
**HOW TO PLAN, ADMINISTER, AND EVALUATE
TRAINING CONFERENCES AND TECHNOLOGY FAIRS**

A practical guide with samples and ready -to-use tools

*DEPARTMENT OF HEALTH AND HUMAN SERVICES
OFFICE OF GRANTS MANAGEMENT*

DECEMBER 1998

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PART I. INTRODUCTION

Why was This Guide Developed?

The Department of Health and Human Services (HHS) periodically plans and conducts training conferences and technology fairs, both for its workforce and for external audiences. The Office of Grants Management/Office of Grants and Acquisition Management/ Assistant Secretary for Management and Budget developed this guide as a reference tool to assist those within HHS who may be tasked with the planning, administration, and evaluation of a training conference and/or technology fair.

A major catalyst for the development of this guide was the advent of the recent Grants Management Training Conference and Information Technology in Grants Management Fair (CONFAIR 1998). As many of the sample tools and materials found in this guide are taken from CONFAIR, the purpose and structure of CONFAIR are described below.

What is the Grants Management Training Conference and Information Technology in Grants Management Fair (CONFAIR)?

CONFAIR is a venue for sharing information on current grants management policies, trends, and issues, and a forum for demonstrating information technology tools and systems in use throughout the HHS' grants management offices. CONFAIR is sponsored by the Office of Grants Management.

CONFAIR was developed in response to a need to unify grants management professionals' understanding of current information technology and its uses in making grants management and policy operations more productive. The CONFAIR approach was found to be a powerful means of presenting to grants personnel the latest in grants management and policy issues, as well as a diverse range of information technology applications in use across HHS.

The first CONFAIR, in March 1998, was divided into two days--the first being a training conference and the second an information technology fair. Day one included presentations by both individual speakers and panels on various grants related topics. Day two included presentations, as well as continuous demonstrations, of various systems and tools pertinent to the grants management community.

How is This Guide Organized?

This guide is divided into four main parts as shown below. In many cases, procedures for both the training conference and technology fair are the same. However, in those cases where there are differences, the procedures for the two are broken out into a training conference section and a technology fair section.

Part I. Introduction

This part describes the purpose of this guide, CONFAIR 1998, and tips on how to use the guide and the samples it contains.

Part II. Planning

This part describes a variety of planning topics and provides sample materials that may be helpful in the planning of training conferences and technology fairs.

Part III. Administration

This part describes a variety of administrative topics and provides sample materials that may be helpful in the administration of training conferences and technology fairs.

Part IV. Post-Event Activities

This part describes a variety of post-event activities and provides sample materials that may be helpful in implementing follow-up activities to training conferences and technology fairs.

INTRODUCTION

Where Can I Find Sample Materials and Tools?

This guide contains a number of sample tools and materials from CONFAIR that may be useful for planning, administering, and evaluating other training conferences and technology fairs. Any of these samples may be tailored to meet current needs.

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PART II. PLANNING

Plan of Action



Plan of Action

The first thing that should be done when planning for a training conference or technology fair is to develop a plan of action. A plan of action lists all activities that should be carried out, who is responsible for each activity, and a timetable for completing each activity. All parties who are responsible for tasks should be involved in this discussion.

A sample plan of action is included in this section. Tasks can be added or changed as needed—tailor it to fit your needs.

Conference Planning Timetable

A generic conference planning timetable is also included in this section as general planning guidance. It provides the most appropriate timing for various generic planning tasks. Planning for a training conference or technology fair should begin approximately a year prior to the date of the event.

PLANNING

Sample Preliminary Plan of Action

Activity	Responsible Party	Estimated Date
Reserve facility		
Review facility contract details		
Develop preliminary list of topics		
Develop solicitation memo		
Identify mailing list for solicitation memo		
Send solicitation memo		
Develop questionnaire for facility coordinator		
Visit/interview facility coordinator		
Act as liaison between HHS and facility		
Clarify budget requirements		
Develop preliminary agenda (presentation schedule)		
Develop projected facilities requirements		
Develop packet for presenters (format, timing, facility info., etc.)		
Send packet to presenters		
Review presentation outlines prepared by presenters		
Finalize presentation outlines		
Review handouts prepared by presenters		
Finalize handouts		
Develop final training conference and technology fair agendas		
Perform dry-run of presentations at facility		
Compile handouts on Web page where possible		
Develop marketing flier		
Distribute marketing flier		
Develop marketing blurb		
Place marketing blurb on the Web		
Place marketing blurb in an HHS grants management publication		
Request bios of presenters to place in program		
Develop list of attendees		
Identify special needs of attendees and presenters		
Develop program for attendees (titles of sessions, times, references)		
Determine registration payment recipient and payment types; set registration deadlines; determine other information to collect		
Develop pre-registration materials		
Pre-register attendees; collect data on sessions they wish to attend		
Generate registration confirmation letters		
Obtain pens/pencils and notepaper		
Identify onsite personnel and duties: registration setup and staffing; troubleshooting; attendance validation, etc.		
Develop evaluation form(s)		
Distribute, collect, and evaluate evaluation forms		
Coordinate with photographer		
Coordinate with catering firm/decide on meals or coffee breaks		
Contact hotel(s) about accommodations for out-of-town presenters and attendees; reserve room blocks as needed; obtain hotel expectations		
Print tent cards and signs		
Develop thank-you letters for presenters		
Send thank-you letters to presenters		

