

OpMan 41 - Conference Planning, Operations, and Reporting

Effective Date: 19 Mar 2015
Updated and Approved: 17 June 2016
Updated and Approved: 16 June 2017
Updated and Approved: 26 Apr 2019

1. **Purpose:** To provide guidance for coordination, planning, and operations of AOC-sponsored US and International conferences.
2. **General:** The AOC has traditionally been involved in the operation of conferences and maintains the capability to assist various interested parties (chapter or government entity) in offering conferences. The objective of AOC conferences is to advance international policy, programs, and professional development while providing a venue for the exchange of ideas and information on current and emerging technology and capability gaps with regard to Electromagnetic Spectrum Operations. Proceeds from AOC-sponsored US and international conferences are intended to support local scholarship programs, augment chapter operating budgets, and provide revenue for sustainment and execution of future conferences.

All AOC conferences will be aligned with AOC Brand Guidelines, AOC Bylaws (OpMan 13), AOC Strategy (OpMan 14), AOC Code of Ethics (OpMan 15), Conducting Classified Events (OpMan 51) and Non-Discrimination Policy (OpMan 18). Additionally, AOC observes all US laws designed to prevent the export of sensitive technology and technology implementation, and to protect American and international partner technological accomplishments from potential adversaries. The AOC Bylaws contain stipulations about persons or entities that are not eligible for membership in the AOC, to attend Technical Symposium or Exhibits, or to participate in AOC events. OpMan 13, Appendix A, provides a specific list of countries (periodically updated) to determine person or entity eligibility status. All conference planning and execution shall be in compliance with OpMan 13.

3. **Applicability:** This OpMan covers AOC Conference coordination, planning, and operations for US and International conferences at three escalating levels of detail:
 - a. Strategic (or multi-year) high-level conference plan with proposed dates, themes, sites, and leads (revised on an annual basis);
 - b. Next Year conferences with further detailed estimates of revenue/expenses and agenda (in time for Annual Budget review); and
 - c. Conference detail planning with milestone reviews prior to conference start.

AOC Regional and Chapter conferences, as well as virtual webinars, are managed outside the scope of OpMan 41; however, these events are required to be in compliance with all relevant OpMans.

4. **Responsibility:** The AOC Conference Committee is responsible for the development and oversight of all conference planning, operations and reporting guidelines (OpMan 41). In addition, this

Operations Manual

Committee performs overall conference scheduling, development, and coordination of all AOC-sponsored US and international conferences.

5. **Conference Coordination:** Coordination and de-confliction of AOC conferences with AOC Regions, AOC Chapters, and other similar purpose organizations (such as AFCEA, DEPS, etc.) will be the responsibility of the AOC Conference Committee. Some of the issues that may arise from not coordinating are overexposure of themes, over-demand on common sponsors, diminished conference value to our membership, and loss of AOC revenue.
 - a. AOC Symposium & Convention. This committee will coordinate the Annual Symposium & Convention with the AOC Conference and International Advisory Committees.
 - b. Global Conferences. The International Advisory Committee will coordinate global conference events with the AOC Conference Committee
 - c. Regional and Local Chapter Conferences. It is the responsibility of an AOC chapter or region that is planning an AOC conference to coordinate the conference schedule with the AOC Conference Committee and the AOC staff.

6. **Conference Planning:**

A few major planning considerations include the following:

- a. Identify target audience and possible sponsors
- b. Review Logistics Partnering Agreement and cost-sharing strategy
- c. Review purpose and scope of the MOA/MOU highlighting typical roles and responsibilities
- d. Review marketing plan

