MEETING PLANNING MANUAL

Third Edition
2014 Revisions

LAW LIBRARIANS OF NEW ENGLAND

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LAW LIBRARIANS OF NEW ENGLAND

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PREFACE

This manual is the product of our members' experiences in planning interesting and successful educational meetings for the Law Librarians of New England. We recognize that every situation is different, that meeting formats differ, and that meeting lengths vary. However, every host must deal with certain basics in planning a meeting or conference. These important elements include:

1. selecting interesting participants topics and participants

2. selecting an appropriate location

3. determining sequence and timing of programs and events

4. estimating costs and producing a budget

5. planning food and social activities

6. publicizing the meeting, and

7. handling all the other details that result in a successful event.

The procedures outlined in this manual summarize the planning steps that have evolved during past conferences and meetings. Suggestions and guidelines to implement the procedures follow each section, as appropriate. These additional planning suggestions are numbered to correspond to the procedures they supplement in the preceding chapter. Sample forms and letters are provided to assist meeting hosts.

This manual is intended only as a guide, not as a rigid set of procedures hosts must follow. Take what you want and ignore what you cannot use. But be prepared to help future hosts by providing information and advice after your meeting.

INTRODUCTION

The Law Librarians of New England hold up to three meetings each year. The Summer meeting is a breakfast or luncheon during the annual AALL conference, often held in conjunction with the Southern New England Law Librarians Association (SNELLA). The Fall and Spring meetings usually deal with substantive areas of the law or an aspect of librarianship. These meetings are planned for various locations in LLNE's geographic area.

The LLNE Education Committee, the host librarians and the LLNE officers play important and interactive roles in planning a successful meeting.

1.   LLNE Education Committee

The Education Committee includes the two LLNE Directors and additional members who may be designated by the President. According to the chapter by-laws, the Education Committee tentatively schedules host libraries, approximate dates, and suggested topics on a rolling schedule that is two to three years in advance. The committee reconfirms the host's commitment periodically and makes a final confirmation about one year to six months before the meeting slot. The committee acts as a resource for the host in picking exact dates, choosing locations, selecting topics and determining formats.

After the conference, the Education Committee collects evaluative reports, statistics, and budgetary information on the meeting from the hosts and the LLNE Treasurer. Copies of this information are made available to future hosts to assist them in planning meetings.

2.   Host

Hosts accept responsibility for holding the meeting both personally and on behalf of their institutions. Hosts have overall responsibility for the meeting. They determine the committees needed to plan and carry out the meeting, recruit committee members, delegate specific tasks to committee chairpersons and coordinate communication among committees. Hosts may select the topic or may adopt one suggested by the Education Committee. Hosts coordinate specific details, as necessary, with the various LLNE officers.

3.   LLNE Officers and Committees

       The LLNE President maintains contact with the Education Committee and the host librarian. The President and the host must confer regarding the timing of Executive Board and LLNE business meetings during the conference. The Spring Meeting must include the annual business meeting at which officers are elected. The President is also responsible for inviting any AALL officers to the meeting, subject to AALL policies on chapter visits, or other special guests, and for coordinating with the host in this matter.

       The Treasurer will provide the mailing list or labels for all mailings to the membership. The LLNE Treasurer pays the bills and deposits the receipts, which are usually collected by the host. The Treasurer must be notified in advance if checks are needed to pay vendors at the meeting itself.

       If requested by the host, the LLNE Secretary and Communications Committee assists with publicity about the meeting. Notices can be posted to relevant discussion groups and sent to the newsletters of AALL and other chapters, local legal newspapers in the New England states, other interested library or legal organizations, etc.

I. PRELIMINARY PLANNING PROCEDURES

Preliminary planning is done three years to six months prior to the meeting.

A. Education Committee

    1.   Choose hosts for specific meeting slots on a rolling three-year schedule.

        a.   Consider the season and the tourist activity at any prospective location.

        b.   Explore the possibility of a joint meeting with another organization.

