
WAFWA WORKSHOP PLANNING HANDBOOK

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WAFWA Points-of-Contact

Below is a quick reference for the points-of-contact at WAFWA for various stages of the workshop planning process.

Preliminary Planning: Cortney.Mycroft@wafwa.org

Budgeting: Send to Cortney.Mycroft@wafwa.org

Credit Card: Send to Cathy.Campbell@wafwa.org

Contracts: Send to Cortney.Mycroft@wafwa.org & Cathy.Campbell@wafwa.org

Receipts (saved as .pdf, labeled, and workshop identified): Send to WAFWA.Admin@wafwa.org

Website: Send to Cortney.Mycroft@wafwa.org

Attendee & Sponsor registration details: Send to Cortney.Mycroft@wafwa.org

Final Budget Reporting: Send to Cortney.Mycroft@wafwa.org

Reimbursements: Send to Cathy.Campbell@wafwa.org

Purpose of WAFWA Workshops

The Western Association of Fish and Wildlife Agencies (WAFWA) began sanctioning workshops in the mid-1970s. There currently are 12 sanctioned workshops recognized by the Directors of WAFWA. These workshops are established to provide a forum for fish and wildlife professionals to interact with each other on new research, management, enforcement, and administrative practices, and to use this new information to promote better management of species or administration of member agencies. The Directors annually review the workshop schedule and hear from workshop host Committees about significant findings, accomplishments and concerns emanating from the workshops, including the policy ramifications of any recommended actions. Simply put, the Directors see the "sanctioning" process as an ongoing means to keep abreast of important issues. Once "sanctioned", these workshops are authorized to use the name of the Western Association of Fish and Wildlife Agencies on printed materials related to the workshop, and hosts are encouraged to acknowledge the Association's participation. This participation, however, does not extend to financial assistance.

The Directors of the Western Association of Fish and Wildlife Agencies have established application and approval procedures, as well as operating guidelines and reporting requirements for sanctioned workshops. These procedures and guidelines are designed to provide for timely review and action on the Directors' part, and the applicant the opportunity to learn what it takes to host a successful workshop and understand the feedback mechanisms that are required to the Association.

WAFWA Sanctioned Workshops

Directors currently sanction 12 technical workshops. Each workshop is housed within one of WAFWA's Committees. Following is a listing of sanctioned workshops, their frequency, and the committee to whom the workshop reports:

Workshop	Frequency	Host Committee
Conservation Business Managers Conference	Annually	Conservation Business Managers Committee
Desert Bighorn Council Workshop	Biennially	Wild Sheep Initiative
Human/Wildlife Conflicts Workshop	No Regular Schedule	Wildlife Chiefs Committee
Mountain Lion Workshop	Every 3 Years	Wildlife Chiefs Committee
National Quail Symposium	Every 5 Years	Sage & Columbian Sharp-tailed Grouse Technical Committee
Northern Wild Sheep & Goat Symposium	Biennially	Wild Sheep Initiative
Pronghorn Workshop	Biennially	Wildlife Chiefs Committee
R3 Symposium	Annually	R3 Committee
Sage & Columbian Sharp-tailed Grouse Workshop	Biennially	Sage & Columbian Sharp-tailed Grouse Technical Committee
Western Black Bear Workshop	Every 3 Years	Wildlife Chiefs Committee
Western States/Provinces Deer & Elk Workshop	Biennially	Mule Deer Working Group Technical Committee
Western States Wild Turkey Workshop	Annually	Wildlife Chiefs Committee

Preliminary Planning

Previous Events

If your workshop is recurring, check with the previous hosts to find out if they have any notes that they'd care to pass along. Were the meeting rooms large enough? What would you change if you could? How many support staff did you have on hand to help run the program? Was there a call for posters and/or presentations? These are all questions you may want to consider asking. WAFWA maintains contracts from previous events, and often those contracts contain room sizes, the way the rooms are set up (classroom versus U-shaped, for example), and the number of people the room was set to seat. WAFWA will also provide information related to the number of people who registered for the most recent meeting, sponsor money raised, and the information provided on the previous workshop's webpage. If funds from the previous workshop are not enough to cover down payments, the workshop coordinator will be required to secure sponsorship funds before contracts can be signed. Current workshop coordinators are welcome to stand on the shoulders of those who previously coordinated.

Projecting Attendance

If you are unfamiliar with your group's previous attendance, reach out to Cortney. She can look it up. Other factors that might impact your attendance: other workshops or events competing for the same audience, registration/lodging costs, field season or other seasonal events, travel restrictions, or change in administration (if event falls on an election year) that may take away from participation in your event. Also consider what may have impacted participation in previous events to try and avoid those.