PLANNING

Sample Generic Conference Planning Timetable

Timetable	Task
One year out (minimum: 1/2 year)	<ul style="list-style-type: none"> <input type="checkbox"/> Determine objectives & program topics <input type="checkbox"/> Check on competing conferences/topics <input type="checkbox"/> Establish budget <input type="checkbox"/> Develop marketing plan <input type="checkbox"/> Select meeting dates/site <input type="checkbox"/> Negotiate for hotel rooms and reserve room blocks <input type="checkbox"/> Begin to invite speakers <input type="checkbox"/> Establish preliminary program <input type="checkbox"/> Begin to solicit speakers and supporters
6 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm speakers; Obtain program information <input type="checkbox"/> Place meeting announcements
5 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm commercial support <input type="checkbox"/> Order mail lists <input type="checkbox"/> Establish brochure contents <input type="checkbox"/> Design brochure: Contact printer <input type="checkbox"/> Contact caterer
4.5 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Print brochures <input type="checkbox"/> Determine registration procedures and communications
4 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Mail brochures
3 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Acknowledge registrations as received <input type="checkbox"/> Track registrations (ongoing)
2 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Finalize A/V requirements <input type="checkbox"/> Send press releases on conference and speakers <input type="checkbox"/> Review meeting site and hotel contracts: note and document deadlines for room block changes <input type="checkbox"/> Finalize menus for food functions <input type="checkbox"/> Prepare handouts/secure printer <input type="checkbox"/> Determine recipients of 2nd brochure mailing based upon early registration data
1.5 months' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Identify onsite personnel and assign duties: registration setup and staffing; room checks; function checks, troubleshooting. <input type="checkbox"/> Review registration numbers and issue other personal invitations
1 month prior	<ul style="list-style-type: none"> <input type="checkbox"/> Order signs, badge stock, holders, special ribbons <input type="checkbox"/> Finalize program and syllabus production schedule <input type="checkbox"/> Receive signs and proofread: Receive syllabi <input type="checkbox"/> Print tent cards for speaker/moderators' table(s) <input type="checkbox"/> Print participant badges; Develop meeting session and introductory slides <input type="checkbox"/> Contact all vendors and review services <input type="checkbox"/> Assemble onsite materials <input type="checkbox"/> Finalize registration procedures and schematic for activities associated with setup and participant traffic during registration hours
2 weeks' prior	<ul style="list-style-type: none"> <input type="checkbox"/> Release hotel rooms or re-negotiate room block based on number of registrations <input type="checkbox"/> Send instructions about deliveries from vendors
1 week prior	<ul style="list-style-type: none"> <input type="checkbox"/> Review A/V requirements with facility <input type="checkbox"/> Receive signs and proofread <input type="checkbox"/> Receive program books and materials <input type="checkbox"/> Print badges for participants and tent cards for dais <input type="checkbox"/> Contact all vendors to review services <input type="checkbox"/> Assemble onsite materials

Speaker/Presenter Solicitations



Separate memoranda should be prepared to solicit speakers and topics for the training conference and for presenters and systems for the technology fair.

Training Conference

The training conference solicitation should include the following components:

- ☐ Name and description of event
- ☐ Date of event
- ☐ Location of event
- ☐ Approximate cost of registration
- ☐ Request for feedback on the number of slots each agency would use
- ☐ Point of contact name, telephone, FAX, and email address
- ☐ Preliminary themes and topics for training
- ☐ Request for feedback and information on:
 - Relative importance and relevance of preliminary topics
 - Suggestions for specific coverage
 - Suggestions for alternative topics
 - Recommendations for informed and dynamic speakers

Technology Fair

The technology fair solicitation should include the following components:

- ☐ Name and description of event
- ☐ Date of event
- ☐ Location of event
- ☐ Approximate cost of registration
- ☐ Request for feedback on the number of slots each agency would use
- ☐ Point of contact name, telephone, FAX, and email address
- ☐ Preliminary list of systems to be presented
- ☐ Request for feedback and information on:
 - Preliminary systems
 - Additional systems
 - Presenter for each system
 - Preliminary information on the facilities and equipment needed

A sample of a solicitation letter for a technology fair is included on the next page.

Sample Technology Fair Solicitation Letter

MEMORANDUM

TO: Members of Executive Committee on Grants Administration Policy
FROM: Director, Office of Grants Management, ASMB
SUBJECT: Grants Management Conference and Information Technology Fair
March 25 and 26, 1998

Earlier this month, you received a memorandum dated October 29, 1997, referencing a two-day training event at the Natcher Conference Center. That memorandum requested that you participate in planning for the Grants Management Conference (day 1). This memorandum is to request your cooperation in planning for the Information Technology Fair (day 2). Please notice that the dates have changed somewhat. The conference will take place on March 25 and the fair on March 26, 1998.

Attachment A to this letter provides a list of potential systems to be presented at the fair. Please review this list and provide us feedback on additional systems you would like to see presented or other changes you suggest to this list. Also attached is a table of best practices compiled during a March 1996 technology survey conducted by HHS (see attachment B). These best practices may prompt you with ideas of systems you would like to see presented at the fair.

If your OPDIV has a system on this list or if you suggest a system from your OPDIV be added to this list, please let us know who will be presenting the system at the fair. We need the following information for each presenter: presenter's name and telephone; name of system; type of presentation envisioned (e.g., hands-on demonstration, slide show, etc.), and preliminary information on the facilities and equipment needed for the presentation.

After presenters have been identified, we will contact them to discuss their presentation in more detail and continue the planning process. We are in the process of preparing a packet of information for each presenter that will include items such as: instructions for the format of the presentation, example handout information, and Natcher Conference Center capabilities.

Cara Whitehead of this Office will coordinate your responses to this request. Please respond to her before Friday, November 28, at 202-690-5731 (phone), 202-690-6902 (fax), or cwhitehe@os.dhhs.gov (e-mail). She will keep you informed as the planning process continues.

Charles Gale

cc: Electronic Grants Subgroup
Attachments

Sample Technology Fair Solicitation Letter (continued)

Preliminary Topics for Information Technology Fair

The following systems/topics were identified by a work group composed of both grants management and computer professionals across the Department.

