

## Conference/Event Planning Checklist

**Name of Conference/Event:** \_\_\_\_\_

**Location:** \_\_\_\_\_

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

**1. Hosting Organization Information:** Most organizations will have a single point of contact similar to the NAVCRUITCOM Action Officer. A solid line of communication should be established to better facilitate the coordination of the more complicated evolutions of some events. Keep in mind that the liaison for the organization has their company's best interests at heart just as the Navy Action Officer or POC is seeking to get the most out of his/her negotiations. Professional but aggressive negotiations will ensure the Navy receives the highest return on investment for its sponsorship, but care must be given to the continued relationship following the event.

Primary Point of Contact: \_\_\_\_\_

a. Title/Position: \_\_\_\_\_

b. Phone Number: \_\_\_\_\_

c. Email: \_\_\_\_\_

d. Address: (*City, State: and Zip*) \_\_\_\_\_

Secondary Point of Contact: \_\_\_\_\_

a. Title/Position: \_\_\_\_\_

b. Phone Number: \_\_\_\_\_

c. Email: \_\_\_\_\_

d. Address: (*City, State: and Zip*) \_\_\_\_\_

**2. Sponsorship:** Many diversity organizations offer tailored sponsorships to various companies based on several factors. NAVCRUITCOM's participation/sponsorship level will be the standard by which your negotiations will be based. Consequently, it is not always a valid argument to accuse organizations of questionable ethics if differences in benefits and entitlements, between the Navy and other sponsoring companies, are discovered. More often than not, the Navy receives more benefits than most as a result of the continued and dependable support NAVCRUITCOM has historically provided. Some diversity organizations will provide a printed flyer outlining the benefits each offered sponsorship level provides. Regardless of expectations and verbal communications, the estimate of service and various tangible communications are the basis for any funding justifications and expectations. It's at this point that the Action Officer should focus on obtaining as much as possible for the level of sponsorship that has been directed, (i.e. larger booth size, free space for an additional display like the simulator or additional speaking venues and opportunities, etc). Additionally, the earlier the negotiations start the better. Most organizations are seeking early commitments from companies but most don't commit until the event draws nearer. Consequently many organizations will be more flexible with assets/benefits for those willing to commit early.

Sponsorship Level, (*i.e. Silver, Gold, Platinum*): \_\_\_\_\_

Sponsorship Amount: \_\_\_\_\_

Additional Sponsorship Event(s)/Opportunities: \_\_\_\_\_

Additional Sponsorship Amount: \_\_\_\_\_

Sponsorship POC Name: \_\_\_\_\_

**Conference/Event Planning Checklist Continued**

Sponsorship POC Number: \_\_\_\_\_

Sponsorship POC Email: \_\_\_\_\_

Sponsorship Level Benefits: \_\_\_\_\_

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

e. \_\_\_\_\_

f. \_\_\_\_\_

g. \_\_\_\_\_

h. \_\_\_\_\_

i. \_\_\_\_\_

Individuals receiving **full registration** benefits through NAVCRUITCOM sponsorship. (Note: Must be approved by N3D/NRD OPS for local events)

Name	Rank	Command	Email	Contact Number

### Conference/Event Planning Checklist Continued

Individuals receiving **partial/career fair registration** benefits through NAVCRUITCOM sponsorship. (Note: Must be approved by N3D/NRD OPS for local events)

Name	Rank	Command	Email	Contact Number

**3. Funding Information:** Typically this justification can be found with the printed and itemized invoice estimate provided by the organization, by the organizations flyer outlining the various sponsorship levels, and in some cases a "sole source" document. Itemization of estimates along with actual "break outs" of where dollar amounts will be applied within the organization is necessary to ensure NAVCRUITCOM is not in violation of any UCMJ article or other restrictions. N3D can provide more information regarding required documentation and timelines. Diversity Action Officer negotiations should include some explanation of fiscal limitations to diversity organization liaisons. Depending on the level of sponsorship and the amount of money obligated by NAVCRUITCOM N2D, and the time at which the various events take place with respect to the fiscal year, some organizations may not receive their funding until several weeks following the event.