    2.   At least one year prior to the meeting date, confirm with the host the acceptance of responsibility for the meeting.

        a.   Send host copies of the LLNE Meeting Planning Manual for committee members.

    3.   Discuss topics for the meeting with each host, keeping in mind the topics that have preceded the meeting and the subjects of current interest to the membership, as well as any subject specialty of the host institution.

B. Education Committee and Host in Conjunction

    1.   Determine if the meeting is to be a joint meeting. Also, coordinate with the New England Law Library Consortium (NELLCO) to determine if they will hold a meeting in conjunction with the LLNE meeting.

    2.   Finalize the meeting topic(s).

    3.   Determine the length, time frame and precise date(s) of the meeting.

        a.   Consider the distance that participants must travel and the most convenient times to begin and end the meeting.

        b.   In setting dates, consider activities at the host institution.

C. <u>Host</u>

1. Organize the planning committees for the meeting.

   a. The host determines the committees needed to plan and execute a successful meeting. For shorter meetings, large institutional hosts may have enough staff for needed committees; smaller hosts should ask other LLNE members to serve on committees. For longer meetings or joint meetings, Program and Local Arrangements Committees are suggested with subcommittees for each as needed. A host also may decide to have a separate Budget Committee.

   b. Program Committee: Chairperson should be knowledgeable and enthusiastic about the program topic. Committee members need not be limited to persons in the host institution or area.

   c. Local Arrangements: Chairperson should be experienced in dealing with space and meal vendors. Committee members should live in the host area.

2. Topic & Format

   a. Try to select a topic or topics that will appeal to a wide range of members. A recent education member survey showed that folks are interested in learning about practical skills, programs and procedures that they can bring back to their libraries and share and implement with their colleagues. Some examples include: Harvard's e-book revolution or the meeting at Suffolk that focused on collaboration. For more details about what our members are looking for, be sure to review the survey: (Include link to education survey – I thought this had been posted to the new LLNE website – but I don't see it – do you?)

   b. Before finalizing a topic, check the past meetings on the LLNE meetings page to make sure your topic hasn't already been covered in recent years: http://llne.org/meetings/

   c. Our members are interested in a variety of meeting formats. A hybrid approach that combines traditional panel discussions with sessions that adopt an interactive or un-conference approach would be ideal. Completely interactive/unconference formats would also work well. For a great example of an un-conference format, see Harvard's Faculty Services Showcase Showdown & Outreach and Student Services Showcase Showdown: http://bit.ly/1kbAmUo

3. Evaluate potential meeting sites and hotels for overnight accommodations.

   a. Consider convenience of and security of location; adequate space requirements for registration, meetings, functions and exhibits; price and value; accessibility to public transportation, restaurants and entertainment;

availability of parking; and accessibility as required by the Americans with Disabilities Act.

    b.   Evaluate the helpfulness and flexibility of management and staff at the function site. There will be last minute needs and changes and site managers must be willing to accommodate the host.

4.   Decide if the meeting will have exhibits. Establish exhibitor registration policies, procedures, fees and space requirements for exhibits.

    a.   Determine the approximate number of exhibits wanted, the location and quantity of space needed, and the placement in the program of time to visit the exhibits.

    b.   Determine the schedule of charges to exhibitors. Determine if exhibitors will be expected to register as participants, paying a separate registration fee, or whether their exhibitor fee will give them access to any or all events, programs and meal functions.

    c.   Determine, by telephone inquiry to the responsible representatives of potential exhibitors, the number of vendors and other organizations interested in mounting an exhibit and the potential size of each exhibit.

    d.   Determine the furniture and equipment needs, electrical, data and telephone requirements of potential exhibitors.

(Rewrite to include sponsors, exhibitors and vendors together)

5.   When space and technical requirements have been determined for programs, functions and exhibits, tentatively reserve space at the hotel, host institution, or other location.