7. **US Conference Operations:**

- a. Staffing: US conferences are managed by the AOC Meetings & Events staff by employing an individual who manages each US Conference event and liaison with other AOC staff, Executive Director, AOC Conference Committee, and Conference Event teams.
- b. Conference Scheduling: The Conference Committee Chair will present to the AOC BOD updates to the conference schedule. AOC Meetings & Events staff provides coordination and support to AOC Conference Committee for potential conferences to help develop next year's planned conference schedule. Every attempt will be made to deconflict all AOC conferences with other professional events.
- c. Conference Event Planning: The Conference Event team shall be comprised of the interested parties (chapter and/or government entity), AOC Conference Committee, Conference Event Leads and AOC staff. This team should plan the Conference using a routine meeting schedule (timeline). If a Government sponsor approval process is required, the approval timeline is key for conference success.
- d. **Note:** A Memorandum of Agreement or Understanding (MOA or MOU), that is drafted or approved by the Command's Judge Advocate General (JAG), and signed by AOC Executive

Operations Manual

- Director, may be required. In addition, Military and DoD Civilians attending or speaking at AOC Conferences may require OSD's or Department's Assistant for Administration (AA) approval prior to travel authorization. Sufficient time to achieve DoD approval is required to support coordination and travel plans for event speakers, sponsors, and participants.
- e. Conference financial viability: The Conference Event team will build a financial budget plan along the following guidelines.
 - i. Gather key financial information from the conference team:
 - 1. Estimated number of registrants and set registration fee(s)
 - 2. Potential for possible sponsorship monies and estimated revenue
 - 3. Facilities costs
 - 4. Reception and meal costs
 - 5. Other Conference supplies
 - 6. Travel costs for speakers (must be approved by Executive Director)
 - ii. Prepare proposed budget (AOC staff) using information from conference team, and include:
 - 1. Estimated staff travel costs (must be approved by Executive Director)
 - 2. If appropriate, estimate for AOC president and/or representative travel (must be approved by Executive Director)
 - 3. Marketing cost
 - 4. Chapter Scholarship contribution
 - 5. Staff and overhead cost
 - iii. Finalize propose budget with conference lead and Executive Director
 - iv. Review proposed budget with AOC Conference Committee Chair and obtain AOC Conference Committee Chair and Finance Committee Chair approval to move forward
 - v. Conference Committee to report financial viability at each BoD meeting.
 - f. Implement Logistics Partnership Agreement (LPA) with local site
 - i. Send sample LPA to conference lead (see Appendix D for LPA Template)
 - ii. In joint meeting between AOC staff and conference lead, highlight appropriate changes to LPA
 - iii. Finalize LPA and obtain signed copy for file

8. Global Conference Operations

- a. HQ Staffing: Global conferences are managed by the AOC staff by employing a Conference Event Lead who manages conference events and liaises with logistics partners, Executive Director, AOC staff, and the International Advisory Committee (IAC) for each event.
- b. Conference Scheduling: At each BoD meeting, the International Advisory Committee Chair will brief schedule updates to the annual conference schedule. Every attempt will be made to deconflict all AOC conferences with other professional events.
- c. Conference Event Planning: The Conference Event team shall be comprised of AOC International Advisory Committee, Conference Event Lead, AOC appointed staff and logistics partner. This team should plan the conference using a routine meeting schedule (timeline).

Operations Manual

- d. Conference financial viability: The Conference Event Lead will work with the logistics partner to build a financial budget plan.
 - i. Conference Lead to share finalize proposed budget with International Advisory Committee and Executive Director
 - ii. International Advisory Committee to report financial viability and registration stats at each BoD meeting.
9. **Chapter Contribution**: In those instances where AOC co-sponsors an event, the AOC staff and board committees (Conference Committee and International Advisory Committee) will coordinate to conduct an event near or in conjunction with a local chapter. The AOC will provide a chapter contribution based on proceeds realized from the event. This includes US and International co-sponsored events with the exception of those events with individual agreements.
- a. Proceeds: The chapter contribution amount will be based proceeds from the event after accounting for all revenue and expenses, to include AOC staff labor and travel required to support the planning and execution of the event.
 - b. Chapter Contribution Structure: A standard tiered chapter contribution structure will be incorporated into each Logistics Partnership Agreement (See Appendix D)
 - d. Chapter Participation: Chapter contribution levels assume moderate to significant chapter involvement in the planning and execution of the event. For those chapter events with minimal local participation, the chapter contribution will be reduced by 50%. No chapter contribution will be provided when there is no local chapter participation.
 - e. International Events: With the exception of those events with individual agreements, all AOC co-sponsored international events will follow a tiered chapter contribution structure.