- Sole Source Letter Signed and Submitted       Yes     No      Date:
  
- Received Quote/Estimate of Service Signed and Submitted?       Yes     No
  
- OOC Approval for Commitment:      Date:      Amount:

Signature: \_\_\_\_\_

### Conference/Event Planning Checklist Continued

**4. Conference/Event Highlights and Uniform Information:** Conference uniforms will always be per Uniform Regulations for the area in which the conference is taking place. The Action Officer is responsible for determining the appropriate uniforms for the events taking place at the conference for final approval by N3D. At no time, are "Khaki/Navy Polo Shirts/NWU" authorized unless specifically directed. There is no substitute for good judgment and professionalism. When in doubt, wear the uniform of the day! Formal events require "Dinner Dress" uniforms. Typically NAVCRUITCOM will make the final decisions regarding relatively minor accoutrement issues like the use of mini versus large medals, or gloves versus no glove; however, keep in mind that the senior ranking Navy attendee or guest has the final word on accoutrement issues. The key issue to remember is that you are representing Navy Recruiting Command and the Navy in a professional and high-visibility forum. Weathered uniforms and faded or dirty accoutrements are unacceptable.

Date	Times	Event	Location	Key Personnel	Uniform

**5. Exhibit Information:** NAVCRUITCOM contracts its current advertising agency to manage its advertising. The current agency sub-contracts "Skyline" to provide all the major displays at national and many regional events. The assets at their disposal include the "Simulator", the "National Expo Booth", and the Navy's IMMERSA-DOME. These assets can be requested no earlier than six months with requests made through each respective District. Scheduling requests and conflicts are resolved through N9 and it should be noted that most assets are assigned on a "first come, first serve basis". Assets for national diversity events are typically reserved by N9, for N3D, but usually only include the "National Booth."

- Exhibit Type:
- a. National Expo Booth:
  - b. Local NAVCRUITDIST:
  - c. Headquarters Exhibit:
  - d. Simulator 1 (12 pax):
  - e. Simulator 2 (12 pax):
  - f. IMERSA-DOME:

## Conference/Event Planning Checklist Continued

Exhibit Booth Reserved?     Yes     No    Date: \_\_\_\_\_

Organizational Exhibit Booth Contact:

a. Name: \_\_\_\_\_

b. Phone: \_\_\_\_\_

c. Email: \_\_\_\_\_

Contractor Exhibit Booth Contact:

a. Name: \_\_\_\_\_

b. Phone: \_\_\_\_\_

c. Email: \_\_\_\_\_

d. Funding: \_\_\_\_\_

Booth Cost: \_\_\_\_\_

Services Cost: \_\_\_\_\_

Booth Number \_\_\_\_\_

Booth Size (i.e. 20x20, etc.): \_\_\_\_\_

Confirmation Number: \_\_\_\_\_

**6. NAVCRUITDIST Participation:** A primary mission of NAVCRUITCOM Diversity (00) is to coordinate and establish communication between diversity organizations and local NAVCRUITDISTs. District participation is paramount. The briefings, workshops, career fair booth manning, and events of interaction are the responsibility of the local NAVCRUITDIST. Regardless of the nature of the audience, whether or not the pool of candidates is from the local area, or from across the nation, local NAVCRUITDIST representatives must remain immersed in the conference throughout its duration. While the majority of the events and organizations that NAVCRUITCOM sponsors are higher education and engineering oriented, local R-OPS should be equally engaged. It's imperative that NAVCRUITCOM personnel are kept informed throughout the planning phase of each event. Regular updates to this checklist followed by its forwarding to Diversity (N3D) personnel will drastically minimize miscommunication. In addition to R-OPS, District COs and XOs should also be included in any updates. CO and/or XO participation at the career fair, formal banquets and events with Navy flag officer participation is expected. The day or week of the event is not the best time to discover that Navy personnel were unaware of uniform requirements, manning requirements, etc. Providing regular updates and detailed requirements to Diversity (N3D) and any other participants will minimize, even eliminate any potential embarrassments to NAVCRUITCOM or the Navy.