6.   Reserve a block of hotel rooms.

    a.   Participants may arrive the evening before a meeting and stay through a weekend in a popular location.

    b.   Consider statistics from previous meetings, any special group rates, weekend packages, etc.

    c.   Discuss reservation procedures with the hotel. Typically, the host notifies LLNE members of available hotel rooms in the program announcement packet. Members are required to reserve rooms directly with the hotel by a certain date (often two weeks preceding the meeting). After that date, no rooms are guaranteed to LLNE members at the quoted rates. The host should make certain the hotel will not hold LLNE responsible for any unreserved rooms in the block.

d. Inquire whether a hospitality suite is complimentary with the block reservation. This allows members to meet the evening before the program begins, and is especially nice for newer members to meet their colleagues.

e. Provide accommodations for the planning committee for the duration of the meeting if necessary.

7. Determine vendor sponsorship policy and whether sponsors will be allowed to exhibit or to attend meeting or social functions in exchange for sponsorship. The LLNE Education Committee guidelines on sponsorship are included in Section C. 6 of the Preliminary Planning Suggestions following this section.

8. Prepare a preliminary budget.

a. Include the following items in the budget:

1.) Fees for meeting, function and exhibit rooms, including security and equipment rentals (microphones, lecterns, AV equipment, etc.).

2.) Costs for each meal, break or reception, including tax and service gratuities.

3.) Honoraria for non-member speakers.

4.) Costs for all speakers , including hotels, meals, and transportation. (Bare minimum registration fees should be waived)

5.) Printing and mailing costs for the program announcement and the registration folders, contents and handouts to be distributed at the meeting.

6.) A lump sum for miscellaneous expenses including nametags, flowers and other decorations, telephone calls, photographer's fees, etc.

7.) If applicable, calculate potential contributions from sponsors and fees from exhibitors which will offset the above expenses.

b. Set a preliminary registration fee for the meeting. The goal is to cover all expenses. Review the range of fees for prior meetings of the same type. Consult with the Education Committee and the President on the fee.

9. Meet periodically with the planning committee chairpersons and provide progress reports to the LLNE Education Committee.

PRELIMINARY PLANNING SUGGESTIONS

LLNE hosts have provided the following suggestions to accompany the preliminary planning procedures in the previous section. The suggestions are numbered to correspond to the procedures they supplement.

A.1.   Meeting Schedule

The Education Committee will always try to schedule ahead but may have to change hosts and locations for various good reasons (the budget, ABA inspections, site construction, personnel changes, etc.). Changes may be necessary on short notice.

The Education Committee must use judicious reminders and periodic reconfirmations to identify problems as early as possible. A letter may be sent to the host designed to elicit a written reply confirming the undertaking.

B.1.   Joint Meetings

If the meeting is to be with another group, such as SNELLA, ABLL, ALLUNY, or LLAGNY, the LLNE Education Committee chairperson and the host must communicate and coordinate with their counterparts in the other organization. Local arrangements are usually handled by the host in the location (whether LLNE or the other organization), but all participating groups should play major roles in determining the direction of the meeting and in presenting substantial parts of the program.

Acknowledgments of the joint participation and responsibility should be made in all announcements of the meeting and in all materials prepared for the meeting, and credit must be given during the meeting, especially in any remarks made at a closing luncheon or banquet.

B.1.   NELLCO

The NELLCO Executive Director often schedules a meeting the afternoon before the Fall and Spring LLNE meetings at the hotel or institution LLNE selects for the meeting. The host should advise NELLCO of the date and location for the LLNE meeting. The Executive Director should arrange and pay for meeting rooms, refreshments, etc. for any NELLCO meetings held in conjunction with the LLNE meeting. In the past many hotels have made a small room available to NELLCO without charge.

B.3.   Meeting Dates

The host suggests convenient dates to the Education Committee and they agree on several possible dates. The host checks on the cost and availability of meeting sites and hotels and makes reservations, conferring with the Education Committee as necessary.