Any deviation from these criteria will be at the discretion of the Executive Director.

10. Reporting and Reviews

- a. AOC Conference Staffing: AOC staff requirements will be reviewed quarterly by AOC Executive Director for hiring of temporary or full-time conference support personnel
- b. Pre-Conference Review
 - i. AOC Meetings & Events staff will provide periodic updates to AOC Conference Committee Chair regarding status of registration numbers and sponsorship revenue.
 - ii. Significant deviations from approved budget which might impact overall revenue expectation/outcome will be reported to AOC Conference Committee Chair and AOC Treasurer.
 - iii. Conference Committee Chair will provide an AOC Conference Update Report during AOC Board Meetings
- c. Post Conference Review. A comprehensive review (hot wash) shall be conducted with the entire conference team for each conference to include documenting lessons learned.

PRE-CONFERENCE QUESTIONS

This Appendix includes questions that should be considered when developing or supporting a conference.

- What is the purpose of the conference?
- Is the topic of interest to AOC members?
- Is the topic aligned with AOC Strategic goals?
- How long since the last conference with a similar topic?
- Are there other events occurring that might compete with the selected date or venue?
- What are the measures of Conference success?
 - Are the measures quantifiable?
- Is there solid probability of financial success?
 - Is Sponsorship revenue assured?
 - Is Registration Fee model proven for this site and forecasted participants?
 - Has an estimate of conference costs been completed?
- Is there availability of suitable volunteer leadership?
- Is there availability of volunteer conference logistics support?
- Is there other similar for-profit or non-profit events?
- Are there opportunities for cooperation and collaboration?
- Will this conference require DoD or Service approval to enable government personnel to attend or travel?

CONFERENCE PLANNING TASKS AND SCHEDULE PLANNING TASKS

1. Identify conference leads (conference chair and other leads). It is recommended that the Conference Chair is local to the Event site.
2. Determine if proposed theme is compatible with the mission and objectives of the AOC and other planned AOC conferences
3. Identify target audience and possible sponsors. Estimate number of attendees from various groups (military, governmental, industry, etc.) and review registration fee strategy
4. Identify event date
5. Determine if adequate lead time is available to secure necessary approvals
6. Outline schedule of events and activities
7. If classified sessions are envisioned, review security requirements in accordance with OpMan 51.
8. Identify facilities requirements
9. Ensure that adequate manpower is available (such as volunteers) to handle envisioned scope of activities/events. Also, discuss AOC level of effort and staffing needs.
10. Determine if AOC President or representative is a desired participant during event (key note speaker/ welcome address)
11. Review purpose and scope of standard MOA/MOU highlighting typical roles and responsibilities
12. Review marketing plan (website, email blasts, base newspapers, etc.)
13. Review typical conference planning work plan and schedule of necessary coordination meetings
14. AOC Staff will notify AOC conference lead that AOC will need to prepare a sample budget to assess the financial viability of the proposed conference.
15. AOC Conference Committee Chair approval will be required at least 60 days prior to start of Conference. Exceptions to the time requirement will be approved by the Conference Committee

Conference Planning Tasks and Schedule

Planning Schedule

ACTION

MILESTONES

(Conference date less months/weeks)

