
**CONTACT:** Ms. Monique R. Evans  
**ADDRESS:** 1980 West Broad Street  
**CITY:** Columbus **STATE:** OH **ZIP:** 43223  
**TELEPHONE:** 614-728-6048 **FAX:** 614-995-7047  
**EMAIL:** monique.evans@dot.state.oh.us

**SALES MANAGER:** Kevin Boggs **TELEPHONE:** 614-416-8406 **FAX:** 614-416-8444

The Hilton Columbus is pleased to offer this contract to your organization/group.

**GUEST ROOM COMMITMENT**

	Sun 07/09	Mon 07/10	Tue 07/11	Wed 07/12	Thu 07/13
Presidential Suite	0	1	1	1	0
Standard-King	35	74	74	74	25
Standard-Double	15	25	25	25	5

**RATES**

Room	Single Rate	Double Rate
Presidential Suite	Comp	Comp
Standard-King	149.00	149.00
Standard-Double	149.00	149.00

Rates quoted are net non-commissionable.

Rates are subject to all applicable taxes. Current taxes include 6.75% Ohio State and 10% Local Sales Tax and are subject to change.

The Hilton Columbus is fully accessible and has 18 accessible guest rooms.

**COMPLIMENTARY ROOMS**

For every fifty sleeping rooms occupied cumulatively, we will provide one complimentary room night. Based on the pick up of (200) cumulative paid room nights, the HILTON COLUMBUS is pleased to provide the following: The Presidential suite on a complimentary basis the nights of Monday July 10- Wednesday July 12, 2006.

Also airport shuttle service from 6am to 11pm and parking will be complimentary.

**RESERVATIONS**

Reservations will be made by the individual. We require a first night room and tax deposit with each individual reservation. Reservations must be made by **6/18/2006**. After this date, we will release rooms not picked up out of your room block for general sale. **Individuals canceling reservations must do so by 4PM the day prior to their scheduled arrival date, or it will result in a charge of one night's room and tax to the individuals credit card.**

We will do our best to accommodate reservation requests for additional rooms after the cut off date. If rooms are still available, reservations will be accepted at the prevailing rack rate. If you have additional requests for reservations once the contracted room block is filled, we will accept request on a space available basis at the prevailing rack rate.

**CHECK IN /CHECK OUT TIMES**

Guest check in is 4:00 P.M. Guest check out is 12 noon. Requests for late checkouts should be directed through the Front Office. For your convenience, at check out we can arrange for a baggage holding area to keep your luggage until departure.

**EARLY DEPARTURE POLICY**

Currently, the Hilton Columbus is charging an Early Departure fee of \$50.00 to any guest whom checks out of the hotel before their stated departure date. Guests will have the opportunity to change their departure date at check in without being assessed the fee. Any changes resulting in early departure after check in, will result in the Early Departure Fee being assessed to the guest.

**FUNCTION AND MEETING NEEDS**

Date	Start Time	End Time	Function	Setup	Agr	Room Assigned
7/9/06	8:00 AM	12:00 AM	Storage	Existing		Magnolia
7/10/06	7:00 AM	11:00 PM	Registration	Registration Tables		Easton Foyer E
7/10/06	8:00 AM	12:00 AM	Storage	Existing		Magnolia
7/10/06	8:00 AM	5:00 PM	Meeting	Classroom (2/6)	60	Easton A
7/10/06	8:00 AM	5:00 PM	Exhibit booths	Exhibits - table top 6'		Easton Foyer A/B
7/10/06	12:00 PM	1:30 PM	Lunch	Rounds of (8)	64	Easton B
7/10/06	6:00 PM	7:30 PM	Reception	Rounds of (10)	120	Easton B
7/11/06	7:00 AM	8:30 AM	Continental Breakfast	Rounds of (8)	120	Easton B
7/11/06	7:00 AM	11:00 PM	Registration	Registration Tables		Easton Foyer E
7/11/06	8:00 AM	12:00 AM	Storage	Existing		Magnolia
7/11/06	8:00 AM	5:00 PM	Exhibit booths	Exhibits - table top 6'		Easton Foyer A/B
7/11/06	8:00 AM	5:30 PM	Break Out	Conference	30	Easton C
7/11/06	8:00 AM	5:30 PM	Break Out	Conference	30	Easton D
7/11/06	8:00 AM	5:30 PM	Meeting	Classroom (2/6)	150	Easton A
7/11/06	8:00 AM	5:30 PM	Break Out	Conference	30	Easton E
7/11/06	8:00 AM	5:30 PM	Break Out	Conference	30	Juniper A
7/11/06	12:00 PM	1:30 PM	Lunch	Rounds of (8)	120	Easton B
7/12/06	7:00 AM	8:30 AM	Continental Breakfast	Rounds of (8)	120	Easton B
7/12/06	7:00 AM	11:00 PM	Registration	Registration Tables		Easton Foyer E
7/12/06	8:00 AM	12:00 AM	Storage	Existing		Magnolia
7/12/06	8:00 AM	5:00 PM	Exhibit booths	Exhibits - table top 6'		Easton Foyer A/B
7/12/06	8:00 AM	5:30 PM	Meeting	Classroom (2/6)	150	Easton A
7/12/06	8:00 AM	5:30 PM	Break Out	Conference	30	Easton C
7/12/06	8:00 AM	5:30 PM	Break Out	Conference	30	Easton D
7/12/06	8:00 AM	5:30 PM	Break Out	Conference	30	Easton E
7/12/06	8:00 AM	5:30 PM	Break Out	Conference	30	Juniper A

7/12/06	12:00 PM	1:30 PM	Lunch	Rounds of (8)	120	Easton B
7/13/06	7:00 AM	8:30 AM	Continental Breakfast	Rounds of (8)	120	Easton B
7/13/06	7:00 AM	3:00 PM	Registration	Registration Tables		Easton Foyer E
7/13/06	8:00 AM	12:00 PM	Meeting	Classroom (2/6)	150	Easton A
7/13/06	8:00 AM	3:00 PM	Storage	Existing		Magnolia

**Program Notes:** The above represents our current understanding of your agenda. Please review it carefully and notify us as soon as possible of any discrepancies, as it is being used to protect the appropriate amount of meeting and function space.

**CONTRACTED FUNCTION SPACE CANCELLED OR REDUCED SIX MONTHS OR LESS BEFORE YOUR ARRIVAL DATE WILL RESULT IN A CHARGE EQUAL TO 100% OF THE ROOM RENTAL NORMALLY ASSESSED FOR THE SPACE RELEASED.**

#### **(Option)**

Meeting room rental will be waived with a minimum of \$13,000.00 in food revenue.

	Expected # of Covers	Minimum Estimated Pricing	Anticipated Group Charge
# Continental Breakfasts	360	\$11.95 per person	\$4302.00
# Luncheons	304	\$17.50 per person	\$5320.00
# Receptions-Food Only	120	\$15.00 per person	\$1800.00
# Coffee Breaks	240	\$8.50 per person	\$2040.00
# Beverages-Alcohol		Cash Bar	Cash Bar
Set up Service Fee		\$500.00 (one time charge)	

**ALL CATERED FOOD, BEVERAGE AND AUDIO-VISUAL CHARGES ARE SUBJECT TO 15% TAXABLE SERVICE CHARGE AND CURRENT STATE SALES TAX OF 6.75%.**

Your guaranteed number of persons attending each event is due seventy-two (72) hours prior to the event. This number may be increased but may not be decreased. The hotel prepares 5% above your guarantee. Should a guarantee not be received, the hotel will prepare and charge for the original confirmed estimated number of attendees.