- ☐ GrantsNet
- ☐ TAGGS
- ☐ FIND
- ☐ IMPAC II
- ☐ GATES
- ☐ PMS
- ☐ FIRS
- ☐ FARS
- ☐ RADS
- ☐ ACF Regional Systems
- ☐ NIH Closeout System
- ☐ NIH Interactive Award System
- ☐ Grants Management systems used by other Departments
- ☐ Using Internet to perform grants management work functions
- ☐ Working and communicating with information resource management staff

Presenter Package for Technology Fair



A package of information should be sent to each person who will be presenting or demonstrating a system at the technology fair. The purpose of this package is two-fold:

- ☐ To provide each presenter at the technology fair with preliminary information on the fair agenda, presentation format, and the capabilities of the site where the fair will be located.
- ☐ To provide the technology fair planners with preliminary information on presentation content and timing and the equipment that will be required.

The presenter package should contain, at a minimum, the following components:

- ☐ Preliminary Agenda
- ☐ Presentation Guidelines
- ☐ Facilities and Equipment Survey
- ☐ Facility Overview/Capabilities

Sample presentation guidelines and a sample facilities and equipment survey can be found on the pages that follow.

Closer to the date of the event, once details are known, a separate packet or email should be sent to the presenters to indicate such information as:

- ☐ Loading instructions
- ☐ Where to go to when they arrive at CONFAIR
- ☐ Maps with directions and parking areas
- ☐ Final agenda showing times and rooms

This same finalized information should be sent to speakers of the training conference.

Sample Presentation Guidelines

Presentation Outlines

Please prepare an outline of your presentation, preferably in Microsoft Word 6.0. Include the following items in your outline.

- ☐ *Outcomes.* Provide the outcome or objective you wish the participants to accomplish by the end of your session.

- ☐ *Key topics and subtopics*
 - ⇒ Explain the purpose of the system and how it relates to grants management; provide data on system costs and performance.
 - ⇒ Review when and how the system was developed and implemented, including lessons learned; discuss plans to upgrade or expand the system.
 - ⇒ Explain the specific functional capabilities of the system, particularly those of interest to grants management; demonstrate these functional capabilities to the extent possible.
 - ⇒ Explain how the system relates to or is integrated with other systems.

- ☐ *Methods and media.* Indicate how the presentation will be delivered, such as lecture, lecture and discussion, demonstration, group exercises, etc. Indicate the tools that will be used to present, such as computers, paper handouts, overheads, slides, videotapes, etc.

- ☐ *Time Estimates.* Provide an estimate of the amount of time required for the entire presentation, including time for questions and answers.

Handouts

- ☐ Each presentation should have handouts. Wherever possible, handouts will be consolidated and compiled on the Web prior to the fair. Paper handouts can be provided to the audience as well. Include names, telephone numbers, and e-mail addresses of experts to contact for questions regarding the system presented.

Overheads and Slides

- ☐ Overhead presentations should be in Microsoft Powerpoint (minimum of version 4.0).

- ☐ Slides should follow the specifications listed in the Natcher Conference Center (NCC) Overview/Capabilities information that follows.

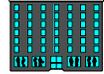
PLANNING

Sample Facilities and Equipment Survey

Please indicate the type of facilities/equipment you anticipate needing for your presentation. This information will help us to determine room assignments and to ensure the equipment is available to you.

Facilities and Equipment	Check All That Apply
Computer (<i>NCC will not provide this</i>)	
Laptop (<i>NCC will not provide this</i>)	
Overhead projection	
Single slide projection	
Dual slide projection	
VCR projection	
Computer projection	
Modem	
Network (LAN)	
ISDN line	
Screen	
White board	
Flip chart paper and easel	
Dry erase markers	
Podium or table with microphone	
Tables (chairs are provided)	
Videotaping	
Audiotaping	
Special needs (handicapped access, etc.)	
Other (please specify)	

Facility



The facility for either a training conference or technology fair must be reserved well in advance--a year in advance is not too soon. Whatever facility is chosen, a close relationship with the facility coordinator before and during the event is crucial to its success. Make plans to visit the facility, get a tour, and sit down with the facility coordinator to ask questions.

The following are some possible questions to ask the facility coordinator:

- Which rooms are assigned to us? Do you have a schematic of the rooms showing such things as electrical sockets and modem jacks? What are the AV capabilities of each room?
- What are the lunch and break options? What sites do you recommend for lunch and coffee breaks? Where do guests eat if meals are catered?
- What is the limit on the number of people who can attend?
- What on-site services do you provide automatically? For additional cost? What is cost of technical support? Are there other support personnel available?
- Can you provide registration help? At what cost? Are they familiar with the facility? How many helpers are needed assuming X number of attendees? Can we ask them to help with other things too?
- Do you have a Facility Overview Guide?
- Do you have any additional capabilities information or price lists available besides what is in the Facility Overview Guide?
- Are you the point of contact we should deal with for everything? Are there other names and phone numbers we should know?
- What services are offered at the Concierge Desk? What are the hours of operation?
- Where is the loading/delivery area? Is there a map? What is the procedure before and during the meeting?
- Where do attendees park? How much does it cost?

Facility (continued)

- Is a dry-run possible? If so, when and where?
- What special needs are provided for? Is there equipment available for the hearing impaired? For wheelchairs?
- Do you provide any supplies?
- How is the room set up (tablecloths, water pitchers, etc.)?
- Do you have free-standing holders for signs? How many are available? What size? (The dimensions of the sign holders are needed for production of the signs.)
- Do you have free-standing wall dividers (possible uses: as backdrop for registration area, to hang signs on, to create dead space out from the wall to store items).
- What time of day does registration normally begin? Where is the registration location? What are the normal start and end times for conferences? What are the usual times for lunch and breaks?
- What are the policies and procedures for making telephone calls or FAXes?
- Will there be other events going on in the facility on the same days?

