



AZPTA PROGRAM PLANNING, BUDGET DEVELOPMENT AND FEE PRICING GUIDELINES

- I. For open enrollment meetings base minimum number expected on average of previous three (3) years for same meeting.
- II. For limited enrollment meetings base prices on minimum number necessary to hold meeting.

CALCULATING PROJECTED PROGRAM REGISTRANT EXPENSES:

Use the following cost categories to estimate the program expenses:

1. Contract Employees (if applicable)
2. Speaker Expense
 - (a) Honorarium(s)
 - (b) Travel
 - (c) Lodging
 - (d) Per diem
 - (e) Supplies
 - (f) Other
3. AV Rental
4. Venue Fees
 - (a) Meeting room rental (if any)
 - (b) Meals (broken down by function including tax and service fee or gratuity)
 - (c) Other
5. Entertainment – if not priced separately
6. Postage (Office Estimate)
7. Printing (Office Estimate)
 - (a) Brochures
 - (b) Other
8. Registration Expense (Office Estimate)
 - (a) Registration packets and related materials
 - (b) Badges
 - (c) Staff travel and lodging costs
 - (d) Other

Total Program Registrant Expenses

\$ _____

Use accompanying spreadsheet to record, update and total expenses.

FEE PRICING GUIDELINES:

- Member Early Bird Registration Fee
 - Calculate the total expenses, divide by the projected minimum attendance, and add 30%.
 - Early Bird registration ends three weeks prior to the meeting.
- Member Regular Registration Fee:
 - Add \$20 to registration fee after Early Bird registration period ends.
 - Add an additional \$25 for on-site registration to the Regular registration fee.
- Student Member Early Bird Registration Fee (applies to open enrollment meetings only; no student rate will be established for limited enrollment meetings)
 - Total of actual projected costs per person for all expenses (no profit included).
 - Early Bird registration ends three weeks prior to the meeting date.
- Student Member Regular Registration Fee:
 - Add \$10 to registration fee after Early Bird registration period ends.
 - Add an additional \$25 for on-site registration to the Regular registration fee.
- Non-Member Fees
 - Add 100% to Member Early Bird Registration Fee.
 - Early Bird registration ends three weeks prior to the meeting.
 - Add 100% to Member Regular Registration Fee.
 - Add an additional \$25 for on-site registration to the Non-Member registration fee.
- Multiple Registrants from Same Facility Discounts
 - Established at the discretion of the First Vice President
 - Second registrant from same facility discount – 5%
 - Third registrant from same facility discount – 10%

A \$5 credit card processing fee shall be added to all of the above.

CALCULATING PROJECTED PROGRAM REGISTRANT INCOME:

Early Bird Member Rate x Minimum Number of Members Expected = \$ _____

CALCULATING PROJECTED PROGRAM REGISTRANT PROFIT:

Projected Income – Projected Expense = \$ _____

PRICING EXHIBITOR BOOTH RENTAL:

Use the best “guestimate” of what the market will bear. Whenever possible, benchmark against other similar organizations and associations in Arizona.

CALCULATING PROJECTED INCOME:

Number of spaces sold at previous like meeting x rental fee = \$ _____

CALCULATING PROJECTED EXPENSES:

- Solicitation (brochures, printing, postage) \$ _____
- Venue rental fees (number of booths x actual cost of booth) \$ _____
- Exhibitor meal costs (2 per exhibitor) \$ _____
- Total Exhibitor Expenses \$ _____

CALCULATING PROJECTED EXHIBITOR PROFIT:

Projected Income – Projected Expense = \$ _____

Program Planning and Executing Timeline

Weeks in Advance	Tasks	Person(s) Responsible
20+	Assign a Planning Chair	First Vice President
20+	Recruit and confirm speakers	First Vice President and Planning Chair
20+	Confirm venue (through RFP process if necessary)	First Vice President, Planning Chair and Executive Director
20+	Develop program budget and establish registration fees	First Vice President and Executive Director
16	Appoint Planning Committee members	Planning Chair
16	Determine the schedule of events	Planning Chair and Committee
15	Collect all information required for marketing program (speaker bios, learning objectives, course descriptions, etc.)	Planning Chair, Committee and Executive Director
12	Issue invitations to potential exhibitors (if applicable)	First Vice President and Executive Director
12	Set up online registration and electronic registration confirmation system for exhibitors (if applicable)	Executive Director
10	Assemble information for mailed brochure and prepare for production and mailing	Executive Director, Planning Chair and Committee
9	Set up online registration form and any program marketing information on website	Executive Director
8-1	Prepare and issue periodic electronic messages for program marketing	Planning Chair and Executive Director
8-1	Acquire and assemble all materials required for program	Executive Director and Staff
6	Ascertain all AV needs and make necessary arrangements with either venue or contracted company	Staff
6	Announce to all speakers the deadline and specifications for submission of handout materials	Planning Chair
2-1	Detail all meeting needs and arrangements with venue staff (meals, room assignments, exhibitor assignments, etc.)	Executive Director
1	Post handouts to website and announce to registrants their availability and access	Executive Director
Post Program	Debrief on program	First Vice President, Planning Chair, Committee Members and Staff
Post Program	Review projected budget against actual numbers	First Vice President and Executive Director
Post Program	Compose and issue thank-you notes	First Vice President
Post Program	Write articles on program for publications	First Vice President
Post Program	Complete all registration, accounting and follow-up tasks	Staff

Note: These guidelines may be overridden by Executive Committee or Executive Board action.

*Adopted December 2000
Revised April 2010*