#### **TOTAL REVENUE**

Total Food, Beverage and Room Rental Revenue: \$13,462.00

#### **FOOD AND BEVERAGE**

Food and beverage is not permitted to be brought into and/or removed from the Hotel's function rooms. Our liquor license requires that any alcoholic beverage dispensed is by the employees and bartenders of the HILTON COLUMBUS. The hotel reserves the right to refuse alcoholic beverages to any individual and to require proof of identification before serving an individual.

Our menu's offer a variety of items for you to select from. If you would care to offer your guests a choice of 2 entrees for a plated or served lunch or dinner, we will be pleased to accommodate this request for an additional \$2.50 per person per entrée.

#### **MEETING/BANQUET ROOM RENTAL**

Based on your anticipated guest room utilization and the number of group food and beverage functions you intend to host, we have waived the room rental charges for the meeting facilities required for your program.

### **IN-HOUSE EQUIPMENT**

**We will provide, at no charge, a reasonable amount of meeting equipment, i.e., chairs, tables, candy, water pitchers pen, note pads etc.** This does not include special set-ups of an extraordinary format that would exhaust our in-house equipment to the point of having to rent additional supplies to accommodate your needs. If such is the case, we will inform you of the rental cost to your group for the additional supplies. **The Hilton Columbus will provide a radio to the group contact for communication with our banquet staff during the hours of the meeting. The Hilton will also provide up to 10 complimentary sign easels during the meeting. ADDITIONAL CHARGES ARE APPLICABLE FOR EACH 6' TABLETOP EXHIBIT TABLE.**

**A \$35.00 fee is applicable per each 6' table with a linen cloth. (Includes a linen tablecloth.)**

**ADDITIONAL CHARGES ARE APPLICABLE WHEN A CHANGE IN SETUP OF MEETING SPACE OCCURS AND AFTER BANQUET EVENT ORDERS HAVE BEEN APPROVED AND AUTHORIZED BY THE CLIENT. FINAL CHARGES WILL BE DETERMINED ON EACH CHANGE AND ON EACH MEETING ROOM BY THE CATERING AND/OR BANQUET MANAGER.**

### **PATRON'S MATERIALS**

*All proposed banners, signs, displays and/or decorations must be approved by hotel management prior to arrival and are to be placed only at the discretion of the Hotel. Such items will not be placed in public areas, the main lobby of the hotel or on the Hotel grounds and will only be allowed in designated meeting room areas.* Personal property of the Patron, Patrons guests, or invitees brought onto the hotel premises and left therein, either prior to or following the Event, will be at the sole risk of Patron and the Hotel will not be liable for any loss or damage to this property for any reason. Patron acknowledges that Hotel, the Hilton Corporation, and owner do not maintain insurance covering Patron's property and that is the sole responsibility of Patron to obtain business interruption and property damage insurance covering such losses by Patron.

### **SHIPPING AND RECEIVING OF PACKAGES**

*Due to limited securable storage facilities, The Hilton Columbus will accept packages for your event **three (3) days** prior to the start of your event **7/9/2006 12:00:00 AM**. All item(s) shipped **MUST BE** marked with the name of your group/event or exhibitor, on site contact name from group/exhibitor and event date. **A fee of \$20.00 per box and \$125.00 per skid will be charged to your group's master account for storage, handling and delivery of the items to your meeting area on the date of your event.***

*All items must be shipped out on the last day of your event. The contact or exhibitor must provide shipping labels for items and is responsible for all shipping charges. Shipping charges will not be accepted by the hotel. Hotel personnel required to assist in loading your shipment for departure will incur the \$20.00 per box and \$125.00 per skid charge. These charges will be applied to your master account.*

*The Ohio Department of Transportation will not be charged for the first 10 boxes received for their meeting materials.*

**Exhibits and Exhibitors:** By the signature below I certify that I have advised participants and my staff that nothing is to be affixed to any walls, ceilings or fixtures in the exhibit area(s). Any excessive waste removal fees incurred by the Hotel will be added to the Patron's Master Account at current rates. **REQUESTS FOR ELECTRICAL OUTLETS, ADDITIONAL AMPERAGE, ETC., MUST BE APPROVED BY THE CHIEF ENGINEER OF THE HILTON COLUMBUS PRIOR TO ARRIVAL.** Additional charges for electrical needs and/or phone lines will be applied to your master account.

### **MINORS**

Any minor children (under the age of 21) using the hotel facilities must be under the supervision of the person signing this contract. Unaccompanied minors must remain in the designated function space (except for the nearest restroom facility). The person signing the contract or their designated on site contact assumes full responsibility for their guests conduct and may be requested by a member of hotel management to remove anyone not complying with hotel rule.

### **BILLING PROCEDURES**

*Please initial beside the appropriate method of payment and provide all necessary information to process your payment method.* Please keep in mind when choosing Direct Billing as your method that this is a request and not a guarantee of approval. You will be notified should the Hilton Columbus be unable to extend Direct Billing privileges so that you can provide an alternative method of payment prior to your event. Please keep in mind that for direct billing privileges to be established, your group's initial function must total a minimum of \$2,500.00 or more in hotel charges.

<b>CHARGES TO BE BILLED TO MASTER ACCOUNT (Please check all that apply)</b>	
<i>All Charges</i> <input type="checkbox"/>	<i>Incidentals</i> <input type="checkbox"/>
<i>Room &amp; Tax</i> <input type="checkbox"/>	<i>Other (specify)</i> <input type="checkbox"/>
<i>Banquet / Meeting Room</i> <b>X</b>	<i>Catering</i> <b>X</b>
<i>Individuals Pay for Own Sleeping Room</i> <b>X</b>	
<b>Tax Exempt</b>	<b>Yes X No <input type="checkbox"/> (If yes, we must receive Certificate of Exemption)</b>

**Payment Prior to Arrival**

The Estimated charges for the aforementioned event must be paid in full (72) hours prior to the arrival date. The Hilton Columbus will accept Cash, Check, or Money Order. Please be sure to reference the function name and arrival date on all payment methods so that the appropriate account can be credited.

**Credit Card**

The Estimated amount of your bill will be held in the form of an authorization on the credit card 72 hours prior to your event.

I authorize the Hilton Columbus to bill the following credit card for the indicated charges during the aforementioned event.

Type of credit Card \_\_\_\_\_ Credit Card # \_\_\_\_\_ Ex. \_\_\_\_\_

Card Holders Name (Print) \_\_\_\_\_

Cardholder Signature \_\_\_\_\_

**X Direct Billing**

**Direct Billing must be arranged prior to your arrival date. In order to request a Direct Billing Account, you must provide our Accounting department with the following information.**

<i>Name of Company</i>	<i>Ohio Department of Transportation</i>		
<i>Billing Address</i>	<i>1980 West Broad Street</i>		
<i>City</i>	<i>Columbus</i>	<i>State</i>	<i>Ohio</i>
			<i>Zip 43223</i>
<i>Name of Contact:</i>			

**Hotel References (Please see attachment)**

<i>Name of Hotel:</i>			
<i>Address</i>			
<i>City</i>	<i>State</i>	<i>Zip</i>	
<i>Name of Contact:</i>	<i>Phone:</i>		
<i>Dates</i>	<i>Amount</i>		

**Bank References**      *N/A*

---

*Name of Bank*

---

---

*Address*

---

---

*City*

---

---

*State*

---

---

*Zip*

---

---

*Name of Contact:*

---

---

*Phone:*

---

---

*Account #*

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I am authorized to sign on behalf of Ohio Department of Transportation. Terms are net 30 days from **Friday, July 14, 2006**. A service fee of 1.5% per month (18% per annum), **subject to the limits of the Ohio Revised Code**, will be assessed each month there after if the balance is not paid in full. By signing below, I authorize all references (Bank & Hotel) to release the information requested by the Hilton Columbus in order to be evaluated and considered for Direct Billing privileges.