Marketing



There are several methods of marketing a training conference or technology fair. These may include but are not limited to:

- ☐ Sending e-mails to offices
- ☐ Distributing fliers
- ☐ Placing a marketing announcement on a Web page
- ☐ Including information in an HHS grants management publication

Marketing should be done at the earliest opportunity. As soon as the agenda items are firm, at least one form of announcement should commence. Whichever method of marketing is employed, registration information should be included. If the response is not as high as expected with one form, another form of marketing can be employed.

A sample marketing flier is included on the next page.

Sample Flier

CONFAIR 98

Grants Management Training Conference and Information Technology In Grants Management Fair

“Maintaining Leadership and Integrity in an Electronic Environment”

WHEN: March 25 - 26, 1998

WHERE: NIH Natcher Conference Center
45 Center Drive
Bethesda, Maryland

Wednesday, March 25

- Office of Inspector General - Working Together with DHHS Grants Management
- Electronic Linkages and the Extended Grant Community
- Achievements and Recognition in Grants Management
- Issues and Practice in Grants Management at the Institutional and Executive Level
- The Research Grant Perspective
- State and Federal Perspectives on Grants Management and Program Accountability

Thursday, March 26

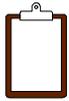
- Commons
- GATES
- GrantsNet
- IMPAC II
- Infonet
- NIGMS
- PMS
- RADS
- SGIMS
- TAGGS

COST: \$50.00 for both days

REGISTRATION: To register for CONFAIR 98, contact Cara Whitehead by March 6.
phone: 202-690-5731 email: cwhitehe@os.dhhs.gov

Department of Health and Human Services ♦ **Office of Grants Management**

Registration



When the training conference or technology fair is announced through email or other modes, a registration form should be included. The form should include such information as:

- Registration deadline
- Total cost
- Accounting and appropriation data
- Administrative data
- Information on where to send completed registration

A sample registration form is included on the next page.

Sample Registration Form

**CONFAIR 98
Grants Management Training Conference
and
Information Technology in Grants Management Fair

NIH Natcher Conference Center
Wednesday and Thursday
March 25 and 26, 1998**

ECGAP representatives of OPDIVs and STAFFDIVs sponsoring staff attendance at Confair 98 should have the registration information below completed, attach a list of personnel attending, and return the completed form and list to the address below not later than Friday, 13 February, 1998.

Agency: _____
Attendance sponsored - number of participants: _____
Total cost - number of participants @ \$50 each: \$ _____

FY 1998 Accounting and Appropriations Data:

Appropriation Number _____
CAN Number _____

Authorizing Official:

Name (typed) _____
Signature _____
Phone number _____

Administrative Data:

Training Coordinator:
Name _____
Agency Office _____
Mailing address _____
Phone number _____
FAX number _____

Mail or FAX completed form and attendees list (substitutes welcome) to:

John Grady FAX: 202-690-6902
OGM/ASMB, Room 517D
HHH Building
200 Independence Ave. SW
Washington DC 20201

Not later than Friday, 13 February, 1998

Preparation of Programs and Handouts



Training Conference

Programs

The program is the collection of materials that is given to each attendee as they check in at the registration desk. The program for a training conference should contain, at a minimum, the items listed below. These may be placed in an attractive folder with the event name on the cover.

-  Conference Agenda
-  Speaker Biographies
-  Facility Map
-  Conference Evaluation Form

Samples of most of these items can be found on the pages that follow.

Handouts

Speakers should be instructed to provide copies of their Powerpoint presentations for each attendee as well. This will allow attendees to focus on the presentation instead of taking notes.

Technology Fair

Programs

The program for a technology fair should include, at a minimum, the items listed below.

-  Fair Agenda
-  System Descriptions
-  Facility Map
-  Fair Evaluation Form

Samples of most of these items can be found on the pages that follow.

Handouts

Presenters should be instructed to provide copies of relevant system materials and any presentations that have been made.

Sample Conference Agenda

CONFAIR 1998

**Grants Management Training Conference
*Maintaining Leadership and Integrity in an Electronic Environment***

AGENDA: March 25, 1998 (Wednesday)

MORNING:

- 8:00 - 9:00** Registration and Continental Breakfast
- 9:00 - 9:30** *Welcome and Opening Remarks*
Charles W. Gale, Director, Office of Grants Management, ASMB
Terrence J. Tychan, Deputy Assistant Secretary, Grants and Acquisition Management, ASMB (event sponsor)
Geoffrey E. Grant, Director, NIH Office of Policy for Extramural Research Administration (host institution representative)
Charles Bish, Office of Grants Management, ASMB (conference moderator)
- 9:30 - 10:30** *Panel: Office of the Inspector General - Working Together with HHS Grants Management*
Chair: Joseph J. Green, Assistant Inspector General for Public Health Audits, OIG
- 10:30 - 10:45** Break
- 10:45 - 11:30** *Panel: Electronic Linkages and the Extended Grants Community*
Gerald B. Stuck, Electronic Research Administration Coordinator, Federal Demonstration Partnership
Diana L. Jaeger, Grants Policy Officer, NIH
Andy Boots, Consultant, National Partnership on Reinventing Government
- 11:30 - 12:00** *Achievements and Recognition in Grants Management*
John J. Callahan, Assistant Secretary for Management and Budget

AFTERNOON:

- 12:00 - 1:00** Lunch
- 1:00 - 2:00** *Panel: Compliance Confidence and Cooperation: Issues and Practice in Grants Management at the Institutional and Executive Level*
Chair: Geoffrey E. Grant, Director, NIH Office of Policy for Extramural Research Administration
- 2:00 - 2:45** *The Research Grants Perspective*
Julie T. Norris, Director, Office of Sponsored Programs, Massachusetts Institute of Technology
- 2:45 - 3:00** Break
- 3:00 - 3:45** *State and Federal Perspectives on Grants Management and Program Accountability*
Norwood J. Jackson, Jr., Deputy Controller, Office of Financial Management, OMB
- 3:45 - 4:00** *Retrospective and Closing Remarks: "Come to the Fair"*
Charles W. Gale, Director, Office of Grants Management, ASMB