Location

When considering where within your state/province to host the event, take into consideration proximity to an airport, shuttle/taxi/uber availability to transport from airport to hotel, hotel proximity to venue (if different), the availability of restaurants near the hotel if attendees will be "on their own" for any of the meals, seasonal conditions that may impact walking to nearby facilities. Rain, snow, heat, cold, hills, traffic are all factors to consider. Costs associated with flying into a small, regional airport or renting a car should be considered when selecting a far-flung location. Sometimes far-flung is what you may need if you are targeting a location based on a fish/wildlife population or resource. It is important to understand that choosing a location that requires extra expense may limit your ability to get as many attendees participating when compared to workshops in cities with hub airports and hotel shuttles. You may have to adjust your estimated attendee numbers to account for a lower participation rate.

Timing

Often, our workshops tend to occur at a similar time in the year. These times are selected based on other commitments typical attendees have (field season, other workshops). While the workshop you are planning may flex the time a bit earlier or later based on availability of your venue, consider that your participation may change based on what other conflicts your potential attendees may have. Before proceeding, call around to the facilities that are in the area you are considering and make sure they have available space for your group during your preferred time. If not, you'll need to review either the location or consider moving the meeting forward or backward on the calendar. Check with WAFWA staff before moving the timing to ensure that you're not overlapping with another event that may cause your attendees to choose one or the

other. WAFWA strongly recommends ending workshops at noon, local time, to allow for participants to travel home in the same day. WAFWA also strongly recommends avoiding weekend for meeting and travel days.

Staffing

Consider asking for help within your agency to manage the many moving parts of a workshop. Some tasks to consider distributing among a couple colleagues include: attending planning meetings, coordinating vendors/meals, field trips, identifying sponsors/exhibitors, calls for and selection of papers/workshop program agenda items, producing and editing proceedings (if applicable).

Budgeting

The first big step in the workshop planning process is setting up sideboards for your expectations of the event. This can be challenging when you don't have all the pieces in place, but it is good to start with this step after reviewing the previous meeting materials and information, choosing the location of the event, and identifying the window of time (weeks) within which you'd like to host the event. WAFWA can provide you with the budget and/or actual expenses of your previous workshop(s) to help with planning purposes.

Most recurring workshops carry a balance in their WAFWA account from the previous meeting. WAFWA can provide the bank balance of your workshop account (if applicable). Depending on the periodicity of your event, some of the available funds may have been budgeted to remain earmarked for deposits for a future event and cannot be used for yours. The expectation and purpose of this money is for it to be available to pay deposits when needed. The balance must be replenished by the end of the workshop to help pay deposits for the next one.

Planning Income

Workshop income typically comes from registrations and sponsorships. Do note, WAFWA charges \$30 for every registrant, to cover expenses that include credit card fees, support software fees, and administrative support. Base your budget on no more than 80% of your realistic, projected attendance. *Do not include the bank balance as income. Your workshop should be earning enough to end with 5-10% more in the bank than when you began.*

Registration dollars tend to make up the bulk of our workshop income, but they typically are calculated to cover the costs of attendee food and beverage costs and administrative fees (\$30/attendee and \$30/sponsor to cover registration hosting, bookkeeping, and tending to refunds or registration changes), with a little leftover to help pay for student or reduced priced and comped attendee fees.

Sponsorships are what make the events above and beyond. Contributions from our sponsors typically help pay for the facility, field trips, program printing, snacks, swag, and other items. When enough sponsor dollars are obtained, this allows for a reduced registration rate for attendees. The availability of sponsors and the amount they are willing to pay varies from event to event and from year to year. While we do have some national sponsors that typically provide money for our workshops, local sponsors can really elevate the event. See the [Sponsorship Section](#) for more information.

Planning Expenses

Typical workshop expenses include meeting & facility rental, food & beverage, audio/visual support, nametags, and attendee gifts. Other expenses to consider include paid presenters, awards, vendor table setup, program/signs printing, and expenses related to field trips (venue rental, transportation, etc.).

Use this [Workshop Budget Template.xlsx](#). Download a copy to begin editing. Note there are three tabs in this workbook. Most of the “Summary Sheet” tab will auto-calculate using data from the next two tabs. The “Income Calculations” tab will help estimate registration and sponsorship details, and the “Expense Calculations” tab helps break out direct expenses. You will use this template to build out your projected budget. Once the event is over, you’ll save a copy of your budget and enter in your actual expenses, registration rates, and numbers of attendees and submit that actual budget file in your final report to WAFWA. You will need to build in a back-up plan to reduce expenses if registrations and sponsorships fall short of expectations. Perhaps consider not printing programs, removing attendee gifts, or removing a meal for cost reduction.