---

*Name and Title (please print):*

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*Signature*

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*Please remember a request for Direct billing privileges is not a guarantee of approval. If your application is declined, or the requested information is not provided, then you will be asked to provide an alternative method of payment prior to arrival. If your organization is tax exempt you must submit a copy of your tax exemption certificate. Should we not receive this certificate prior to your event(s), all applicable taxes will be added to your total charges.*

**ADVANCE DEPOSIT**

In order to hold your room block and meeting space on a definite basis, we require a good faith deposit in the amount of **\$1000.00** upon confirmation. This good faith deposit will be applied to your final master bill. **Please include a check or money order with your signed contract. If a deposit is not possible, a purchase order will be accepted in the amount of the anticipated final master bill.**

**If you wish to make your advance deposit via Credit Card, simply fill out the information below and return a copy of the front and back of your credit card with the signed contract.**

Type of credit Card \_\_\_\_\_ Credit Card # \_\_\_\_\_ Ex. \_\_\_\_\_

Card Holders Name (Print) \_\_\_\_\_

Card Holder Signature \_\_\_\_\_

**CANCELLATION CLAUSE**

The performance of this agreement by either party is subject to acts of God, wars, government regulation, or government statement of policy which limit, prohibit or suggest curtailment of transportation facilities, disaster, acts of terrorism, strikes, or civil disorders making such performance illegal or impossible. The agreement may be terminated for any one or more of such reasons by written notice from one party to the other. If such termination occurs prior to the first arrival date, the HILTON COLUMBUS shall refund all deposits. If termination occurs after the first arrival date, the deposit shall be refunded on a pro-rata basis.

In the event of a cancellation of the entire program, for the reasons other than outlined above, your organization agrees to pay the HILTON COLUMBUS the sum outlined as follows in damages:

- All provisions in the Addendum provided by ODOT have been agreed upon and will apply to this contract.

**Meeting room Rental sliding scale**

Reduction in the room block by 20% or more and after the agreement of the terms of this agreement, will result in a charge to the contracting organization.

Above 304 room nights	No charge
303- 275 room nights	\$500.00 per day
274-235 room nights	\$1000.00 per day
Below 235 room nights	\$1500.00 per day

**ADDENDUM TO CUSTOMER SERVICE AGREEMENT**

To the extent allowed by the laws of the State of Ohio and subject to the additional terms and conditions set forth below, the State of Ohio, Department of Transportation, agrees to the terms and conditions set forth in **The Hilton Columbus** Agreement. Additionally, **The Hilton Columbus** and the State agree that the following terms and conditions shall be incorporated into and form a part of the agreement to which they are attached (the "Agreement") for all purposes:

**Non-Appropriation and OBM Certification**: Performance by ODOT under this agreement may be dependent upon the appropriation of funds by the Ohio General Assembly. Therefore, in accordance with Section 126.07 of the Ohio Revised Code, it is understood that ODOT's funds are contingent on the availability of such lawful appropriations by the Ohio General Assembly. If the Ohio General Assembly fails at any time to continue funding for the payments due hereunder, this Agreement is hereby terminated as of the date that the funding expires without further obligation of ODOT.

**Term**: Notwithstanding any renewals, automatic or otherwise, provided in the attached agreement, the agreement shall terminate as of, and shall not extend beyond, the current budget biennium ending June 30, 2007. Any renewals of this agreement beyond the current biennium shall be by separate addendum.

**Taxes**: ODOT is exempt from federal excise taxes and all state and local taxes, unless otherwise provided herein. ODOT does not agree to pay any taxes on commodities, goods, or services acquired from any Contractor.

**Interest**: Section 126.30 of the Ohio Revised Code may be applicable to this Agreement and, if so, requires payment of interest on overdue payments for all proper invoices. The interest charge shall be at a rate per calendar month which equals one-twelfth of the rate per annum prescribed by Section 5703.47 of the Ohio Revised Code.

**Insurance**: The State of Ohio is self-insured.

**Equal Employment Opportunity**: Contractor agrees that it is in compliance with the requirements of Ohio Revised Code Section 125.111.

**Governing Law**: This Agreement shall be governed, construed, and interpreted in accordance with the laws of the State of Ohio. To the extent that ODOT is a party to any litigation arising out of, or relating in any way to, this Agreement or the performance thereunder, such an action shall be brought only in a court of competent jurisdiction in Franklin County, Ohio.

**Drug-free Workplace**: Contractor agrees to comply with all applicable state and federal laws regarding drug-free workplace. Contractor shall make a good faith effort to ensure that all employees, while working on state property, will not purchase, transfer, use or possess illegal drugs or alcohol or abuse prescription drugs in any way.

**Ohio Ethics Law**: Contractor agrees to adhere to the requirements of Ohio Ethics law as provided by Section 102.04 of the Ohio Revised Code.

**Ohio Election Law**: Contractor affirms that, as applicable to it, no party listed in Division (I) or (J) of Section 3517.13 of the Ohio Revised Code or spouse of such party has made, as an individual, within the two previous calendar years, one or more contributions totaling in excess of \$1,000.00 to the Governor or to his campaign committees.

**Workers' Compensation**: Contractor shall provide its own workers' compensation coverage throughout the duration of the contract and any extensions thereof. ODOT is hereby released from any and all liability for injury received by the contractor, its employees, agents, or subcontractors, while performing tasks, duties, work, or responsibilities as set forth in this contract.

**Indemnification and Hold Harmless:** Requiring ODOT to indemnify and hold harmless or pay attorney's fees to Contractor, do not meet the requirements of state law, therefore, ODOT does not agree to be bound by such a provision.

**Entire Agreement; Modifications:** The Agreement and this Addendum supersede all prior agreements, written or oral, between Contractor and ODOT and shall constitute the entire Agreement and understanding between the parties with respect to the subject matter hereof. The Agreement and this Addendum and each of its provisions shall be binding upon the parties and may not be waived, modified, amended, or altered except by a writing signed by ODOT and Contractor.

**State Audit Findings:** Contractor affirmatively represents to the State that it is not subject to a finding for recovery under R.C. 9.24, or that it has taken the appropriate remedial steps required under R.C. 9.24 or otherwise qualifies under that section. Contractor agrees that if this representation is deemed to be false, the contract shall be void ab initio as between the parties to this contract, and any funds paid by the State hereunder shall be immediately repaid to the State, or an action for *recovery* may be immediately commenced by the State for recovery of said funds.

**Letter of Commitment:** In lieu of an advance deposit, a letter of commitment will be provided to establish a purchase order for the deposit on **July 3, 2006**.

**Addendum Controlling:** In the event there is a conflict between the terms and conditions of the Agreement and this Addendum, this Addendum is controlling.

**ACCEPTANCE**

If these arrangements meet with your organization's approval, please sign and return the enclosed copy by **Friday, November 18, 2005**. In the event the signed copy of this Contract is not received by the specified date, all space will be released.

Upon receiving a signed copy, a mutual confirmation and Contract will exist between **Ohio Department of Transportation** and the **Hilton Columbus**.

If a travel agency, booking service, meeting planner, or other agent executes this Contract, the Agent hereby warrants that is either:

\_\_\_\_\_ (A) acting with the full authority of its principal to bind the principal to this contract.