PLANNING**Sample Fair Agenda****CONFAIR 1998****Information Technology in Grants Management Fair****AGENDA: March 26, 1998 (Thursday)**

8:00 - 9:00	Registration and Continental Breakfast
9:00 - 4:00	Presentations and Continuous Demonstrations (see below)

PRESENTATIONS:

	Balcony A	Balcony B	Balcony C
9:00 - 10:00	GATES Grants Administration Tracking and Evaluation System (ACF)	Commons/IMPAC II (NIH)	PMS Payment Management System (PSC)
10:00 - 10:30	Demonstrations/Break		
10:30 - 11:30	TAGGS Tracking Accountability in Government Grants System (OS)	NIH Grants Management Infonet (NIH)	RADS Rate Agreement Distribution System (PSC)
11:30 - 1:00	Demonstrations/Lunch		
1:00 - 2:00	TAGGS Tracking Accountability in Government Grants System (OS)	Commons/IMPAC II (NIH)	PMS Payment Management System (PSC)
2:00 - 2:30	Demonstrations/Break		
2:30 - 3:30	GATES Grants Administration Tracking and Evaluation System (ACF)	NIH Grants Management Infonet (NIH)	RADS Rate Agreement Distribution System (PSC)

CONTINUOUS DEMONSTRATIONS THROUGHOUT THE DAY:

Room A (SAMHSA)	Room B (OS)	Room F (NIH)	Room G (OS)
SGIMS: SAMHSA Grants Information Management System	PROPMAN: Personal Property Management	Commons IMPAC II NIH Grants Management Infonet NIGMS: Grants Management Software Applications	TAGGS: Tracking Accountability in Government Grants System GrantsNet Grants Management Office Tools

Sample Biographies

CHARLES BISH

Charles Bish is a Federal Assistance Policy Specialist in the Office of Grants Management (OGM), Department of Health and Human Services. OGM is responsible for overseeing the award and administration of mandatory and discretionary grants and other forms of Federal financial assistance throughout the Department. Mr. Bish has worked for the Department since 1992. Prior to that, he worked 13 years in grants operations at the National Endowment for the Arts. Mr. Bish is a graduate of the University of Virginia. He currently serves as Secretary of the National Grants Management Association.

CHARLES W. GALE

Charles Gale is the Director, Office of Grants Management in the Department of Health and Human Services (HHS). Mr. Gale has co-chaired the Governmentwide Grants Regulations Task Forces responsible for updating and revising OMB Circulars A-102 and A-110 as the representative of the largest Federal granting agency.

Mr. Gale has held several positions within the operating divisions of HHS (formerly the Department of Health, Education and Welfare) since 1972. He has worked in the grants and contracts arena since 1980, focusing primarily on mandatory and discretionary grants policy. Prior to entering Federal civilian service, Mr. Gale served in the U.S. Army and taught inner-city youth in Louisville, Kentucky. Mr. Gale is a graduate of Vanderbilt University.

Sample System Descriptions

IMPAC II

IMPAC II, the next generation successor to IMPAC, is the information system that supports all of the business requirements of the NIH extramural research program. It will be the backbone that enables NIH to conduct electronic research administration with extramural organizations. The presentation (Balcony B) will provide an overview of the system and how it relates to the Commons and electronic research administration. Computers will be available in the NIH demonstration room (Conference Room F) to access the database and further explore the system.

PMS

The Payment Management System (PMS) is used to process grant payments for 44 Federal agencies. PMS was developed to create a centralized system that is capable of paying most Federal assistance grants, block grants, and contracts. This presentation (Balcony C) will familiarize the audience with the overall operations of the Program Support Center's Division of Payment Management and PMS. The Smart link II grant fund request system, system connectivity options, and the Electronic PMS 272 reporting system will also be demonstrated.

PLANNING

Sample Conference Evaluation

**CONFAIR 1998
Grants Management Training Conference**

EVALUATION FORM: March 25, 1998 (Wednesday)

1. Please rate each of the first day sessions using the following scale:

1 = Excellent	2 = Good	3 = Fair	4 = Poor	NA = did not attend
---------------	----------	----------	----------	---------------------

<u>Session</u>	<u>Content</u>	<u>Delivery</u>	<u>Applicability to my work/interests</u>
a. Panel: Office of the Inspector General - Working Together with HHS Grants Management	_____	_____	_____
b. Panel: Electronic Linkages and the Extended Grants Community	_____	_____	_____
c. Achievements and Recognition in Grants Management	_____	_____	_____
d. Panel: Compliance Confidence and Cooperation	_____	_____	_____
e. The Research Grants Perspective	_____	_____	_____
f. State and Federal Perspectives on Grants Management and Program Accountability	_____	_____	_____

2. Please rate the facility:

	Excellent	Good	Fair	Poor
Room Size	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food/Beverages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The evaluation continues on the back of this page.



PLANNING

Sample Conference Evaluation (continued)

3. Did this conference meet your expectations?

4. List those things that were most helpful to you:

5. List those things that could be improved:

6. Please check the rating that best reflects your overall evaluation of this conference.

Excellent

Good

Fair

Poor

7. Other comments/suggestions are welcomed (including recommendations for topics or sessions at a future CONFAIR):

Optional:	<hr style="border: none; border-top: 1px solid black;"/>	<hr style="border: none; border-top: 1px solid black;"/>	<hr style="border: none; border-top: 1px solid black;"/>
	Signature	Agency	Telephone No.

Your evaluation is appreciated. Thank you!

Please return this form to the Registration Desk or FAX form to 703-691-3099 by March 31, 1998.

PLANNING

Sample Fair Evaluation

**CONFAIR 1998
Information Technology in Grants Management Fair**

EVALUATION FORM: March 26, 1998 (Thursday)

1. Please rate each of the second day presentations using the following scale:

1 = Excellent	2 = Good	3 = Fair	4 = Poor	NA = did not attend
---------------	----------	----------	----------	---------------------

<u>Presentation</u>	<u>Content</u>	<u>Delivery</u>	<u>Applicability to my work/interests</u>
a. Commons/IMPAC II	_____	_____	_____
b. GATES	_____	_____	_____
c. NIH Grants Management Infonet	_____	_____	_____
d. PMS	_____	_____	_____
e. RADS	_____	_____	_____
f. TAGGS	_____	_____	_____

2. Please rate each of the second day demonstrations using the following scale:

1 = Excellent	2 = Good	3 = Fair	4 = Poor	NA = did not attend
---------------	----------	----------	----------	---------------------

<u>Demonstration</u>	<u>Content</u>	<u>Delivery</u>	<u>Applicability to my work/interests</u>
NIH:			
a. Commons	_____	_____	_____
b. IMPAC II	_____	_____	_____
c. NIGMS: Grants Mgt. Software Applications	_____	_____	_____
d. NIH Grants Management Infonet	_____	_____	_____
OS:			
e. GrantsNet	_____	_____	_____
f. Grants Management Office Tools	_____	_____	_____
g. TAGGS	_____	_____	_____
OS:			
h. PROPMAN	_____	_____	_____
SAMHSA:			
i. SGIMS	_____	_____	_____

The evaluation continues on the back of this page.



PLANNING

Sample Fair Evaluation (continued)

3. Please rate the facility:

	Excellent	Good	Fair	Poor
Room Size	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food/Beverages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Did this fair meet your expectations?

5. List those things that were most helpful to you:

6. List those things that could be improved:

7. Please check the rating that best reflects your overall evaluation of this fair.

Excellent Good Fair Poor

8. Other comments are welcomed (including recommendations for topics or sessions at a future CONFAIR):

Optional: _____ Signature	_____ Agency	_____ Telephone No.
-------------------------------------	-----------------	------------------------

Your evaluation is appreciated. Thank you!

Please return this form to the Registration Desk or FAX form to 703-691-3099 by March 31, 1998.

Food and Beverage Planning



Researching catering firms can be a time-consuming process so reserve the caterer at least 3 months in advance. Most conference facilities will have a list of preferred caterers--firms that have successfully catered events at the particular facility.

When obtaining cost estimates from caterers, you will need to provide the caterers with the following information:

- Location of event
- Date of event
- Estimated number of guests each day
- Services desired
- Any spending cap that HHS may have on food and beverages (some catering firms may revise their menus to meet the HHS spending cap)

Make sure to ask the caterers for the following information:

- Description of services
- Menus (these can be mailed or faxed)
- Cost per person
- Options available (cost may increase or decrease depending upon option)
- Service charges
- Labor charges
- Accepted payment methods
- Total estimate per day
- Total estimate per person per day

A sample cost estimate sheet is provided on the next page.

PLANNING

Sample Catering Cost Estimate

Dates: March 25 - 26, 1998
Estimated Number of Guests: 300 per day
Services Desired: 1) Breakfast; 2) Bag/Box Lunch; 3) PM Break-Afternoon Sodas
Location: Natcher Conference Center - NIH Campus, Bethesda

Guest Services, Inc. 45 Center Drive - NIH Bethesda, MD 20892		Contact: Scott Dimmick (Director of Food Service for Natcher Conference Center)		Telephone: 301-402-9701 FAX: 301-402-9892	
<i>Item</i>	<i>Description</i>	<i>Cost</i>			
Breakfast: "The Bakeshop Breakfast"	Bakery fresh selection of muffins, scones, bagels, homemade breakfast breads and donuts with a selection of bottled juices and hot beverages.	300 @ 4.75 pp	1425.00		
Lunch: "The Brown Bag Lunch"	Herb roasted turkey, round of beef, Virginia ham, tuna salad, chicken salad, or vegetarian selection on plain or whole wheat Kaiser. Accompanied by a small bag of chips or pretzels, cookies or piece of fruit, and canned soda. Bags are color-coded - a chart will identify the contents of each color. HHS should choose 4 of the above 6 sandwich choices.	300 @6.50 pp	1950.00		
PM Break	Assorted canned sodas	25 dozen	223.75		
Food Subtotal			3598.75		
Service Charge		18%	647.78		
Services/Labor	Linen skirting; 3 setups and breakdowns per day; 2 attendants to replenish items.		225.00		
TOTAL PER DAY			4471.53		
TWO-DAY TOTAL			8943.06		
Approximate price per person over two days, assuming 300 people = \$ 15.00					
Payment Method: Invoice to purchase order <i>or</i> check or credit card at end of event.					
Breakfast option: "Simple and Straightforward" - Assorted fresh donuts with Colombian coffee and gourmet teas (3.00 pp = 900 x 2 days = 1800.00).					
PM Break option: "Soda and Cookies" - Assorted freshly baked cookies and canned sodas (2.75 pp = 825 x 2 days = 1650.00).					

Hotel and Travel Arrangements



The people attending or presenting at the training conference or technology fair may or may not be located in the local area. If anyone is coming from out-of-town, answers to the following questions will be useful.

Hotel

- How many overnight speakers/presenters will there be?
- How many overnight attendees will there be?
- Will HHS or the attendees make the hotel reservations? Will HHS reserve a block of rooms?
- Who pays for the hotel?
- Will there be any perks for the speakers/presenters?
- How will transportation be handled to and from the hotel?
- Does the conference/fair facility have a list of hotels in the vicinity?

Travel

- Who pays for travel?
- How do we get an overview of the location and accessible travel modes?
- What provisions are available for attendees from major transportation sites and hotels?

Dry Run



A complete on-site dry run may or may not be feasible as conference/fair facilities are often very busy with other events.

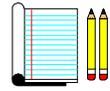
Training Conference

If a dry run of the training conference is possible, speakers should bring with them laptop computers, slides, or overhead transparencies--whatever is required for their presentations. The audiovisual technicians will ensure compatibility with computer projection, slide projection, and overhead projection equipment. In addition, speakers can take the opportunity to familiarize themselves with the equipment and procedures.

Technology Fair

Probably more important than a dry run of the training conference is a dry run of the systems to be presented during the technology fair. Testing the compatibility of the systems with the facility's equipment and capabilities is a crucial part of assuring that the presentations will go smoothly, without any technical difficulties. Try to do this testing at least one week in advance of the technology fair so that time is available for presenters and audiovisual technicians to determine appropriate settings and requirements.

Miscellaneous Preparations



Supplies

The following supplies should be purchased in advance and brought to the facility preferably the day before the event.

- Pens and containers for pens
- Note pads
- Chart paper (unless presenters are bringing their own)
- Dry erase markers and erasers
- Masking tape
- Copy paper (if extra photocopies may be needed)

Badges

Producing badges can be time-consuming, so start the process as soon as you have a semi-complete list of registrants. Any office supply store will have laser printer badge making kits. Include the registrant's full name and organization on each badge. Make sure to create badges for all speakers and presenters as well. Badges can be used as a form of monitoring who has registered and, thus, who is to be provided with a lunch.

Tent Cards

Create a tent card for each speaker in the training conference and for each system being demonstrated in the information technology fair. These can be created from a laser printer tent card making kit.

Signs

Signs for the training conference and technology fair can be produced in-house or by a vendor. From experience, it is quite a bit less expensive to do this in-house. Make sure to measure the dimensions of the facility's easels so that you know the size of the foam board to be used. Have a sign(s) for each of the following:

- Sign for the training conference
- Sign for the technology fair
- Sign for each conference room with name the of the specific presentation or demonstration. If one conference room is being used for various presentations at different times, make sure to include the schedule on the sign.
- Signs for the registration area (e.g., Registration, A-H, I-Q, R-Z)

PART III. ADMINISTRATION

Facility Communications



It is of utmost importance to be in frequent communication with the facility coordinator. He or she will be your lifeline to fulfilling any needs that may arise during the event.

Before the date of the event, make sure to provide the facility coordinator with a final agenda so that everyone is sure to have the same times and rooms for each presentation.

Employing a dedicated AV technician is essential, especially for a technology fair. The AV technician will help with setting up and help in the event of an AV problem. Make sure to discuss the AV needs of each room well in advance so that each room can be set up with the proper specifications.

Registration Services



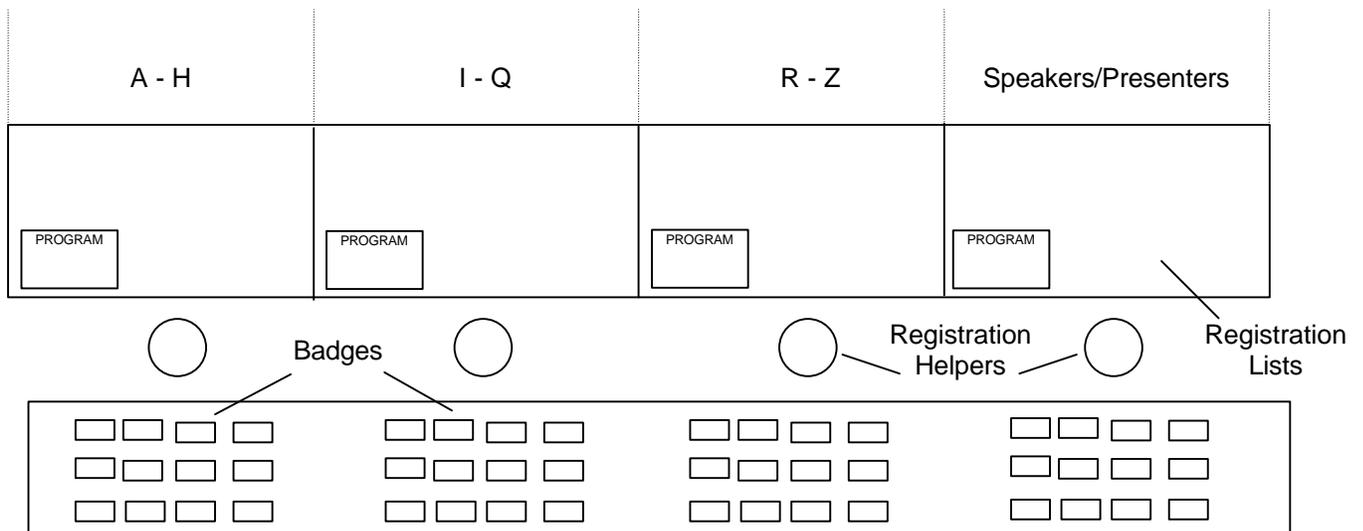
For either a training conference or technology fair, HHS employees should explain and provide written instructions to the registration helpers to ensure the registration process runs smoothly. An HHS employee should supervise the registration helpers at least for the first hour until he or she feels comfortable the helpers can run the registration table on their own. In addition, the HHS employee should be present at the registration table to handle any specific inquiries or problems that may arise.

Registration Lists

A registration list is a list of registrants arranged alphabetically by last name. There should be three lists that coincide with the registration signs (e.g., A-H, I-Q, and R-Z). Each registration helper should be assigned one of these three registration lists and sit in front of the corresponding registration sign. There should be a separate registration list for speakers/presenters.

Registration Table Set-up

The diagram below provides a possible set-up for the registration area.



Walk-in Registration

In a few cases, people may show up that have not pre-registered. If this happens, they should complete a walk-in registration form. A sample form is included on the next page.