It is essential that you keep track of your expenses and receipts and monitor your budget based on sponsorship and attendee registrations. Your sponsorships and attendee registration reports are available upon request from WAFWA staff. You will be required to report all expenses in the reporting period after the workshop, if not before.

A credit card is available upon request. Contact Cortney to start that process. Please note this process can take at least 15 days, so start this process prior to accruing expenses. All charges to the credit card require documentation with receipts saved as a PDF with transaction date and store name in the file name. Send those to wafwa.admin@wafwa.org with the workshop name in the email subject line.

Contracts and Vendor Forms

All contracts (hotel, speakers, caterers, etc.) associated with a WAFWA workshop must be reviewed by Cathy and Cortney and signed by WAFWA’s Executive Director, Zach Lowe. The workshop coordinator can be listed as the point of contact for the event.

If WAFWA must make payment on a contract or invoiced services, we must have the two files below completed for that vendor.

[WAFWA Vendor Application Fillable.pdf](#)

[WAFWA Intuit Vendor DD form-Fillable.pdf](#)

If your event will be held in Canada or requires reimbursement to Canadian residents, please reach out to Cortney for the appropriate forms.

Workshop Coordination Options

Some of our workshops have a large enough attendance and/or sponsor funds to hire an event planner to work through some of the logistics. WAFWA works exclusively with Delaney for this service. This service typically costs the workshop \$15K-\$20K. After your general budget is reviewed, WAFWA will determine whether Delaney’s services are appropriate for your workshop. See table below to better understand the support provided by WAFWA or Delaney and host agency responsibilities.

Regardless of who is coordinating the workshop, the host agency works with WAFWA to decide the location (city) of event, target month, and reviews last workshop budget, balance, and attendance. The host agency would start calling venues to seek out availability and rates.

The agency will then develop a budget using projected attendance and find a target rate for rooms, food and beverage, and would also identify key sponsors to project that level of support.

Once the agency has worked with WAFWA and within their own agency to accomplish these steps, the question is asked: Do we have enough money and attendance interest to hire out the event coordination that Delaney offers? If so, WAFWA would put you in contact with Delaney Events to progress through the table below. If this is not in the budget, WAFWA and the host agency work through the table below to plan the workshop.

Event Planning Steps

The following table explains each planning step and who is responsible for that task: column two shows if the workshop is agency coordinated, and column three shows if the workshop has hired Delaney Events to coordinate, and column four shows the approximate timing at which these steps should happen. Dollar signs in the Agency column signify optional, added expense items. Dollar signs in the Delaney column signify an add-on option to their event planning services.

Event Planning steps	Agency Coordinated	Delaney Coordinated	Approximate Timing
Preliminary Location (city with suggested venues) and Date (target month/week) Workshop Setup Form.xlsx Download, fill out, and email back to WAFWA	Agency	Agency	18 months
Work with WAFWA to review previous year's event costs, attendance, sponsorships, and registration fees	Agency & WAFWA	Agency & WAFWA	18-24 months prior
Identify potential venues and rates based on availability to host the event	Agency	Agency	
Work with WAFWA to establish a preliminary budget using this template: Workshop Budget Template.xlsx	Agency & WAFWA	Agency & WAFWA	
On-site visit if applicable (workshop pays for event coordinator's time plus travel expenses)	Agency	\$\$ or Agency	
Event logo design (alternatively use WAFWA produced logo)	\$\$	\$\$	
Develop sponsor levels, design brochure, and open Sponsor registration	Agency & WAFWA	Delaney	
Contact sponsors	Agency	Delaney & Agency	
Sign agreed-upon hotel contract including any food/beverage service and set up room blocks – all contracts must be approved and signed by WAFWA Executive Director	WAFWA	WAFWA	12-18 months prior
Develop and maintain budget	Agency & WAFWA	Delaney & WAFWA	
Presentations and Call for Abstracts (if applicable)	Agency	\$\$ or Agency	
Establishment of Registration Levels (early bird, standard, student) and timing	Agency & WAFWA	Delaney	4-6 months