\_\_\_\_\_ (B) accepting full liability and responsibility for performance of all the obligations contained herein.

If neither is checked, (B) will apply.

ACCEPTED BY:  
**The Hilton Columbus**

ACCEPTED BY ORGANIZATION:  
**Ohio Department of Transportation**

\_\_\_\_\_  
SIGNATURE: Kevin Boggs

\_\_\_\_\_  
BY: Gordon Proctor

\_\_\_\_\_  
TITLE: National Sales Manager

\_\_\_\_\_  
TITLE: Director

\_\_\_\_\_  
DATE:

\_\_\_\_\_  
DATE



## **Appendix E**

### **Information for Negotiating Agreements and Contracts**

#### **Definitions**

Some commonly used terms you should know are:

- **Room block.** The number and type of rooms the hotel will hold in reserve for a client.
- **Room pickup.** The number of rooms actually used by the client
- **Breakouts.** The number of rooms used for concurrent meeting sessions.
- **Rack rates.** The hotel's official posted rates for sleeping rooms.
- **Group rates.** Also known as **net rates**, refers to discounted room prices given to clients responsible for bringing in large amounts of business.
- **Flat rate.** Refers to a single group rate for sleeping rooms for all of your business. This rate may not include suites.
- **Sliding scale of group rates.** Discounted sleeping rooms based on the type of guest rooms (single, double, twin, etc.) that will be used.
- **Full American Plan.** Room rate includes three full meals.
- **Modified American Plan.** Room rate includes breakfast and dinner.
- **European Plan.** No meals are included in the room rate.
- **Food and Beverage.** Includes breakfast, refreshments (i.e. coffee, tea, soft drinks, pastries, snacks, etc.), lunch, receptions and buffets, banquets, cash bars, and generally anything ordered from a menu.

#### **Hotel Power Points**

Hotels use a checklist to tally the points they consider when deciding how attractive your meeting is to them. These points are used to determine room rates, complimentary items and services, etc.

- **Location.** Some cities have a reputation as major convention sites. The attractions of the city are so great that hotels and meeting facilities command higher rates. Smaller cities, known as second-tier or third-tier cities are often attractive sites and offer lower rates. (This is really a power point of the site rather than your meeting.)
- **Meeting months.** For many sites, April, May, September, and October are popular meeting months. For some resort sites, the summer months are most popular. Meeting around, rather than during, a site's peak season often means a lower available rate.
- **Food and beverage use.** Groups that use a hotel's food and beverage service are much more attractive than those that do not. The more services you use, the more attractive your group is.
- **Sleeping rooms/meeting rooms ratio.** A group that uses all of the hotel's sleeping rooms usually will be offered all of a hotel's meeting rooms. Using fifty percent of a hotel's sleeping rooms may mean that all of the hotel's meeting space may not be available to you. The reason for this is that if you were to use all of the hotel's meeting space and not all of its sleeping rooms, your use of all of the meeting space would hamper the hotel's ability to sell the other sleeping rooms. But be aware of hotels that have a disproportionate number of sleeping rooms to meeting space; they can present a lose-lose situation for you. If you use all the sleeping rooms in this type of hotel, there may not be enough break-outs or meeting space for your group. If you don't use a high percentage of the sleeping rooms, all the meeting rooms won't be available to you.
- **Low cancellation history.** Meetings with a history of few no-shows and cancellations make points with hotels.

- A review of these points will help you determine the value of your meeting, which is the key factor in negotiating an agreement.

### Elements of an Agreement

Each hotel or meeting facility has its own contract requirements, and clients have certain requirements too. Most elements of the contract are standard, however. To help you fashion an agreement that is suitable to your meeting, following is a list of items commonly used in hotel contracts and agreements:

### Identification of Hotel and Group

- Name of hotel and address.
- Name of client and address.
- Client's contact person and title.
- Name of function or meeting title.
- Official dates of meeting, arrival and departure dates plus early and late requirements.
- Anticipated number in attendance.

### Guest Room Commitment

- **Room block** specifies the number and types of guest rooms reserved for your group by the hotel.
- **Sample Block Form**

	Sun 07/09	Mon 07/10	Tue 07/11	Wed 07/12	Thu 07/13
Presidential Suite	0	1	1	1	0
Standard-King	35	74	74	74	25
Standard-Double	15	25	25	25	5

- The **cutoff date** indicates the date up to which the hotel will hold the room block at the group rate. Usually, the hotel will continue to accept reservations at the group rate after the cutoff date on a space available basis; however, it is a negotiable point and it should be clarified in the contract.
- The **reservation procedure** contains all the details on how the hotel will handle reservations. The group may direct all attendees to make reservations with the hotel, the group may submit a rooming list, or the group may use printed reservation cards.
- **Check-in** and **check-out** times.
- **Incidental and personal charges** commonly are the responsibility of each guest except as otherwise directed in writing by the group. Be sure to identify key personnel such as speakers, staff, and VIPs whose charges may go on the master account.
- **Complimentary rooms** usually are offered by the hotel on a "one for 50" basis, that is, the 51st room is free. Be specific on how this will be calculated. It is to your group's advantage to have complimentary rooms calculated on a cumulative basis. That is, you should receive each complimentary room as the room pickup increases, calculated by adding all rooms booked by attendees for premeeting, meeting, and postmeeting dates. Complimentary rooms should not be calculated based on only those nights with a pickup of 50 or more rooms. Additionally, hotels may offer complimentary or discounted staff and VIP rooms. Suites, room upgrades, complimentary cocktail receptions or coffee breaks, etc., can also be negotiated.
- A **walking** provision refers to the hotel's responsibility in the event that it fails to honor the reservation of any confirmed guest. It is not unreasonable for a group to demand free lodging at an equivalent or better hotel plus transportation for "bumped" attendees at the expense of the

hotel. Other arrangements may be acceptable, such as free lodging one night and a return to the hotel on the second night.

- A **room guarantee** provision indicates the party responsible for room guarantees, the cancellation policy, and any special requests, such as holding rooms for late arrival beyond the hotel's normal cancellation time.

### **Rates, Fees, and Charges**

- **Guest room rates** are usually **confirmed** in advance.
- **Rate cap** provisions are important. They ensure that the meeting room rates offered to you by the hotel will not be greater than the lowest rate offered through any other promotional packages during the meeting dates, and they ensure the rates will not increase.
- The **staff room** provision indicates what has been negotiated for staff rooms, such as discounted rates or complimentary services. Be specific in stating the number of staff rooms required each night.
- A **family plan** indicates the hotel's policy on charges for children staying with parents. Many hotels offer no charge for children under 18 years of age when they stay in their parent's room.
- **Pre-meeting and post-meeting rates** indicate how many days before and after the meeting the group rate applies.
- The **gratuities** provision indicates any special arrangements for gratuities for hotel services. Gratuities may be at the discretion of the guest, or agreements may indicate that the guest shall not provide gratuities for valet parking, bell persons, etc.
- **Incidental charges** indicate charges and fees for services such as parking, shuttles, and recreational facilities. Be sure that these charges do not exceed the "norm." The contract should specify current charges for fees that are paid by guests.

### **Billing and Credit Arrangements**

- Hotels usually establish a **master account** for a group subject to a review of creditworthiness. Should credit not be approved, other arrangements for advance payment will be made.
- **Direct billing** for the master account is usually established by completing a form that indicates the entity, address, and name and title of the contact person who will be responsible for payment.
- **Master account authority** indicates specific individuals authorized to make charges to the master account.
- Consider including a **daily review** provision in which the group and the hotel each designate a representative to review charges to the master account at the end of each day or on the following day.
- The **payment date** provision indicates the timeframe, usually 30 days after receipt of invoice, in which the client shall pay for undisputed charges to the master account. When discrepancies or errors occur, the hotel usually rebills the client and payment is made within another 30-day period.
- **Payment of master account** at check-out can provide discounts off your final bill. Inquire about this option.
- **Credit cards** are commonly requested at check-in for guests who will be responsible for their own incidentals or room charges. The agreement should indicate which credit cards will be accepted by the hotel.

### **Function Information**

- A **function information sheet** or **function space assignment sheet** will indicate a hotel's understanding of your meeting requirements. Hotels can only guarantee space for what you agree to, so be sure all your meeting requirements are addressed.
- Meeting **room rental charges** are negotiable. Charges, if any, should be spelled out in the original agreement. Specify room setup charges, if any, or charges to reset meeting rooms.
- **Complimentary space** and **setup** details are important to specify in the agreement to avoid any unexpected charges for room use or setups requested by the group. Complimentary pads, pencils, water, candy dishes, microphones, easels, blackboards, etc., should be included here. Any complimentary items should be noted in the contract.
- The agreement should specify all **meeting services** provided by the hotel for which there is a cost to the group, i.e., electricians, security, exhibit table setups, resetting rooms, faxes, etc.
- The hotel's **sign policy** specifies what is and is not permitted and should be noted in the agreement. Usually hotels permit an easel or a special sign holder outside each function room and directional signs at stairways, elevators, and in the lobby.
- A reassignment of **function space** provision should state that the hotel shall not reassign any function space committed to the group without the group's prior approval. Be sure to have the room names specified in the agreement and obtain a floor plan that includes those names. This will help to ensure the space you toured and thought you were getting is the space you actually receive.
- **Final programs** reflecting expected attendance figures and functions are required by hotels, usually two to six months in advance of the meeting date. Thereafter, hotels may release space not committed to use by the group after a notice of intent to release space is provided to the group.

### **Exhibit Requirements**

You may or may not require exhibit space. If you do, the following items should be included in your agreement:

- **Assigned exhibit space.** Include location and any limits on size, weight, types, or number of exhibits. It's an advantage to have an exhibit area in which food is served or sold, and to have open space between your exhibit and registration area and that of other hotel patrons.
- **Charges for exhibit space.** Exhibit space may be complimentary; it's negotiable.
- **Setup and dismantle dates.** Indicate the times your group will have access to the space for setup and the date and time for dismantling exhibits. Clearly state the times the exhibit areas may be open and when the area needs to be cleared.
- **Utilities available.** Include what's available (electricity, lighting, gas, compressed air, water, drains, etc.) and any charges or limitations.
- **Storage and security.** Include arrangements for storage, storage limitations, access to storage area, and security arrangements.
- **Materials.** Include specifications for who is responsible for getting materials to the exhibit space.

### **Pre-meeting Shipping**

Frequently it is necessary to ship materials to the meeting site in advance of the meeting. Your agreement should specify how materials should be packed and marked, to whom materials should be sent, and that such materials will be stored in a secured location.

**Meeting Coordinators**

The hotel should designate a specific person or persons who will handle meeting room setups, menu selections, audiovisual needs, sleeping room requirements, and all other aspects of the group's program. The agreement should have a date by which the designated person(s) will contact the group to review all the program needs.

**Food and Beverage**

- **Specific functions** should be listed, such as the number of breakfasts, lunches, dinners, coffee breaks, cocktail receptions, etc., that you plan to hold; the day and date for each function; and the estimated attendance for each function. Hotel policies will determine how many days in advance the group must give a minimum guarantee of the number of people who will attend each function. Hotels usually set for up to five percent over the guaranteed minimum; the specific percentage as directed by the group should be included in the agreement.
- **Confirmed prices** for all catered meals should be listed. At the minimum, a cap could be put on all food and beverage prices and exact charges could be provided to the group at an acceptable time in advance of the meeting (three to nine months).
- State the **date** by which the group must **specify choice** of menus, beverages, etc., and confirmed prices.
- **Gratuities or service charges** required for all food and beverage should be stated. Some states limit the amount of gratuity. Be sure to check the gratuity rate specified by the hotel for items on the Master Account. This should not be overlooked, because the gratuity is how hotels pay their service staff. If they require a 20% gratuity but you can only authorize payment for 15% they may be willing to charge you a one-time setup fee to make up the estimated difference.
- **Federal, State, and local taxes** should be clearly stated.

**Americans with Disabilities Act Compliance**

Hotels in the United States and its territories are required under the Americans With Disabilities Act (ADA) to make their facilities and services accessible to persons with disabilities. The agreement should state that the hotel shall comply with all public accommodations of the ADA, including TTY for hotel reservations.

**Insurance**

The facility and the sponsor's group should agree that each will carry adequate liability and other insurance to protect against any claims arising from any activities conducted in the facility during the meeting.

**Post-meeting Report**

The hotel should agree to provide the group with a meeting report before a certain date after the meeting. The report should include room pickup; the number of singles/doubles, no shows, and cancellations; and food and beverage activity, including room service, restaurant usage, banquet functions, and other food and beverage functions.

**Cancellation Policy**

All agreements should carry a cancellation policy for the protection of both parties. The following are suggested elements of a cancellation policy:

- **Rights to Cancellation.**

**Generally.** The agreement will bind each party, and there shall be no right of termination or right to cancel obligations under this agreement except as otherwise provided herein.

**Uncontrollable events** (*Also known as a Force Majeure clause, which essentially frees one or both parties from liabilities when an extraordinary event beyond the control of the parties, such as flood, war, riots, acts of God, acts of terrorism,* curtailment of transportation facilities, or other emergency makes it inadvisable, illegal, or impossible to perform their obligations under this agreement. Either party may cancel this agreement for any one or more of such reasons upon written notice to the other party.

**Construction/renovation.** In the event that the hotel will be undergoing any construction or renovation during the meeting, the hotel shall promptly notify the group, and the group shall have the right to cancel this agreement without liability upon written notice to the hotel if, in the group's reasonable judgment, such construction or renovation may unreasonably affect the use of the facilities or the quality of service to be provided under this agreement.

**Management changes.**

Option 1: The hotel shall promptly notify the group if there is a change in hotel management prior to the meeting, and the group shall have the right to cancel this agreement without liability upon written notice to the hotel.

Option 2: Neither change of ownership of the hotel nor change of leadership of the group relieves either party of the responsibilities or obligations of this agreement.

**Without liability.** The phrase "without liability" wherever used in this agreement shall be deemed to include a refund by the hotel of all deposits and prepayments made by the group.

- **Cancellation Fee.**

**Assessment and calculation.** In the event of any cancellation of this agreement by the group not otherwise permitted under this agreement, the group shall pay a cancellation fee, not a penalty, to the hotel. This fee shall be a percentage of the peak night's guest room revenue (peak night's room revenue equals the single rack rate less the group's discount multiplied by the number of rooms blocked for the peak night), according to the following schedule:

Notification of Cancellation Percentage of Peak Night's

Prior to Arrival Guest Room Revenue

0-90 days 100 percent

91-180 days 75 percent

181-270 days 50 percent

271-364 days 25 percent

(The actual schedule you use may vary. Factors such as the size of the group may be taken into consideration.)

If the hotel is able to replace this canceled business, the collected amount will be reimbursed to the group, without interest. If only a percentage of the lost revenue is recovered, the difference between this figure and the fee will be reimbursed to the group. In determining whether or not the lost revenue is recouped, all peak night rooms sold after notice of cancellation is given shall be credited to the group. The terms of this section represent the exclusive remedy for unauthorized cancellation of this agreement by the group.

- **Failure by the hotel.** Failure by the hotel to provide the space and/or services as agreed shall render the hotel liable to the group for all direct, indirect, and consequential damages, expenses, attorney fees, and costs incurred by the group on account of such failure. Exercise by the group of any of its rights of cancellation of this agreement shall not waive or otherwise affect this provision.

- **Standard arbitration clause.** Any controversy or claim arising out of or relating to this agreement, or the breach thereof, that cannot be acceptably negotiated by both parties shall be settled by arbitration in accordance with the rules of the American Arbitration Association. Judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof. *(This is a standard clause in most hotel contracts; however, some states like Ohio cannot agree to arbitration, so this was removed from our agreement.)*

**Acceptance**

By Hotel

Acceptance \_\_\_\_\_  
(signature required)

Name of representative

Title

Date \_\_\_\_\_

By Group

Acceptance \_\_\_\_\_  
(signature required)

Name of representative

Title

Date \_\_\_\_\_

**Appendix F****Session Organization Form**

Session Title	Session #	Session Day & Start Time
Organizer Name & Contact Information	Moderator Name & Contact Information	Duration of Session
Objectives/Goals		
Session Synopsis		
Desired Outcomes		
Special Considerations		



Session Title	Session #	Session Day & Start Time
---------------	-----------	--------------------------

<p><i>Please use the following format to list each speaker's presentation:</i></p> <p>Research Processes for the New Millennium (2-2:15 pm)  Jane Smith, President, Research Inc., Columbus, OH  Presentation Description: Provide a 2-3 sentence overview of the presentation.</p>	<p><i>Please list speaker's contact info here.</i></p> <p>Jane Smith, Research Inc., 123 technology St., Columbus, OH 43223; ph. 614-555-1234; f 614-555-1235; smith@researchin.com</p>
A.	A.
B.	B.
C.	C.
D.	D.
E.	E.
F.	F.

**Appendix G**

**Speaker Control Sheet**

Speaker's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: Work \_\_\_\_\_ Home \_\_\_\_\_ Fax \_\_\_\_\_

Organization: \_\_\_\_\_

Event: \_\_\_\_\_ Date of presentation: \_\_\_\_\_ Time: \_\_\_\_\_

Title of presentation: \_\_\_\_\_

Description of Presentation: \_\_\_\_\_

\_\_\_\_\_

Invited by: \_\_\_\_\_ Date confirmed: \_\_\_\_\_

Date confirmation letter sent: \_\_\_\_\_

Travel Arrangements: \_\_\_\_\_

Arranged by: \_\_\_\_\_

Hotel Accommodations: \_\_\_\_\_

Arranged by: \_\_\_\_\_

Honorarium: Yes \_\_\_\_\_ No \_\_\_\_\_ Amount \$

Travel expenses: Yes \_\_\_\_\_ No \_\_\_\_\_ Amount \$

Hotel expenses: Yes \_\_\_\_\_ No \_\_\_\_\_ Amount \$

Per diem: Yes \_\_\_\_\_ No \_\_\_\_\_ Amount \$

Audiovisual aids requested: Yes \_\_\_\_\_ No \_\_\_\_\_ No Reply \_\_\_\_\_

Staff member assigned to greet/accompany to meeting: \_\_\_\_\_

**Appendix H**

**AASHTO RAC Annual Meeting  
Presentation Guidelines**

- ✓ *All* presentations must be in PowerPoint. They can be either mailed on a disk or on a flash drive or e-mailed to Monique Evans, **no later than Monday, June 12, 2006**.

*Ohio Department of Transportation  
Office of Research & Development  
Attn: Monique Evans  
1980 West Broad Street  
Columbus, OH 43223  
research@dot.state.oh.us*

- ✓ Laptop computers will be provided for speakers, and presentations will be pre-loaded by the meeting organizers onto the computers. If you do not submit your presentation by the above deadline we cannot guarantee it will run properly on the day of the event. Furthermore, you will need to bring your presentation on a memory stick since many of the meeting laptops will not have a disc drive. Time will not be available to connect personal laptops for presentations.
- ✓ To ensure presentations appear as they did when they were created, presenters are encouraged to select a font from the following list. Although numerous other fonts may be available and may still work, the following are fairly common fonts. Their use in the presentations significantly reduces the chance of any problems with the appearance of the presentations at the meeting:

- Arial
- AvantGarde
- Book Antiqua
- Century Gothic
- Comic Sans
- Courier
- Courier New
- Futura
- Helvetica
- Impact
- Letter Gothic
- Modern
- Times New Roman
- Verdana

- ✓ Font size on slides should be large enough to be read when reduced for handouts. In no case should it be smaller than 18 points.
- ✓ Avoid colors that cause eye strain and the use of too many special effects such as animated text.

- ✓ Limit the amount of information on your slides. (If you can't clearly read printed handouts that have 3 slides per page, you probably have too much information on your slide.)
- ✓ Please, DO NOT EXCEED YOUR ALLOTTED TIME.
- ✓ If you will be presenting a video or using specialty software, you must submit an Audio-Visual Equipment & Computer Request Form to your session organizer to arrange for a TV and VCR.
- ✓ If you have any questions, contact your session organizer or **Monique Evans at 614-728-6048** or at the above e-mail.
- ✓ Good PowerPoint slides usually make bad handouts and vice versa. PowerPoint slides should guide the speaker and the audience through the presentation. If the speaker doesn't have to say anything to fully convey all the information on the slide then it is probably a good handout and a bad PowerPoint slide. (A general guide is to use no more than 7 lines or 7 words per line on a slide.)
- ✓ Things People Hate or Find Annoying about PowerPoint Presentations:
  - Overly complex diagrams/charts
  - Moving/flying text or graphics
  - Use of full sentences
  - Hard to see colors
  - Too small text
  - Speakers who read the slides
  - Announcements that begin with, "I know you can't read this, but ...."  
(If they can't read it, either fix it or please don't show it.)

## Appendix I

## Sample Budget

**AASHTO RAC 2006 ANNUAL MEETING BUDGET**

Prepared by Monique R. Evans, P.E.  
 Administrator Office of Research and Development  
 Ohio Department of Transportation  
 1980 West Broad St.  
 Columbus, Ohio 43223  
 614-728-6048 voice 614-995-7047 fax  
 monique.evans@dot.state.oh.us

**SUMMARY**

FC: Total Fixed Costs	\$9,683.26
REV: Revenue from sponsorships and donations	\$1,580.50
BEC: Breakeven Costs = FC - REV	\$8,102.76
VCPP: Variable Costs (per person)	\$239.13
<b>Registration Fee (low attendance) = BEC/L + VCPP</b>	<b>\$340.41</b>
<b>Registration Fee (medium attendance) = BEC/M + VCPP</b>	<b>\$320.16</b>
<b>Registration Fee (high attendance) = BEC/H + VCPP</b>	<b>\$303.95</b>

<b>Step 1 - Estimate number of attendees</b>	<b>100</b>
L - Low Estimate	80
M - Medium Estimate	100
H - High Estimate	125

<b>Step 2 - Calculate VARIABLE Costs (Costs that change with the number of attendees)</b>	<b>Base price w/o tip</b>
---	---------------------------