Experience shows that holiday weekends should be avoided; as well as all religious holidays for all faiths.

Be aware of other major events that may prevent members from attending or cause hotels to be booked or prohibitively expensive in a given area. For example, October is the preferred month for the Fall meeting since September is too early and November begins to get too close to the major holidays.

A law school host may wish to arrange the Spring meeting during the school's spring break, so that classrooms and parking spaces can be used. If the meeting is too late in the Spring, both academic members and law firm members may have trouble getting away because of exams and preparations for summer associates. Thus the end of March and the earlier part of April constitute the main "window" for this meeting.

B.3.   Length and Time Frame of Meeting

The Fall and Spring Meetings are usually between one and three days, involving one or two overnights for out-of town members. Usually the longer the meeting, the longer the distance you can expect people to travel.

The exact format of the meeting will vary, but usually one day meetings are held on a Friday. Longer meetings begin on Thursday or Friday and end on Saturday or Sunday. Generally speaking, it is better to occupy only one weekday with a meeting; many members find it difficult to take two days off from work.

Because of travel times, it is not advisable to begin anything too early on the morning of the first day, though it is helpful to have an unstructured activity available for early arrivals, such as a library tour, exhibits, a walking tour, etc.

A host will frequently plan to end a meeting with a food or social event. Some members welcome the opportunity for informal contact, but others prefer to return to work or leave for home, so an event such as dinner, a night on the town, or a breakfast will be underattended relative to the entire meeting. A lunch is fairly safe as the closing event, especially if there is a speaker or a business meeting; members will still have enough travel time left and will not rush. A major dinner event is often preferable on the first night, rather than the second.

C.2, 4, 5.   Selecting a Meeting Site and Hotel Accommodations

Hotels usually won't charge for meeting rooms if the host guarantees that a certain amount will be spent on meals, etc. for the meeting.

When selecting and reserving meeting/function/exhibit space, make certain the room size and set-ups (theater style, seminar style, etc.) are appropriate to the size of the audience and the program format. Use previous statistics from former hosts or the Education Committee to determine the approximate attendance figures.

When choosing a hotel for overnight accommodations, proximity to the meeting site, security and value are important considerations.

C.6.   Sponsorship

LLNE has no firm policy on sponsorship by vendors or other organizations. Each host is free to decide whether to invite sponsorship, whether to accept offers of sponsorship or whether to let LLNE be the sole program sponsor. Hosts may seek monetary contributions from sponsors or ask for donations of gifts or items to raffle at various program functions and social events.

In deciding on financial sponsorship, the host should consider the following guidelines established by the LLNE Education Committee:

1.   The financial goal of each program is to break even. If program expenses will be considerable due to outside speaker expenses, etc., the host should consider sponsorship.

2.   The host should be sensitive to previous LLNE requests for sponsorship and vary sponsors, if appropriate. For example, has a vendor been asked to sponsor the previous LLNE program, to pay the costs of producing or mailing a recent LLNE publication, etc.? The host also must be sensitive to the financial needs of future LLNE hosts or special upcoming events LLNE may seek sponsorship for. However, even if a sponsor has recently contributed to LLNE, vendors with whom the host has a long or active professional relationship may be very willing to sponsor two or more events in a row. The host should coordinate with the LLNE President and Education Committee on selecting sponsors.

3.   Fundraising is most effective if the host contacts a known vendor representative rather than an unknown name at corporate headquarters. If local representatives need higher authority, they may request the host to call or write a letter to the appropriate corporate contact.

4.   Experience indicates that potential sponsors appreciate the following information when contacted for contributions: meeting dates, program topic, estimated attendance, information and costs concerning functions they can sponsor, other sponsors to date, and the availability of exhibit space.

   a.   Hosts can provide general cost information to sponsors, e.g., a reception with wine and hors d'oeuvres for 75 will cost $1000; a coffee break with pastries for 75 will cost $500, etc.