Primary Point of Contact:

a. Name: \_\_\_\_\_

b. Phone: \_\_\_\_\_

c. Email: \_\_\_\_\_

**Conference/Event Planning Checklist Continued**

CO/XO Notified?       Yes     No

a. NAVCRUITDIST CO: \_\_\_\_\_

b. NAVCRUITDIST XO: \_\_\_\_\_

Local Recruiters Notified (if event not located in the District City)?     Yes     No

Local Recruiter Contact:

a. Name: \_\_\_\_\_

b. Phone: \_\_\_\_\_

c. Email: \_\_\_\_\_

Requested Support:

a. Dates for Requested Support: \_\_\_\_\_

b. Description of Support: \_\_\_\_\_

c. Recruiters Requested:     Yes     No

d. Details of Supporting Personnel:

Name	Dates of Support	Time	Cell Number

**7. Recruiting Aid Devices (RADs):** RADs must be ordered no later than 40 days prior to the event when practical. RADs orders should be tailored to address the target audience. Bilingual and/or engineering RADs specifically target some of the audiences the Navy is currently seeking to attract. Ensure your order takes into account the demographics of the audience and the current demands of the Navy. Because of the seasonal nature in which the RADs supply and demand quantities are available, occasionally, certain “trifolds”, and RADs will not be available. Most events will require at least two RADs orders, a “bag stuffing” order and a “career fair” order. Most of the organizations NAVCRUITCOM sponsors have a “bag stuffing” deadline at which time they will place items in the bags they hand out to all conference attendees. These opportunities should be taken advantage of to ensure a complete dissemination of appropriate Navy RADs. Typically these orders are sent directly to the organization. The second order sent directly to the closest NAVCRUITSTA to the event, or the NAVCRUITSTA of the supporting District personnel's preference will be for the “giveaways” and handout at the career fair. The NAVCRUITDIST is responsible for ensuring all sent RADs are at the appropriate event(s). The NAVCRUITCOM Diversity Action Officer is responsible for ensuring the organization and various locations are prepared to receive the sometimes sizable RADs orders. Previous events have presented challenges with regards to union labor laws and the transporting of boxes into the career fair. Action Officers should be prepared to deal with any complication regarding the movement of RADs in and out of an event.

**Conference/Event Planning Checklist Continued**

- Expected Attendance: \_\_\_\_\_
- Race/Ethnic Group Emphasis: \_\_\_\_\_
- Market Emphasis:
  - General
  - Officer
  - Enlisted
  - Engineering
  - Aviation
  - Nuclear
  - College/Gollege Graduate
  - High School/High School Graduate
  - Influencer
  - BDCP

**First RADs Order**

- Date of Order Request: \_\_\_\_\_
- Date Order Placed: \_\_\_\_\_
- Purpose (i.e. bag stuffing, pre-college event, booth, etc.) \_\_\_\_\_
- Forwarding Address for Shipment:

Contact: \_\_\_\_\_

Phone Number: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

- Date RADs Shipped: \_\_\_\_\_
- Shipping Carrier: \_\_\_\_\_
- Tracking Number: \_\_\_\_\_

## Conference/Event Planning Checklist Continued

Date RADs Received: \_\_\_\_\_

Person who Received/Signed for RADs: \_\_\_\_\_

### Second RADs Order

Date of Order Request: \_\_\_\_\_

Date Order Placed: \_\_\_\_\_

Purpose (i.e. bag stuffing, pre-college event, booth, etc.) \_\_\_\_\_

Forwarding Address for Shipment:

Contact: \_\_\_\_\_

Phone Number: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date RADs Shipped: \_\_\_\_\_