1. Namebadge, holder and lanyards		\$5.00
2. Meal / Workshop luncheon (Monday July 10, 2006) -- on own at Easton Town Center	0.00	\$-
3. Meal / Reception (Monday July 10, 2006)	42.00	\$48.30
4. Meal / Breakfast (Tuesday July 11, 2006) -- Executive Buffet	15.95	\$18.34
5. Meal / Luncheon (Tuesday July 11, 2006) -- Baked Lasagne	16.95	\$19.49
6. Meal / Dinner @ COSI (Tuesday July 11, 2006)	25.00	\$28.75
7. Meal / Breakfast (Wednesday July 12, 2006) -- Business Continental II with Breakfast Burritos	17.15	\$19.72
8. Meal / Lunch (Wednesday July 12, 2006) -- Midwest Buffet	23.95	\$27.54
9. Meal / Breakfast (Thursday July 13, 2006) -- Executive Buffet	15.95	\$18.34
10. Break / Morning (Tuesday July 11, 2006) -- beverage service	3.00	\$3.45
11. Break / Afternoon (Tuesday July 11, 2006) -- Graeter's Ice Cream Break	9.95	\$11.44
12. Break / Morning (Wednesday July 12, 2006) -- beverage service	3.00	\$3.45
13. Break / Afternoon (Wednesday July 12, 2006) -- Buckeye Game Break	10.50	\$12.08
14. Break/ Morning (Thursday July 13, 2006) -- High Energy Break	8.50	\$9.78
15. Break / Afternoon (Thursday July 13, 2006) -- beverage service	3.00	\$3.45

16. Printing - conference proceedings	\$-
17. Promotional items / conference bag & luggage tags	\$10.00
18. Other	\$-
19. Other	\$-
Note: Estimated food costs include 15% gratuity	
<b>TOTAL VARIABLE COST PER PERSON</b>	<b>\$239.13</b>

**Step 3: Calculate FIXED Costs (Costs incurred regardless of how many people attend – estimate high)**

**Complimentary Tickets**

Number of staff and volunteers	5	
Number of keynote Speakers	1	
TOTAL NUMBER OF COMPS	6	
TOTAL COMPLIMENTARY COSTS (Total cost per person * Total number of comps)		\$1,434.78

**Conference Venue (Hilton Easton)**

Room hire (complimentary based on spending at least \$13,000 in food)	\$-	
Audio / Visual Rental	\$3,000.00	
Package Shipping & Receiving Fees (\$20/box * 6 boxes plus \$125/skid * 1 skid)	\$245.00	
	\$-	
Presidential Suite (complimentary)	\$-	
One time set up fee (food)	\$500.00	
Lunch for SCOR/RAC Strategic Planning Session (paid by TRB/NCHRP) - Business Express Buffet for 35 people	\$750.00	
TOTAL VENUE		\$4,495.00

**Evening Meeting @ COSI**

Gallery 2 & 3 Rental for 3 hours (6 pm - 9 pm)	\$1,075.00	
Bus Rental (2)	\$1,300.00	
Bus Parking	\$20.00	
TOTAL EVENING MEETING		\$2,395.00

**Keynote Speakers**

Speaker 1 - fee	\$500.00	
Speaker 1 - lodging (use 1/50 comp room provided by hotel)	\$-	
Speaker 1 - airfare and transport	\$-	
Speaker 1 - meals (in addition to conference meals)	\$-	
Speaker 2 - fee	\$-	
Speaker 2 - lodging	\$-	
Speaker 2 - airfare and transport	\$-	
Speaker 2 - meals (in addition to conference meals)	\$-	
Planning Committee & Speaker gifts	\$100.00	
TOTAL SPEAKERS		\$600.00

**Publicity**

Advertising	\$-	
Logo Design & Development	\$-	
Website	\$-	
TOTAL PUBLICITY		\$-

**Registration**

Online registration system	\$-	
Registration administration	\$-	
Onsite staff	\$-	
<b>TOTAL REGISTRATION</b>		\$-

**Program Materials**

Program brochure - design	\$-	
Program brochure - printing	\$-	
<b>TOTAL PROGRAM</b>		\$-

**Conference Materials provided to participants**

Handouts - design and preparation	\$-	
Evaluation forms	\$-	
Binders, Folders & Tabs	\$125.00	
Region 3 Highlights	\$-	
Other - cd's or memory sticks	\$-	
<b>TOTAL PRINTED MATERIALS</b>		\$125.00

**Rentals:**

COSI Audio-visual Rental (included in food costs)	\$-	
Other	\$-	
Other	\$-	
<b>TOTAL RENTALS</b>		\$-

**Supplies:**

Signs	\$-	
Office Supplies	\$-	
Postage	\$-	
Other	\$-	
<b>TOTAL SUPPLIES</b>		\$-

**Contingency Fund**

Percentage contingency	7.00%	\$633.48
------------------------	-------	----------

**SUB-TOTAL Fixed Costs****\$9,683.26****REVENUE (Nebraska DOT profit from 2003 Region 3 conference)****\$830.50****REVENUE (TRB/NCHRP financing for SCOR/RAC Strategic Planning Luncheon)****\$750.00****BREAKEVEN NUMBER****\$8,102.76**

## Sample Registration Form



The Ohio Department of Transportation  
Office of Research & Development  
1980 West Broad Street  
Columbus, OH 43223  
614-644-8135

**After June 9 the following fees apply:** Participant Registration = \$350  
Guest Registration = \$175

Participant Name: \_\_\_\_\_

*First* *Last*

Badge Name:

Title: \_\_\_\_\_

Organization/Company:

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip-code: \_\_\_\_\_

Email: \_\_\_\_\_

**Do you require an ADA accommodation?** YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, please explain: \_\_\_\_\_

Contact Vicky Fout at 614-644-8135 or [Vicky.fout@dot.state.oh.us](mailto:Vicky.fout@dot.state.oh.us) to discuss no later than **June 19, 2006**.

### Guest/Spouse/Child Registration

Guest name: \_\_\_\_\_

Spouse name: \_\_\_\_\_

Child 1 name: \_\_\_\_\_

Child 2 name: \_\_\_\_\_

Child 3 name: \_\_\_\_\_

Child 4 name:

**Participants:** The meeting registration fee for participants is \$300 and includes all conference materials, registration bag, tours, breaks and the following meals: Reception on Monday evening, Breakfast and Lunch on Tuesday – Thursday, and Dinner at COSI on Tuesday.

**ODOT Participants:** Please contact the Office of Research & Development for separate registration instructions.

**Spouse/Guest/Child:** The meeting registration fee for spouses, guests and children is \$150 each and includes the Reception on Monday evening, Breakfast on Tuesday – Thursday, and Dinner at COSI on Tuesday. *(Note: Does not include business luncheons.)*

**Hotel Registration:** For hotel reservations, please call the Hilton Columbus at Easton Town Center at 1-800-HILTONS or 614-414-5000 and reference the code “DOT.” You can also register online at [www.hiltoncolumbus.com](http://www.hiltoncolumbus.com). Rooms can be reserved for July 9-13, 2006 at the conference rate of \$149 per night for singles and doubles. Please note that the block of rooms and special room rates are valid until **June 18, 2006**. Payment for rooms will be made directly to the Hilton Columbus.