• Multi-Year Conference Plan	August
• Next Calendar Year schedule/Board approval due	Aug Prior Year
• Establish the need for a conference	12 months
• Determine purpose of conference	12 months
• Identify target audience	12 months
• Determine title of conference	12 months
• Determine date of conference	11 months
• Determine site of conference	11 months
• Determine classification of conference	11 months
• Identify location for conference	11 months
• Identify facility at conference site	11 months
• Obtain security sponsorship	11 months
• Identify any special requirements at conference site/facility - (e.g., flight line requirements/security)	11 months
• Identify conference chairman/program coordinator	11 months
• Select session chairman, if appropriate	10 months
• Develop marketing plan	08 months
• Develop logistics plan	08 months
• Develop budget	08 months
• Initiate Conference Approval process to ensure DoD travel	11-06 months
• Draft proposed program	11-04 months
➤ Identify keynote speaker	
➤ Determine sub-themes of sessions	
➤ Determine topics	
➤ Identify speakers or organizations	
• Confirm keynote and speakers	06 months
• Execute marketing plan	05 months
• Final program due for e-brochure	04 months
• Schedule bi-weekly meetings	04 months

AOC Operational Manual 41 Appendix B

- Brochure to email 03 months
- Conference Chair approval 02 months
- Schedule weekly meetings 02 months
- Brochure to e-mail 02 months
- Brochure to e-mail 04 weeks
- Prepare final program 01 week
- Conduct conference 00 week
- Quick look conference report +01 week
- Lessons Learned meeting +02 week
- Conference Report +02 month

Sample Conference Cost Estimate

Sample Conference						
<i>Location</i>						
<i>Date</i>						
<i>Today's Date</i>						
GL	Revenue	#	Unit Price	Budgeted Revenue	Actual	
	Registration (Ave. reg fee \$xxx)	0	\$0	\$0.00	\$0.00	
	Sponsorship			\$0.00	\$0.00	
	TOTAL REVENUE			\$0.00	\$0.00	
EXPENSES		#	Unit Price	Budgeted Expenses	Actual (to date)	Sunk Costs
	Admin and overhead					Previous Year
	Welcome Reception			\$0.00	\$0.00	\$0.00
	Reception #1			\$0.00	\$0.00	\$0.00
	Reception #2			\$0.00	\$0.00	\$0.00
	Facility Rentals (ex. Exhibit Area, Tents, Material)			\$0.00	\$0.00	\$0.00
	Venue Catering			\$0.00	\$0.00	\$0.00
	Security			\$0.00	\$0.00	\$0.00
	Catering for golf outing			\$0.00	\$0.00	\$0.00
	Agenda Printing			\$0.00	\$0.00	\$0.00
	Upcoming Conferences Flyer Printing			\$0.00	\$0.00	\$0.00
	Starbucks Gift Cards			\$0.00	\$0.00	\$0.00
	Supplies			\$0.00	\$0.00	\$0.00
	Sponsorship Split			\$0.00	\$0.00	\$0.00
	Speaker Travel/Cmte Mtgs			\$0.00	\$0.00	\$0.00
	Speaker Gifts			\$0.00	\$0.00	\$0.00
	Marketing			\$0.00	\$0.00	\$0.00
	Coins/Awards			\$0.00	\$0.00	\$0.00
	Volunteer Thank you Event			\$0.00	\$0.00	\$0.00
	Raffle Gifts (membership department)			\$0.00	\$0.00	\$0.00
	Signage			\$0.00	\$0.00	\$0.00
	Shipping			\$0.00	\$0.00	\$0.00
	Staff travel (# of staff)			\$0.00	\$0.00	\$0.00
	Chapter scholarship donation			\$0.00	\$0.00	
	TOTAL EXPENSES			\$0.00	\$0.00	
	TOTAL REVENUE			\$0.00	\$0.00	
	PROFIT - LOSS			\$0.00	\$0.00	

LOGISTICS PARTNERSHIP AGREEMENT

BETWEEN

[Insert AOC Local Chapter]

AND

THE ASSOCIATION OF OLD CROWS (AOC)

TO HOLD THE

[Insert conference name]

This agreement between [insert AOC Local Chapter] and the AOC establishes the roles and responsibilities for the parties in partnering in the [insert conference name] to be held [insert event month, date, year] at [insert location].