Shipping Carrier: \_\_\_\_\_

Tracking Number: \_\_\_\_\_

Date RADs Received: \_\_\_\_\_

Person who Received/Signed for RADs: \_\_\_\_\_

**8. Defense Media Activity:** Diversity is a priority for the CNO. The Defense Media Activity (DMA) is interested in providing on-site video coverage of national diversity events, especially if Navy has an award winner. If DMA attends, always notify any attending flag staff personnel. To request DMA coverage, notify the DMA Assignment Desk at (202)433-0300. The NAVCRUITDIST PAO is expected to attend events as well as having the lead in coordinating all media coverage. Every effort should be made by the NAVCRUITDIST PAO to coordinate external media; pre/post event press releases; media kits, etc. Always keep them informed by ensuring they are included in email updates. At the end of each conference, PAO is expected to forward photo CD to Diversity (N3D).

**9. Workshops and/or Guest Speaker Opportunity:** Yes No  
Most of the organizations NAVCRUITCOM sponsors include one, if not several workshops with the sponsorship. The District Action Officer is responsible for securing, negotiating, and assigning appropriate workshop presenters/speakers, and ensuring the logistics involved with the workshop are coordinated. NAVCRUITDIST personnel or Region personnel are the appropriate presenters for these events. While venues, audiences, and subject matter may dictate other requirements, the ideal situation is to provide local recruiting personnel with an opportunity to establish a link with local prospects. Care in the selection and assignment of presenters cannot be emphasized enough. An untested presenter or speaker should come with a reputable recommendation if the event is of significance. Workshops, while typically attended by smaller numbers when compared to competing companies, should be treated as if Flag attendance is expected. Most workshops include a speaking window from 20-60 minutes in length. Speakers must take advantage of every minute and not rely on a "winging it" attitude towards their audience.



**Conference/Event Planning Checklist Continued**

Topic: \_\_\_\_\_

Name of Briefer: \_\_\_\_\_ Command: \_\_\_\_\_ Phone \_\_\_\_\_ Email: \_\_\_\_\_

Travel Funded by NAVCRUITDIST:  Yes  No

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

Hotel Confirmation Number: \_\_\_\_\_

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

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

Audio/Viaual Equipment Needed: \_\_\_\_\_

Workshop Coordinator Notified of Briefer/Topic: \_\_\_\_\_

Workshop Location: \_\_\_\_\_

Workshop Time: \_\_\_\_\_

**Additional Workshop:**  Yes  No

Topic: \_\_\_\_\_

Name of Briefer: \_\_\_\_\_ Command: \_\_\_\_\_ Phone \_\_\_\_\_ Email: \_\_\_\_\_

Travel Funded by NAVCRUITDIST:  Yes  No

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

Hotel Confirmation Number: \_\_\_\_\_

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

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

Audio/Viaual Equipment Needed: \_\_\_\_\_

Workshop Coordinator Notified of Briefer/Topic: \_\_\_\_\_

Workshop Location: \_\_\_\_\_

Workshop Time: \_\_\_\_\_

## Conference/Event Planning Checklist Continued

**10. Flag Attendance/Participation:** The majority of the events that NAVCRUITCOM sponsors will have some level of flag participation. The Diversity Action Officer will assume the role of a "Flag Lieutenant" or "Flag-Aide" unless otherwise directed by 00C. Typically CNP Diversity in Washington D.C. will coordinate the assignment of flag officers to attend specific events. Occasionally, some flag officers attend out of genuine interest or affiliation with an organization. Regardless of their motivation, Action Officers should be in regular communication with NAVCRUITCOM Diversity (N3D) personnel as well as the attending flag's staff to ensure every facet and detail of the flag's participation is scheduled and accounted for. Never assume the flag's staff will be taking care of lodging, travel to and from an event, or "in and about" travel once at the event location. As the Action Officer, expect to be the "go to" person and have as many answers, or answer resources, available ahead of time. Professionalism and over-preparation cannot be emphasized to strongly. Communication between flag officers is excellent; therefore, expect every detail of an event to be communicated by attending flags back to the NAVCRUITCOM decision makers.