Return this Registration with Payment by June 9, 2006 to

The Ohio Department of Transportation  
Office of Research & Development  
1980 West Broad Street  
Columbus, OH 43223  
614-644-8135

**After June 9 the following fees apply: Participant Registration = \$350  
Guest Registration = \$175**

### Sessions & Activities

	Participant Registration Fee (\$300 before 6/9/06; \$350 after)	Guest Registration Fee (\$150 before 6/9/06; \$175 after)	Guest Registration for COSI only (No other meals included) (\$50 per guest)	Check all events you and/or your guests plan to attend.					
				RAC 101 Workshop July 10 (9 am – 12 noon)	Collaboration Workshop July 10 (2 – 5 pm)	SCOR/RAC Officers Meeting <i>By invitation</i> July 10 (12 noon – 5 pm)	Welcome Reception July 10	COSI Dinner Mtg. & Tour July 11	Transportation to COSI requested (Indicate Yes or No)
Participant									
Guest									
Spouse									
Child 1									
Child 2									
Child 3									
Child 4									
Sub-total Fees									
Total Included									

**Transportation to COSI:** Transportation to COSI will be **provided for the first 100 paid registrants who request it.**  
Please indicate above if you and your guests will require transportation to this event.

**Do you have any special dietary requirements?** YES \_\_\_\_\_ NO \_\_\_\_\_

If Yes, please explain: \_\_\_\_\_

### Payment

#### CHECK

Checks should be made out to “**Treasurer State of Ohio**” with **AASHTO RAC 2006** added on the Memo line.

#### CREDIT CARD

Please check one: VISA \_\_\_\_\_ Master Card \_\_\_\_\_ Amount charged: \_\_\_\_\_

Card #: \_\_\_\_\_ Expiration Date: \_\_\_\_/\_\_\_\_ Card Verification #: \_\_\_\_\_  
4 digits

Billing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Name on Card: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Authorized Signature of Card Holder: \_\_\_\_\_ Contact e-mail: \_\_\_\_\_

## Appendix K

## Sample Evaluation Forms

**AASHTO RAC Annual Meeting  
Overall Evaluation July 10-13, 2006**

**Please tell us what you think...**

Registration Process

- |  |                      |            |
|--|----------------------|------------|
| 1. How was the advance registration process? | Confusing/Cumbersome | Clear/Easy |
| 2. How was the on-site registration process? | Inefficient          | Efficient  |
| 3. How was the payment process?              | Inefficient          | Efficient  |
| 4. How was the hotel reservation process?    | Inefficient          | Efficient  |

Exhibits

- |  |             |                             |               |            |
|--|-------------|-----------------------------|---------------|------------|
| 1. How many of the exhibits did you visit?         | 0           | 1-5                         | 6-10          | 11 or more |
| 2. How informative were the exhibits?              | Nothing new | Some useful info            | Learned a lot |            |
| 3. Was there sufficient time to view the exhibits? | Not enough  | Just right                  | Too much      |            |
| 4. Were the exhibits well-staffed?                 | No          | Yes                         |               |            |
| 5. Were the attendants knowledgeable?              | No          | Yes                         |               |            |
| 6. Should exhibits have attendants?                | No          | Some should; some shouldn't | Yes           |            |
| 7. Should exhibits be offered next year?           | No          | Yes                         |               |            |

Website

- |  |            |          |              |
|--|------------|----------|--------------|
| 1. Did you visit the meeting website?          | No         | Yes      |              |
| 2. Did you find the information there helpful? | Not at all | Adequate | Very helpful |
| 3. Which pages did you find most helpful?      |            |          |              |

<input type="checkbox"/>	Welcome	<input type="checkbox"/>	Exhibits
<input type="checkbox"/>	News	<input type="checkbox"/>	Advance Materials
<input type="checkbox"/>	Meeting Agenda	<input type="checkbox"/>	Presentations
<input type="checkbox"/>	Meeting Registration	<input type="checkbox"/>	Photos
<input type="checkbox"/>	Hotel Registration	<input type="checkbox"/>	Links & Planning Tools
<input type="checkbox"/>	Directions & Maps	<input type="checkbox"/>	Contact Us
<input type="checkbox"/>	Local Attractions	<input type="checkbox"/>	

Food at the Hilton

- |   |                  |                      |                  |
|---|------------------|----------------------|------------------|
| 1. Quality of food                                | Hard to swallow  | Tasty and satisfying | Really yummy!    |
| 2. Quantity of food                               | I'm starving     | Just right           | I'm stuffed      |
| 3. Selection of food                              | Very few options | Nice variety         | Too many choices |
| 4. Were your dietary needs appropriately met?     | Yes              | No                   |                  |
| 5. Which categories should be better represented? |                  |                      |                  |

<input type="checkbox"/>	Vegetarian	<input type="checkbox"/>	Low Sodium
<input type="checkbox"/>	Low Fat	<input type="checkbox"/>	Pork Free
<input type="checkbox"/>	Low Cholesterol	<input type="checkbox"/>	Kosher
<input type="checkbox"/>	Low Carbohydrate	<input type="checkbox"/>	Junk food
<input type="checkbox"/>	Low Calorie	<input type="checkbox"/>	Other _____

- |  |         |            |          |
|--|---------|------------|----------|
| 6. Was there an appropriate number of meals on your own?                 | Too few | Just right | Too many |
| 7. Were you sufficiently able to identify selections and their contents? | Yes     | No         |          |
| 8. Was there an appropriate number of breaks?                            | Too few | Just right | Too many |

**Please continue >>>>>>>>>>**

Facilities

1. Hotel rooms	Poor	Good	Excellent
2. Meeting rooms	Poor	Good	Excellent
3. Heating/Air conditioning	Poor	Good	Excellent
4. Audio/Visual equipment	Poor	Good	Excellent
5. Seating	Poor	Good	Excellent
6. Parking	Poor	Good	Excellent
7. Nearby attractions	Poor	Good	Excellent

Schedule

1. Daily starting times	Too early	Just right	Too late
2. Daily ending times	Too early	Just right	Too late
3. Sufficient time for meals	Not enough	Just right	Too much
4. Breaks & down time	Not enough	Just right	Too much
5. Time of year	Hold earlier	Just right	Hold later
6. Length of meeting	Too short	Just right	Too long
7. Placement of sessions	Illogical	Could use a few adjustments	Well-ordered

Session topics

Please list session topics and suggested speakers you would like to see at next year's meeting.

Other

1. Was the meeting staff helpful?	Incompetent	Fair	Very helpful
2. Were sessions clearly labeled?	Poorly	OK	Clearly labeled
3. Meeting souvenirs	Cheap junk	Fair	Will treasure them always
4. Internet kiosk	_____	Waste of money	
	_____	Used it; didn't like it	
	_____	Used it; liked it	
	_____	Didn't use it, but good idea	

And Most Important of all.....

Did you like the Graeter's Ice Cream?	Yes	No
Should the servings have been larger?	Yes	No, I took several

Are there any other comments or suggestions you would like to share?

Name (optional): \_\_\_\_\_

e-mail (optional): \_\_\_\_\_

## **Appendix L**

### **References**

<http://www.ojp.usdoj.gov/ovc/publications/infores/res/configuid/>

This document was prepared for the Office for Victims of Crime, U.S. Department of Justice, by David E. Migliore, Columbus, Ohio, under purchase order number OC-95-263. The opinions, findings, and conclusions or recommendations expressed in this document are those of the author and do not necessarily represent the official position or policies of the U.S. Department of Justice.

<http://www.designingevents.com/checklist/checklist-a-printer.htm>

Meeting & Meeting Planning Checklist

[http://www.naco.org/NACETemplate.cfm?Section=NACE\\_Events&template=/ContentManagement/ContentDisplay.cfm&ContentID=8774](http://www.naco.org/NACETemplate.cfm?Section=NACE_Events&template=/ContentManagement/ContentDisplay.cfm&ContentID=8774)

National Association of County Engineers Conference Guidelines for State Affiliate Hosts (revised 2001)