Event Planning steps	Agency Coordinated	Delaney Coordinated	Approximate Timing
Post the workshop webpage on wafwa.org/events that includes Agenda, Lodging, Registration, Sponsorships, etc.	WAFWA	WAFWA	
Save the date to past workshop attendees, WAFWA distribution list, The Wildlife Society newsletter, species-specific organization websites.	Agency	\$\$ or Agency	
Open Attendee registration	WAFWA	Delaney	3-4 months
Notified selected presentations (if applicable)	Agency	Agency	
Advertise open registration workshop using past workshop attendees, WAFWA distribution list, The Wildlife Society newsletter, species-specific organization websites.	Agency	Delaney	
Based on sponsors and attendee count, communicate with venue about meeting room needs, food and beverage selection, and audio/visual prior to meeting	Agency	Delaney	1-2 months
Program design (online/pdf version vs printed)	\$\$	\$\$	
On-Site Management – working with hotel/facility, meeting room setups, food & beverage point of contact (workshop pays for event coordinator’s time plus travel expenses)	Agency	Delaney	During
On-Site Registration – setup, greeting, distribute nametags, processing “walk-in” registrations (if applicable). (workshop pays for event coordinator’s time plus travel expenses)	Agency	Delaney	
Submit final report to WAFWA (including the budget sheet with actual income and expenses reflected)	Agency	Delaney & Agency	up to 1 month post
Produce proceedings (if applicable)	Agency	Agency	

Venue

Selecting a venue requires considering several factors:

1. General location: Is this place relatively easy and affordable to get to for your target audience?
2. Venue location: What is the distance and accessibility to airport and ground transportation?
3. Size: Are the meeting facilities large enough to accommodate your group and satisfy your group’s needs. Is there room for 15-20% of your projected attendance if you get an extraordinary turnout?
4. Rooms: Are there enough rooms available for all meeting attendees? Is there a back-up hotel nearby if yours is full and you need more rooms? Will the back-up hotel be more attractive (location/price) than the main hotel and compromise your room commitment?
5. Field trip options (if season and budget allow): Are they easy to get to from your venue? Can buses park to wait for attendees to board?

Do note: WAFWA’s Executive Director, Zach Lowe, must sign all contracts for which WAFWA is responsible. State/Provincial staff should not sign on behalf of WAFWA. Send contract items to Cortney and Cathy.

Considerations when selecting a hotel:

1. **Do they allow for a room block without a room reservation minimum?** Many hotels will reserve rooms for a group to advertise and then release any unclaimed rooms 30 (or so) days before the

event to open them up for the general public. This removes the minimum room nights requirement that hotels often include by default. A minimum room-days requirement will take the total number of rooms per night (or in total) and charge WAFWA for rooms that were not reserved by the group, resulting in an attrition fee. This is a fee for not reaching the required minimum rooms night agreed upon in the contract. It is important to not overestimate the number of traveling attendees. We prefer you secure a room block without the financial liability of a minimum room requirement.

2. **Do they offer per diem rates?** You can request that the attendees be charged the local per diem rate (see this website to find your event's <https://www.gsa.gov/travel/plan-book/per-diem-rates>) for their room. Of course, you are asking for the hotel to give up some of its profit, but if your event will be using the hotel's food and beverage service and/or paying for meeting rooms, you may be able to talk them into offering per diem rate for at least some of your rooms – or for an early-bird rate on your room block (see #1 above).
3. **What is the minimum food and beverage fee and is it reasonable for the size and length of your event?** Keep in mind the taxes and percentage fees the venue charges. This can be an additional 10k in taxes/fees.

Sponsorship

Most of our workshops have sponsors who send money in return for promotion on the website, program, or acknowledgement of some sort. In addition to sponsorships, many workshops have some type of exhibitor setup where sponsors can pay extra to have booth space to interact with workshop attendees. If you plan to include an exhibitor option for your event, be sure to have time carved out during a social period or refreshment break to allow for exhibitors to have facetime with attendees. Depending on your workshop setup, you can also offer sponsors the opportunity to sponsor a meal or social time. Be sure to allow some time for the sponsor to address the audience in return for their extra monetary contribution. Communicate your expectations clearly to sponsors so they know what they are being provided. Sponsors will pay using our registration platform where WAFWA will monitor progress.

Planning

You will need to create a standard “menu” from which a sponsor can choose the amount they wish to sponsor based on what they will get for their money. This will be presented to them via the website as a PDF. You can review recent workshop sponsor brochures [2024 Western Black Bear Workshop - Sponsor Brochure.docx](#) and [2024 Sagebrush and ST Grouse Workshop- Sponsor Brochure.docx](#) to get an idea of what other workshops are offering. Download and fill in your workshop's information and the sponsor values you would like to use. Make sure you include a large dollar option in your sponsor brochure. Some agencies are able to spend the money, but if the option is not included on the sponsor sheet, they cannot get approval.