Roles and Responsibilities

The AOC shall be responsible for:

1. The administrative, logistical, financial, promotional and all other logistical requirements for the conference.
2. Contract with hotel and other vendors for accommodations and service, to include, food and beverage, transportation, photocopying, faxing, printing, logo and ad design (graphics), and audio/visual support, etc. as required. Individual hotel accommodations and travel arrangements will be the responsibility of the individual participant or organization.
3. Maintain responsibility for all activities associated with conference publicity, which will be coordinated with [insert AOC Local Chapter]
4. to include advertisements (JED ads, dedicated blast emails, weekly eCrow electronic newsletter), flyers, printing, mailings, registration forms, and post event evaluations.
5. Maintain responsibility for all activities associated with registration, to include pre-registration management (on-line and paper forms), on-site registration procedures, registration confirmations, receipts and invoices, printing and distributing name badges and attendee lists, etc.
6. Provide a list of attendees, to include addresses, for issuance of security badges in coordination with the security sponsor.
7. Speaker management, to include collecting speaker release forms, bios, registration forms, and briefings after speakers are confirmed. Speaker contact information, including email addresses, will be provided in a timely manner to AOC for this effort.
8. Function as the on-site point of contact to handle all logistical activities described and ensure that supporting personnel are available for such duties.
9. Update and maintain the conference website.
10. The AOC shall be financially responsible for all obligations, assessments and attendant fees for this conference.
11. The AOC will collect registration and/or sponsor fees from industry participants to recover the reasonable costs incurred for promoting and coordinating the conference. The AOC is waiving the registration fee for all military and government civilians with a civilian CAC card. The AOC will absorb any financial loss or retain and excess funds after paying all expenses related to this conference, although there is no expectation of excess funds.
 - a. Industry attendee fees pay for the following: web site presence, web site registration, registration database, conference advertisement, food and beverage, transportation,

- audio/visual equipment rental if needed and other administrative and logistical costs of the AOC putting on the conference.
- b. Military and Government attendees have the option to pay [insert amount \$x] for a meal package. AOC will collect these fees to offset the cost of the catering.

The [Insert AOC Local Chapter] shall be responsible for:

1. Designate a point of contact to ensure the implementation of this agreement.
2. If any part of the event will be classified, review the AOC Security Policy Memo (attached) for compliance with applicable security regulations.
 - a. Must obtain a US Government sponsor willing to assume responsibility for verification of attendee clearances, need-to-know for the information to be discussed at the conference, and all other NISPOM-related requirements, to include:
 - i. Government sponsor to act as the security sponsor for the conference.
 - ii. Conduct all security procedures for the conference.
 - iii. Prepare security site plan for the conference if needed.
 - iv. Process all JPAS and security clearance administrative functions for the conference.
 - v. Manage the storage and/or distribution of all classified materials created by, or distributed at, or presented during the conference.
 - vi. Verify the security approval of all papers/briefings to be presented, and approving all classified presentations and speakers for the conference.
 - vii. Approve all announcements and advertisements for the event which reference that classified information will be disclosed.
 - viii. Manage the security on-site for the conference if necessary.
3. Write the purpose of the conference and identify the target audience for marketing purposes.
4. Develop a conference agenda in such a way as to ensure a relevant discussion of issues and be responsible for final scheduling of agenda and speakers. Provide agenda in format usable for agenda to be published on the conference website and in final printed program.
5. Identify the conference chairman, session chairmen, theme, keynote address, program topics and inviting and securing event speakers.
6. Develop a schedule for conference preparation tasks/milestones
7. Secure the classified conference facility.
8. Work in conjunction with the AOC to obtain presentations and release forms from the speakers.
9. Provide volunteers as needed.
10. Any chapter functions held in conjunction with the conference will be the sole responsibility of the chapter (i.e. chapter golf outing, chapter awards, scholarship event, seminar, etc.)

Financial

Non-Federal Entity (NFE) sponsorship are allowed per the MOU between the AOC and [government co-sponsor]. All sponsorship monies will be paid directly to the AOC.

From a financial stand point, for direct support of the conference, AOC HQ will provide a chapter contribution to the [Insert AOC Local Chapter] after consideration of all event revenue and expenses (to include AOC staff labor and travel). This proceed-sharing model incorporates chapter contribution caps as a management control measure to protect the best interests of AOC, while recognizing chapters who co-host AOC conference events.

Chapter contributions are categorized into 6 proceed-sharing tiers as follows:

Net Proceeds ≥	Net Proceeds <	Chapter Contribution
\$0	\$2,500	\$750
\$2,500	\$7,500	\$1,500
\$7,500	\$15,000	\$3,000
\$15,000	\$30,000	\$6,000
\$30,000	\$45,000	\$10,000
\$45,000		\$15,000

Chapter contribution levels assume moderate to significant chapter involvement in the planning and execution of the event. For those chapter events with minimal local participation, the chapter contribution will be reduced by 50%. No local chapter participation will result in elimination of the chapter contribution. Any deviation to this reduction will be at the discretion of the Executive Director.

Qualifying funds will be paid to the [Insert AOC Local Chapter] after the event financial account is finalized and will be settled no later than 90 days after the event's conclusion.

Any modifications to this agreement must have mutual consent and be made in writing.

This Agreement is effective upon signature of both parties.

Signed:

 [Insert President Name]
 President
 [Insert AOC Local Chapter]

 Shelley Frost
 Executive Director
 Association of Old Crows

CHAPTER CONTRIBUTION STRUCTURE

This Appendix covers the current chapter contribution structure and will be implemented in all US and International Logistic Partnership Agreements.

1. Chapter Contribution. Chapter contributions are categorized into 6 Tiers as shown in Table 1 below.

Proceeds ≥	Proceeds <	Chapter Contribution
\$0	\$2,500	\$750
\$2,500	\$7,500	\$1,500
\$7,500	\$15,000	\$3,000
\$15,000	\$30,000	\$6,000
\$30,000	\$45,000	\$10,000
\$45,000	\$60,000	\$15,000
\$60,000		\$20,000

Table 1. Chapter Contribution Tiers

International Events: To account for the opportunity cost that international events pose to the chapters in International Region I and II, 5% of the proceeds from an international event (such as EW Europe and EW Asia) will be divided amongst participating chapters, or \$2,000 per chapter, whichever is greater. The criteria for chapters to be eligible for a contribution will be determined by the International Advisory Committee and agreed by the BoD and Executive Director.

Participation requires advanced coordination with the International Advisory Committee, and approval by the Executive Director. All other AOC co-sponsored international events will follow the six-tiered chapter contribution structure.

AOC Conference Report

(Post Conference Report does not need to fit this format, but metrics listed should be included in report)

- **Conference Description**

1. Name of Conference
2. Location and Dates
3. Conference Security Classification
4. Conference Theme, Key Topic(s), or Discussion

- **Conference Participation**

1. Number of Attendees (paying and complimentary, home location of attendees (#'s))
2. Keynote Speaker(s)
3. Sponsors
4. Exhibitors
5. Conference Support Personnel (AOC Staff, Chapter Volunteers, Others)
6. Senior AOC Representative in Attendance
7. VIPS in attendance (*if available*)

- **Conference Value**

1. Revenue
 - a. Attendance Fees (Early registration, Civilian/Military, Retiree, Student, ...)
 - b. Sponsors
 - c. Exhibitors
2. Cost
 - a. Major Conference Costs (facilities, meals, handout materials, receptions, ...)
 - b. AOC Staff Labor (how to calculate?)
 - c. Chapter Costs
 - d. Travel Costs (who is counted in this – AOC Officers, Staff, Conference personnel, etc.)
3. Overall Revenue Generated (+ or -)
4. AOC Strategic Goal Alignment Statement
5. Conference Non-financial Value:
 - a. Published Articles, Technical Reports, Media
 - b. Number of Presentations, Sessions, other activities (Conference agenda is okay) Side Meetings (e.g. DOD or Corporate Leadership, AOC, Service or Program Meeting ...)
 - c. Exhibitor and Participant Feedback
6. Action Items (if assigned)
7. Issues / Recommendations
8. Lessons Learned