Sample Walk-In Registration Form

CONFAIR 1998

**Grants Management Training Conference
and
Information Technology in Grants Management Fair**

WALK-IN REGISTRATION

Name: _____

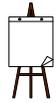
Agency/Office: _____

Telephone: _____

Appropriation Number: _____

(If you do not know the Appropriation Number,
please indicate the Name and Telephone Number of
your Administrative Officer): _____

Setting Up



Training Conference

- ☐ Place the training conference signs outside of the room(s) where the conference will take place. If there are two doors to a room, use two signs.
- ☐ If there will be a panel, set up the panel table with enough chairs to accommodate the largest panel.
- ☐ Ensure that the water pitcher is refilled with fresh water and that fresh glasses are provided with each panel session.
- ☐ Place tent cards with panelists' names near the front of the panel table. Change these tent cards between panel sessions.
- ☐ Ensure a trash can is nearby for panelists, speakers, and others on stage to use.
- ☐ If there will be an awards session, set up a table for the awards. If there are certificates, ensure that they are open and that the names are visible.
- ☐ Ensure that there are chairs for speakers and the moderator.
- ☐ Rope off or tape off reserved seats for speakers and awardees in the first rows of the room.

Technology Fair

- ☐ Have the facility arrange for the appropriate number and arrangement of tables and chairs in each room, as well as table draping.
- ☐ Ensure that an easel and chart paper are in each room where required.
- ☐ Ensure each room has dry erase markers and erasers.
- ☐ Place the appropriate sign outside the room where each presentation or demonstration will take place.
- ☐ Place tent cards with system name on appropriate tables in each room.

PART IV. POST-EVENT ACTIVITIES

Evaluations



Evaluation forms (see pages II-21 to II-24 for samples) will provide valuable information to use in ensuring that future training conferences or technology fairs are as successful as possible. Data from the evaluations should be consolidated and a mean rating reported for each question. Comments, suggestions, and other written answers should be consolidated as well. The mean ratings and the written comments should be analyzed and an evaluation report developed.

The evaluation report should include, at a minimum, the following items:

- Overview
- Evaluation measure
- Training conference findings
- Technology fair findings
- Conclusions
- Raw data
- Original evaluation forms

Attendance Roster



A roster of attendees should be prepared that includes the name of the registered attendee, the organization, whether or not they attended, and if not, the name of the replacement if any.

A summary of the following should be included as well:

- Number of attendees
- Number of speakers (training conference)
- Number of presenters (technology fair)
- Number of guests
- Number of contract support personnel
- Total number

A sample page of an attendance roster follows. The format may be changed or augmented to fit future needs.

POST-EVENT ACTIVITIES

Sample CONFAIR Attendance Roster

Attendees	255
Speakers	15
Presenters	24
Guests	6
Contractor	2
2-DAY TOTAL	302

REGISTERED NAME	ATTENDED (Yes/No)	REPLACEMENT
ASPE		
1. Frank, Adreas	Yes	
2. Little, Adrienne	Yes	
3. Silva, Richard	No	No replacement
PSC/FMS		
1. Abeya, Mia	Yes	
2. Anzulis, Cathy	No	No replacement
3. Bowman, Julia	Yes	
4. Brown, Pearl	Yes	
5. Howell, David	Yes	
6. Kelly, Nicole	Yes	
7. Nolan, James	Yes	
8. Robedeau, Holly	Yes	
9. Teague, Faye	Yes	
10. Verma, Chitra	Yes	
SSA		
1. Allshouse Jr., David	Yes	
2. Smith, Joe	Yes	
NIH/NIGMS		
1. Bruce, Cecilia	Yes	
2. Chick, Cheryl	Yes	
3. Clark, Bryan	Yes	
4. Clarke, Lucy	Yes	
5. Cohn, Marcia	Yes	
6. Finch, Phyllis	Yes	
7. Gardner, George	Yes	
8. Grissom, Irene	Yes	
9. Hanople, Annette	Yes	
10. Holland, Toni	Yes	
11. Molnar, Patrice	Yes	
12. Pitts, Marc	Yes	

POST-EVENT ACTIVITIES

Thank-you Letters

**THANK
YOU!**

Thank-you letters should be prepared and sent to all training conference speakers and technology fair presenters. Sample formats for these letters follow.

Sample Thank-You Letter For Training Conference Speaker

April, 3, 1998

Mr./Ms. [Speaker Full Name]
[Organization]
[Street Address]
[City, State ZIP]

Dear Mr./Ms. [Speaker Last Name]:

Thank you for taking the time from your busy schedule to speak at the Grants Management Training Conference and Information Technology in Grants Management Fair (CONFAIR 1998). You played a very important role in making CONFAIR 1998 a success.

Both individual speaker and panel sessions received very good ratings based on evaluation forms and verbal conversations. Some of the words used to describe these sessions include: timely, relevant, interesting, excellent, important, and informative.

I hope you benefited from CONFAIR 1998 as well. It was a good venue for sharing information and networking with colleagues both in and out of the grants management field.

Thank you again for a job well done. Without your assistance, CONFAIR 1998 would not have yielded the success it did.

Sincerely,

Charles Gale
Director, Office of Grants Management, ASMB

POST-EVENT ACTIVITIES

Sample Thank-You Letter for Technology Fair Presenter

April, 3, 1998

Mr./Ms. [Presenter Full Name]
[Organization]
[Street Address]
[City, State ZIP]

Dear Mr./Ms. [Presenter Last Name]:

Thank you for taking the time from your busy schedule to serve as a presenter at the Grants Management Training Conference and Information Technology in Grants Management Fair (CONFAIR 1998). You played a very important role in making CONFAIR 1998 a success.

The system presentations and demonstrations received very good ratings based on evaluation forms and verbal conversations. Some of the words used to describe these sessions include: important, informative, insightful, comprehensive, and fun.

I hope you benefited from CONFAIR 1998 as well. It was a good venue for sharing information and networking with colleagues both in and out of the grants management field.

Thank you again for a job well done. Without your assistance, CONFAIR 1998 would not have yielded the success it did.

Sincerely,

Charles Gale
Director, Office of Grants Management, ASMB