Who do you approach?

WAFWA can provide the sponsor list of the last one or two iterations of your workshop to provide ideas (and contact information) for those who may be primed to sponsor your event. You may have other (often times local) ideas of groups or companies who are interested in sponsoring. Note WAFWA's [Sponsorship and Exhibition Policy and Guidelines](#). Note: Sponsorships are *not* tax deductible.

Considerations when budgeting

Be sure to note in your budget if a complimentary registration will be offered to sponsors or exhibitors and at what level. When budgeting, the income from a sponsor of \$1000 will be logged, but in expenses you'll need to have a "Vendor Comped Registrations" line that deducts the cost of the complementary registration from the overall income. The free registration should not drop the value of the sponsorship lower than the next tiered sponsor. Some of our workshops depend heavily on federal funding.

Workshop Presentations and Posters

Some workshops have a call for posters and presentations to provide content for their event. Often, this is administered by the host agency by providing an email address, a topic theme, and guidelines for submission. You will provide this information to go on the event's webpage. Provide a deadline for submission and an approximate date by which applicants will be notified of selection. Do consider that some people may not attend if their work is not selected. Successful applicants should be provided time to register without being in the "late registration" period after they are notified.

If you are providing a poster session, you will work with the venue or a local organization to borrow easels. You will need to work with your venue representative to arrange where the easels may be located for the session and where they can be stored. You will also need to arrange whether the venue will set them up or if your agency staff will set them up. Venue staff set up will likely come with an additional fee.

Attendee Registration

We typically offer three time periods for registration (early, standard, and late) with a moderate increase in price with each progressive step. When determining the timing of these periods, consider the timing of other deadlines that may determine a person's participation in the event (such as a selection for a [poster or presentation](#)). While setting your workshop rates, keep in mind that WAFWA charges \$30 per registrant for administrative fees, bank fees, and registration hosting. Registration questions will automatically include food allergies/preferences, but you could add selections such as boxed lunch options, session options, etc.

Here are the details WAFWA will need to know to set up your event on our registration platform:

- What date would you like registration to open?
- What will be the early bird, standard, and late rates for a regular registration? (Provide cutoff dates for each registration period.)
- Optional: Will you offer a student and/or retiree registration rate? (Provide rates for each registration period.)
- Optional: Will you offer the option for a One-Day Rate? (Provide which days will be available for a one-day ticket.)
- Optional: Will you charge separately for a field trip? (Provide cost.)
- Optional: Will there be an option to attend only a banquet dinner or other guest options? (Provide cost.)
- Optional: Will the event have a custom digital logo? (Provide in a .png or .jpeg format.)
- What date is the last date to register?

- What meals will be provided?
- Will there be a meal where the attendees need to preselect options? (Provide which meal and what are the options.)
- Will there be a field trip? (Provide details including where it will be, what you'll be doing, what day, amount of time, mode of transportation, apparel/weather considerations.)

WAFWA requires at least four weeks after receiving the requested information to set up the workshop online. WAFWA staff will send the appropriate people a registration test to ensure that everything has been completed as requested.

Workshop Closeout

Reporting Requirements

After the completion of the workshop, compile a written report with the following information to summarize the event:

- Meeting date and location: Venues used/visited
- Meeting coordination: Who was in charge – two points of contact
- Participation: Number of Attendees, states/provinces represented at meeting
- Accounting: budget (original vs actual), registration fees charged, vendor and sponsor income, all receipts for charges to workshop credit card (if applicable)
- Next meeting: Proposed date/location, contacts for those in host location(s), recommendations and suggestions for the next meeting
- Include: Workshop agenda and submit proceedings or workshop summary sent to attendees (when available)

This report is due 30 days after the end of your event and should be sent to Cortney, your workshop's host Committee Chair and Vice-Chair, and the contacts for the next meeting. If your workshop's associated committee meets at WAFWA's Summer Meeting, this workshop report is something that the chair will report out in the business meeting and should be listed as an agenda item for your committee meeting. Please include them on the email when you submit it to the WAFWA business office. If you have questions about this, please send it to wafwa.admin@wafwa.org.

If you require reimbursement, contact Cathy for the appropriate form. All receipts should be labeled with the type of expense within budget template and saved as a PDF and sent to wafwa.admin@wafwa.org after the workshop is completed.

Thank you for your effort in providing WAFWA member agencies with quality workshops!