**11. Lodging Arrangements:** Hotel accommodations should be secured as early as possible. Most events fill the host hotel quickly which can logistically complicate Action Officers responsibilities if forced to stay at an outlying hotel. Most hosting hotels will require a personal credit card to secure any room reservations. Occasionally this obligation includes a pre-payment of a one night stay. N4 must be notified of any charges to a Government Credit Card (GOVCC) that will not be paid within the normal 30 day window using the members Government Travel Card. Additionally, Diversity Action Officers may be tasked with securing a "room block" for all NAVCRUITCOM sponsored attendees. Authorization from N3D and N4 must be secured before any fiscal obligations are made. Typically, an accurate "head count" of attendees is difficult to obtain several months prior to an event. Experience coupled with common sense will dictate the number of rooms that should be reserved. Higher visibility events, events at which a flag presenter will be in attendance, or if there is a Navy award winner, will undoubtedly require additional rooms. Constant communication between conference coordinators, hotel personnel, and diversity organization personnel will be required to ensure the Action Officer is not financially responsible for missed room reservation deadlines and cancellation dates.

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

Rooms Blocked: \_\_\_\_\_ Date Rooms Reserved: \_\_\_\_\_

**12. DTS Reservations:**

Yes  No Date: \_\_\_\_\_

Reservations in Defense Travel System, (DTS) should be made no later than 10 days prior to an event. Ideally Action Officers should make DTS reservations as soon as practicable; however, budget constraints and obligations will determine at what time reservations can be made. Typically only flight reservations are made in DTS. Most conferences take place at hotels that SATO will not be able to make reservations under a conference hotel room block. It's to the advantage of the Action Officer to make hotel room reservations separately from DTS and then enter the appropriate data into the DTS travel request. N4 is an excellent source of information regarding the appropriate claims, charges and procedures for ensuring complete travel claims and payments.

SATO Confirmation Email Received?  Yes  No Date: \_\_\_\_\_

SATO Reservation Email Received?  Yes  No Date: \_\_\_\_\_

Flight Dates/Time: To: \_\_\_\_\_ Return: \_\_\_\_\_

Flight Numbers: To: \_\_\_\_\_ Return: \_\_\_\_\_

Air Carrier: To: \_\_\_\_\_ Return: \_\_\_\_\_

## Conference/Event Planning Checklist Continued

**13. Pre-Conference/Event Final Checklists:** To ensure the Action officer has every available resource on site, the below items should be accounted for prior to departing the NAVCRUITDIST. Adjusting travel arrangements and accommodations while on the road is exponentially more difficult.

- a. NAVCRUITCOM Schedule of Events Complete
- b. Conference/Event Outline Complete
- c. Orders Ready for Pick-Up
- d. Lodging Secured
- e. Conference Binder Complete
- f. Briefings Prepared/Complete
- g. Business Reply Cards (BRCs) Ready
- h. Digital Camera
- i. Uniform Determination/Promulgation
- j. Media Coverage

**14. Submit After-Action Report within five working days of conference/event completion**

Date Submitted

After Action Reports are submitted via the normal Chain of Command to arrive at NAVCRUITCOM Diversity (00C) no later than five working days following the Action Officers return. Standard Navy format is required and presented with an executive summary approach for content. Content requirements will vary from supervisor to supervisor; but, the fundamental requirements of professionalism and tact remain constant. In some instances the information the Action Officer places in the After Action Report is included in the Admiral's weekly report. Often copied directly from the report itself, Action Officers should write their reports as if they are addressing senior leadership directly. Lengthy reports that require the reader to dig the highlights out are not recommended as are not the brief reports that do not address the important highlights of an event.

**15. DTS Travel Claim within five working days of conference/event completion:**

Yes     No    Date:

**16. File this Checklist and Associated Documents:**

Yes     No    Date: