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National Association of Environmental Professionals
Annual Conference and Training Symposium
Planning Handbook

Prepared by the NAEP Permanent Conference Committee

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Please address all suggestions for additions and/or updates to the
NAEP Permanent Conference Committee

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Introduction

The National Association of Environmental Professionals (NAEP) holds an Annual Conference and Training Symposium to further its mission to be the interdisciplinary organization dedicated to developing the highest standards of ethics and proficiency in the environmental professions. This handbook is designed to assist the Annual Conference Committees (ACC) understand the roles and responsibilities of the various individuals involved in the conference planning and the conference planning process, including schedule considerations and necessary actions to achieve a successful conference.

Conference Planning Process and Key Steps

The process of planning the conference includes the following key steps:

- Form an ACC with support of the Permanent Conference Committee (PCC).
- Select a venue with site sourcing assistance from the NAEP Office¹ to be approved by the NAEP Board of Directors (Board).
- Develop a conference budget with assistance from the NAEP Office for Board approval.
- Develop conference planning timeline with assistance from the NAEP Office.
- Issue a call for papers and build a technical program in collaboration with the PCC and Board.
- Solicit sponsorships for the conference in collaboration with the Board.
- Market the conference locally, regionally, and nationally with assistance from the NAEP Office.

[Please find a sample timeline here.](#)

Conference Planning Roles and Responsibilities

The ACC is primarily responsible for the conference planning, along with the support of the NAEP Office. The ACC is comprised of a group of individuals who hold both individual and collective responsibilities for the conference planning effort.

The ACC includes the following key individuals and roles:

- Conference Chair
- Conference Vice Chair
- Attendee Experience Chair
- Marketing Chair
- Sponsorship Chair
- Technical Chair

¹ The NAEP Office supports management of the Annual Conference, see the Roles and Responsibilities section for details.

- NAEP Office
- PCC/Board Liaison
- Social Media Volunteer

Conference Chair

The Conference Chair is selected by the Conference Host and is typically a leader within the affiliated party. The Conference Chair is responsible for oversight of the ACC and ensuring that all aspects of the conference are addressed in coordination with the NAEP Office.

The Conference Chair is typically responsible for the following duties:

- Assist the NAEP Office in finding and selecting an appropriate venue, lodging and dates for the conference.
- Coordinate with the NAEP Office in developing the conference budget and assist with managing the conference budget versus actuals.
- Recruit and oversee volunteers for the ACC.
- Schedule and lead ACC meetings starting approximately 18 months and no later than 12 months prior to the conference to begin planning the conference. The Chair is responsible for creating the ACC agendas and taking and distributing meeting notes to the group.
- Identify and facilitate logistics associated with keynote speakers.
 - Facilitation includes identifying speakers, inviting and obtaining speaker bios, speech titles and descriptions and pictures for the conference program, coordinating with the NAEP Office regarding scheduling, determining audio/visual needs, and introducing keynote speakers at the conference.
 - Keynote speakers are typically invited to speak at one or more plenary sessions at the conference. Keynote speakers should have name recognition and a compelling talk of interest to NAEP membership and conference attendees. A nationally recognized keynote speaker helps generate interest in the conference thus encouraging attendee registration and overall conference success. In contrast, a locally recognized speaker may bring focus to local issues of interest to attendees from the region and across the country.
 - Consider all resources for contacts with nationally recognized speakers: the NAEP Board, Affiliated Chapter Boards, NAEP members who may have a relationship (e.g. employee) with a nationally recognized speaker.
- Lead ACC through final Exit Report to be submitted to the NAEP Office.

Vice Chair

The Vice Chair is responsible for supporting and sharing duties with the Conference Chair. Ideally, the Vice Chair role will be filled by the coming year's Conference Chair, so that the Vice Chair will experience first-hand how the NAEP conferences are planned and executed before serving as Conference Chair.

Attendee Experience Chair

The Attendee Experience Chair is responsible for logistics and preparation associated with the local aspects of the conference. It is helpful if the Attendee Experience Chair is local to the area or has connections to the local area.

The Attendee Experience Chair is typically responsible for the following duties:

- Provide local information to the NAEP Office for use in marketing the conference to highlight local attractions and activities that will garner interest in attending the conference.
- Identify and coordinate conference activities with assistance from the NAEP Office, such as the President's dinner or "dine-around" event.
- Coordinate transportation for offsite events such as field trips, training sessions and/or the President's dinner.
- Conduct outreach to local universities or other institutions about the conference, including the Emerging Professionals Workshop and the scholarships and student award that NAEP awards each year.
- Conduct outreach to other local professional associations/chapters that may have interest in participating in the conference.
- Coordinate volunteers to assist the NAEP Office as needed. Volunteer assistance may be needed at the conference registration desk, directing meeting attendees, and Room Hosts.

Marketing Chair

The Marketing Chair will help develop and communicate the strategic vision of the conference to members and the general community. S/he will keep members informed and engaged, raise greater awareness about the benefits of the conference, and ensure that messaging is both consistent and widely distributed.

- In coordination with the NAEP Office, create internal and external conference communication plans (originally supplied by the NAEP Office for Chair approval).
- With NAEP Office, review all marketing materials related to the conference.
- Create written content for the website and social media outlets for purposes of conference marketing.

- Develop a social media timeline and collaborate with other Committee Chairs to collect content on all aspects of the conference; liaise with NAEP Office (e-blasts and website) and the social media volunteer (social media platforms) to execute.
- Create content for NAEP's Environmental Practice Bulletin for purposes of conference marketing and post-conference reporting.
- Keep Conference Chair and staff updated on progress and issues.
- Participate in regular communications (ex. conference calls) with Committee Chairs.
- Participate in post-conference de-brief and provide suggestions in Exit Report regarding enhancements to conference marketing and communications.

Sponsorship Chair

The Sponsorship chair is responsible for identifying and coordinating solicitation of local and national sponsors. This includes identifying in-kind sponsorships, past sponsors, identifying new organizations or vendors who may be interested in sponsoring or exhibiting at the conference, as well as organizations that typically sponsor local Chapter activities. The NAEP Board is committed to assisting with sponsor recruitment.

- Coordinate with the Conference Chair and NAEP Office to verify sponsorship levels that will be included in the conference budget.
- Create sponsorship prospectus for NAEP Office approval, outlining sponsorship levels, pricing, and deliverables.
- Coordinate with the NAEP Office to prepare and distribute a solicitation for sponsors and exhibitors. The NAEP Office will provide a list of past conference sponsors and supporters.
 - Review the list of past sponsors and brainstorm ideas for potential new sponsors to add to the list.
 - Collaborate with the Marketing Chair and social media volunteer to create content for NAEP Office to send via email blast to past sponsors, membership, Chapter membership, and potential future sponsors.
 - Collaborate with the Attendee Experience Chair to determine if local venues might offer discounts or in-kind services for sponsorship recognition.

The sponsorship chair IS NOT solely responsible for soliciting sponsors and exhibitors. Rather, the role of the chair is to assign and coordinate others to solicit and to follow up on the success of the solicitations.

Technical Chair

The Technical Chair is chosen by the Conference Chair in coordination with the PCC. The Technical Chair does not necessarily have to be located in or affiliated with the Conference Host. The Technical Chair should be an NAEP member with experience planning previous conferences. The Technical Chair leads the Technical Committee and collaborates with the Conference Chair, NAEP Office, and the PCC to

develop the conference program. The Technical Chair has overarching responsibility for the technical content of the conference.

- Recruit a group of volunteers to serve as the Technical Committee.
- Draft the language for the call for papers.
 - The goal of the call for papers is to: (1) encourage people to present papers or posters at the conference; (2) indicate the topics and subject matter of interest; (3) communicate what applicants need to do to submit an abstract; and (4) communicate the deadline for abstract submittals.
- Schedule and lead regular Technical Committee conference calls, create agendas for the calls and take and distribute meeting notes to the committee.
- Manage the collection, organization, review, and selection of abstracts.
- Develop the message to send to applicants whose abstracts have been accepted for oral or poster presentation and to applicants whose abstracts have not been accepted. The NAEP Office will be responsible for notifying all parties.
- Oversee the development of technical tracks to be presented at the conference, as well as the conference schedule.
 - There are standard technical tracks that are typically offered on an annual basis due to their relevance to a significant number of NAEP members and conference participants. These tracks may include:
 - NEPA, including the annual case law update
 - Energy, climate and air quality
 - Public involvement
 - Environmental ethics
 - Transportation
 - Water resources
 - Cultural resources
 - Endangered species
 - Biological resources
 - Remediation
 - Planning, permitting, and regulatory compliance

Additional tracks may be offered based upon current developments pertinent to the environmental profession, new technologies and other areas of interest and value to NAEP members and conference participants.

- There are standard conference events that must be offered within the program schedule, including:
 - NAEP Annual Membership Meeting
 - President's Function (can be in the form of a dinner or otherwise)
- Optional events offered in the program may include, but are not limited to:

- Dine Arounds
 - Technical workshops as outlined below
 - Field trips
- With support of the NAEP Office, manage the paper and presentation submission processes and make decisions that arise regarding changing presenters or sessions.
- Ensure all approved conference proceedings are distributed to the NAEP Office.
 - The conference proceedings consist of the papers submitted by presenters, saved as pdf files with names associated with the author and session. The proceedings are loaded on the conference electronic app and associated with the presenters' sessions shortly before the conference commences.
 - Note that, with rare exceptions, presentations should not be included in the conference proceedings. Including presentations would diminish the value of the papers that presenters have prepared in advance, and also creates logistical challenges regarding revision to the proceedings after the conference.
 - Following the conference, the NAEP Office will post the proceedings to the NAEP website and will be made available to conference attendees. Past conference proceedings are made available to all NAEP members as a benefit approximately one year after the conference is held.
- Develop and facilitate potential workshops, training courses, and/or field trips designed to highlight the local area and Chapter in collaboration with Attendee Experience Chair and Conference Chair. Facilitation includes identifying and following up with instructors to obtain the requested information such as instructor bios and course descriptions, and coordinating with the NAEP Office to identify meeting rooms, audio/visual requirements, and/or transportation, etc.
 - The following technical workshops are regularly offered at the conference, although each is not held every year:
 - Advanced NEPA Workshop
 - Fundamentals of NEPA Workshop
 - Career Development Workshop
 - How to Become a CEP Workshop
 - It should be noted this list is not exclusive and other technical workshops relevant to NAEP members and conference attendees can and should be consider.
- Communicate with the Sponsorship Chair about prospective sponsors based upon those who submitted applications.
- Coordinate with the NAEP awards committee to schedule the presentation of the annual awards and logistics for highlighting award recipients' achievements. How the award recipients are recognized should be addressed early in the planning process as this affects scheduling presentations and space in the exhibitors' hall. It is suggested that awards be presented at a plenary session to as many attendees as possible, such as luncheons or breakfast events, to maximize recognition of recipients and promote the organization's awards program.
- Assist the NAEP Office as necessary during the conference.

Once the ACC is established, each Chair mentioned above will form Sub-Committees of volunteers to assist with their respective duties. These duties are described below.

Technical Sub-Committee

The Technical Chair is responsible for identifying volunteers for the Technical Sub-Committee. A Track Lead is needed for each technical track included in the conference program. The Track Lead is responsible for planning sessions that are relevant to the subject matter. To ensure a successful track, Track Leads should actively solicit the submission of abstracts relevant to the subjects of their sessions. Once planned, the Track Leads then work to identify a Session Moderator for each session, and work with presenters from each session (or their Session Moderators) to develop relevant and interesting discussions for each session.

The Track Lead is responsible for the following duties:

- Develop subjects for sessions and solicit abstracts from potential presenters and panels on a particular topic relating to the technical track.
 - The ACC and the NAEP Board will assist with soliciting abstracts as needed to support development of the best possible technical program.
- Participate in planning meetings and/or conference calls as requested by the Technical Chair.
- Review all received abstracts for applicability to their track and sessions.
- Prepare a summary description of their track for the conference website.
- Provide session information to the NAEP Office as requested for the conference website and conference mobile app.
- Help the Technical Chair and NAEP Office fill gaps in the program if presenters cancel.
- Communicate with the Sponsorship Chair about prospective sponsors based upon Conference presenters.

NAEP Office

The NAEP Office provides full-service management of the Annual Conference, with a focus on strategic growth and creating a memorable conference experience for attendees, to include the following support:

Venue/Logistics

- Support site selection for future annual conferences including RFPs, venue contract negotiation, meeting space assignments and site visits.
- Negotiate, contract, and serve as sole contact with contracted facilities and all contracted vendors for meeting-related services.
- Provide onsite logistical support e.g., audio visual and special equipment, offsite venues/tours, food and beverage menus and guarantees, room setups, and onsite staffing.
- Monitor and manage room pick-ups, dates in contracts, penalty clauses, etc.

Committee

- Provide logistical support to the Annual Conference and Host Committees; work with the ACC to create a planning timeline, meet deadlines, prepare marketing materials and stay within budget; assist in long-term conference planning.
- Participate in committee meetings and support the Conference Chair in developing and clarifying roles and responsibilities of volunteers and the NAEP Office.
- Participate with the Annual Conference Committee on event evaluation and review of lessons learned; distribute post-event evaluation and report findings to the NAEP Board.

Registration

- Update and maintain online registration form.
- Process registrations and prepare attendee rosters, name badges, and registration materials.
- Provide periodic registration reports to the Annual Conference Committee.
- Provide and manage onsite registration.

Program/Speakers

- Create and manage online call for papers and abstract submissions. Compile abstracts for the Technical Committee for selection.
- Manage all speaker logistics, including abstracts, presentations, registrations, bios, headshots, and session descriptions.
- Work with the Annual Conference Committee to finalize conference schedule and notify selected presenters.
- Create and maintain all speaker contracts; coordinate with Technical Committee to negotiate honorariums/agreements.
- Manage all poster session startup and tear down logistics and coordinate speaker and VIP check-in and logistics.
- Obtain speaker presentations and handouts, post to website.
- Submit American Institute of Certified Planners (AICP) application for Certification Maintenance (CM) credits.

Sponsors/Exhibitors

- Assist Sponsorship Committee with development of sponsorship and exhibitor prospectus.
- Help organize Board and/or Sponsorship Committee to solicit sponsors and exhibitors.
- Provide any needed information for the Sponsorship Committee and/or NAEP Board to actively recruit sponsorships.
- Ensure sponsor recognition and fulfillment on promotional materials.
- Correspond with sponsors/exhibitors for a collection of logos, ads, promotional materials, and send setup instructions.
- Create sponsorship registration form.
- Prepare exhibit hall layout and coordinate setup and teardown.
- Help coordinate passport program.

Marketing

- Manage promotional email marketing and coordinate collection of content from the Marketing Chair and design of all marketing materials, program materials, and signage.
- Negotiate conference mobile app contract; project manage setup; administer app.
- Conference website management (content provided by volunteers).
- Conduct online attendee evaluation surveys and post-event analysis.

Awards

- Coordinate onsite logistics for student scholarships and Annual Awards program.
- Create submission forms: compile submissions for Awards Committee for selection.
- Maintain historical roster of award winners.
- Coordinate scholarship and winner awards, check request forms, collect W-9s, complimentary memberships.
- Coordinate ordering of award plaques; track plaque orders; proof plaques; frame certificates for honorable mentions.
- In coordination with the Awards Committee Chair, send communications with winners and rejected nominees (content supplied by committee).
- Collect PowerPoint presentations from volunteers for onsite awards program.

Finance

- Develop conference budget with input from conference committee.
- Reconcile conference financials; maintain budget to actuals.
- Provide Conference Host with a check based on final revenue split as authorized by the NAEP Board.

In support of the SBI/NAEP partnership, NAEP will determine the educational content and make the speaker selection(s), actively drive sponsorship/exhibitor development and stewardship; provide written content to support marketing efforts according to mutually agreed upon deadlines; and provide decisions and directives per agreed upon timelines and that are within the approved budget.

PCC/Board Liaison

The PCC/Board Liaison is a member of the PCC and/or Board who participates in the ACC's regular meetings and serves as a link between the ACC, the PCC, and the NAEP Board to exchange information and follow up on questions. The PCC/Board Liaison is appointed by the PCC.

NAEP Conference Policies

This section explains the policies applicable to the NAEP conference planning. The NAEP Board and PCC established policies addressing specific aspects of for planning and hosting the annual NAEP conference. The ACC must read the policies and are strongly encouraged to discuss the policies with the PCC at the beginning of the conference planning process. These policies have been carefully developed to ensure the quality and integrity of the conference and of the NAEP. Adherence to the policies is important to the profitability of the conference, and, by extension, enhances profit-sharing with the Conference Host. If necessary, recommendations for waivers from or changes to the policies should be addressed to the PCC early and must receive approval by the NAEP Board prior to implementation. The PCC strongly encourages and welcomes feedback from the ACC regarding the policies and will consider suggested revisions in future updates to the referenced documents.

NAEP Conference Registration Fee Policy

Conference registration fees are intended to cover the costs of attendees (e.g., food, meeting space, etc.). These fees generally do not generate profit, and so discounted or complimentary registrations have a direct impact on the conference budget and profitability. However, in some cases, discounted or complimentary registrations or session-only fee waivers may be deemed appropriate. The policy regarding discounted conference registration fees is described below.

Complimentary Registration

Complimentary registrations may be for the full conference or one day. A full conference complimentary registration includes all events and benefits included with a full conference registration. Lodging, events, training sessions and other optional items that require an additional fee are not included in a complimentary registration. The person receiving the complimentary registration is responsible for any additional fees.

Individuals who receive a complimentary one-day registration are responsible for paying for any additional event or training sessions offered on the day of the complimentary one-day registration.

Complimentary registrations shall be granted only to members of NAEP, except where noted below. In some cases, complimentary registrations are transferrable, as noted below. The following categories of attendees may receive complimentary registration for the conference:

- The NAEP President, NAEP Fellows, Conference, Vice and Technical Chairs are granted one full conference complimentary registration.
 - The spouse and immediate family members (up to 4) of the person to be designated as an NAEP Fellow will not be required to pay for the event at which he/she is designated a Fellow. Additional event tickets may be requested on a space available basis. Arrangements for guest attendance must be made with the NAEP Office before conference registration closes.
- Invited keynote and/or plenary speakers receive one full conference complimentary registration. These speakers are not required to be NAEP members to receive complimentary registration. All other speakers must register for the conference.
- The Zirzow Award winner receives one full conference complimentary registration. The winner is not required to be a member of NAEP to receive complimentary registration.
- Some categories of sponsors receive complimentary registrations with sponsorship, as determined by the approved sponsorship prospectus and budget. Sponsors are not required to be NAEP members to receive complimentary registration. Sponsor registrations are transferrable.
- In some cases, scholarship money may be available for presenters requiring assistance with conference registration fees. These scholarships, either covering partial or full conference registration fees, shall be awarded on a case-by-case basis at the discretion of the Conference Chair, and must be accounted for in the conference budget.

Registration and Event Fee Waivers

In some cases, individuals may participate in the conference but not generate expenses (e.g., food, meeting space, etc.). These individuals may be granted fee waivers with limitations. **The Conference Chair must approve all fee waivers and coordinate with the NAEP Office before registration closes.**

The following individuals may be eligible for registration fee waivers:

- Presenters that are invited by the Technical Chair because of their renown and expertise to the proceedings, may receive one session-only fee waiver.
- Individuals who participate in the Emerging Professionals Workshop may receive fee waivers to attend the workshop and the opening network reception.
- Volunteers not attending the conference sessions or events may receive fee waivers as long as there are no food and beverage costs.
- Award winners may receive two fee waivers for the event at which they will receive their award. This is a fee waiver for the event only and does not include a conference registration fee waiver.

It is important to note that individuals receiving fee waivers may not partake of any events or meals associated with the conference, as these costs would directly impact the conference budget and profit. If the ACC is interested in providing complementary meals or event participation for individuals receiving fee waivers, these costs must be accounted for in the conference budget approved by the NAEP Board. One exception is award recipients (see “Conference Registration and Other Fees Changed to NAEP Award Winners” section for details).

Conference Registration and Other Fees Charged to NAEP Award Winners

The Technical Chair should coordinate with the NAEP Awards Committee regarding the presentation of awards at the conference. The following policy applies to award winners regarding conference registration and event fees.

Award winners are allowed two complimentary event tickets for the event where they will receive their awards; if they are receiving awards at different events, then they also receive two free event tickets for the second event. For instance, if the award will be given at a luncheon, then two people can attend the luncheon at no cost to them. This applies to all food events at the conference.

If the award winners want to attend conference sessions or events other than the event where they receive the award, they must register for the conference at either a one-day conference registration or full conference registration fee, and will receive the equivalent registration pricing to the regular NAEP member rate. Award winners are responsible for all extra costs not included in the base registration (workshops, excursions, etc.). Award winners will be given a tabletop exhibit for three days, if desired. The exhibit space must be requested before conference registration closes.

This policy applies to the NAEP, Arnold, and Kramer award winners; it does not apply to the Zirzow Award winner. The Zirzow fund and NAEP provides a complimentary registration for the Zirzow Award winning student and the luncheon fee for the student's professor.

Complimentary Hotel Rooms

Negotiated rooms will first go to the NAEP Office members to minimize overhead costs to the group. From there, the NAEP President and Conference Chair will receive complimentary hotel rooms. The NAEP President and Conference Chair may transfer the complimentary hotel room at their discretion.

NAEP Conference Profit Sharing Policy

The Conference Host typically is an affiliated NAEP Chapter but could also be a group or entity interested in forming a chapter. NAEP shares the profit from its annual conferences with the Conference Host as follows:

- Conference Host will receive 20% of conference profit if profit up to the NAEP Board-approved conference budget revenue projection.
 - The conference is the primary funding source for the NAEP operating budget. As such, the conference budget revenue projection must align with the NAEP operating budget for the Board to approve.
 - Example: the 2019 conference budget called for \$51,643 net profit to NAEP, which aligned with the conference revenue projection included in the 2020 NAEP operating budget. [A sample conference budget may be found here.](#)
- Incentive Plan: If conference revenue exceeds the Board-approved budget revenue projection, Conference Host will receive 50% of conference profit for the exceeded portion of the revenue.
 - The objective of the incentive plan is to encourage the Conference Host to minimize costs and maximize profit through local marketing of the conference and sponsorship opportunities.
 - Example: if the Board-approved budget revenue projection is \$80,000 and the actual conference revenue is \$90,000, then the Conference Host would receive 20% of the projected revenue (\$16,000) and 50% of the revenue exceeding the board-approved projection (\$5,000).

It is the expectation of NAEP that the Conference Host actively partners with NAEP in the planning and execution of the conference by making good faith effort to recruit committee and sub-committee members to support planning efforts, meet or exceed the agreed upon conference budget and profit, and meet or exceed attendance and sponsorship goals.