5.   Hosts should suggest optional food functions to sponsor and also the option of partial sponsorship at the vendor's discretion or sharing co-sponsorship with other compatible vendors, e.g., an online vendor and a print vendor.

6.   It is appropriate for the host to invite a sponsor to a function or occasionally to the entire program if the amount of the gift is substantial enough to warrant extending a complimentary meal or full program invitation.

Judgment should be exercised in inviting sponsors to the entire meeting. If a program is longer than one day and involves several major food or entertainment functions LLNE must pay for, the cost of the meals to LLNE will negate the sponsor's gift. Invitations to sponsors must be determined by the individual host in light of the specific program budget.

7.   Potential sponsors will want to know if they can exhibit during the program. Hosts can easily arrange to have tables set up in the meeting registration area for vendor brochures. Sections I.C.3. and II.B.S. of this manual discuss more formal exhibitor space, policies, procedures and fees.

8.   Hosts should follow-up on initial sponsor commitments with a letter detailing the amount discussed, any invitations extended and expressing LLNE's appreciation for the sponsor's support of our educational programs.

9.   Hosts should make arrangements for LLNE to thank sponsors during the meeting: a sponsorship notice is usually placed in the program registration packet; signs may be displayed during a sponsored function; the LLNE President names and thanks sponsors during the luncheon; thank you letters are sent by the host following the program.

C.7.   Budget

A preliminary budget is a very useful planning tool, but the hosts should not determine the actual budget and registration fee too early. The hosts should make the final determination right before the meeting announcement is prepared; by then, all the arrangements should be complete and all the costs known, as well as contributions from sponsors and exhibitor fees from vendors.

In setting the registration fee, the host should keep in mind all of the expenses to the attendees, including hotel and transportation costs. If our meetings are affordable, more members will attend and be active in the association.

As a rule, LLNE tries to break even on meetings, but it is as permissible to run a small deficit -- especially if several good speakers who require honoraria are invited -- as it is to produce a profit.

II.   PRE-MEETING PLANNING PROCEDURES

Pre-meeting planning is done during the six months before the meeting.

A. Program Committee

1.   Begin planning at least six months before the date of the meeting and schedule regular meetings.

2.   Establish content and format of program.

a.   Refine the subject areas to be covered.

b.   Determine the presentation format: lecture, panel, discussion groups, workshop, etc. Try for a variety of formats.

c.   Determine the time slots to be allotted to the program and those allotted to food and social events and field trips, if any.

3.   Secure the program participants and moderator.

a.   Honoraria Speaker Fees.

1.)   Appropriate honoraria may be offered to program participants.

2.)   LLNE members are not eligible to receive honoraria when they perform as program participants but registration may be waived.

b.   Transportation, lodging and miscellaneous expenses.

1.)   Reimbursement for transportation and certain miscellaneous expenses may be made to all speakers . Individuals should make their own travel arrangements and turn in expense statements to their contact persons.

2.)   Lodging will be provided to all speaker participants; reservations and arrangements will be made by the host or appropriate committee member.

3.)   By decision of the Executive Board, LLNE members are not eligible for travel or lodging expenses when they perform as program participants.

c. Initial Contact. Experience shows that speakers are more likely to participate if contacted by someone who has a professional or personal connection to the individual. The initial contact, whether by phone or letter, should provide the prospective participant with the following information:

 1.) Name of the sponsoring organization(s)

 2.) Nature and purpose of the meeting

 3.) Date, place and time of the meeting

 4.) Why the individual is considered an appropriate participant

 5.) Names of other participants

 6.) Type of presentation desired

 7.) Amount of time allotted

 8.) Background and number of registrants expected

 9.) Scheduled time to speak and suggested time of arrival

 10.) Invitation to join membership and other participants for luncheon, reception, etc.

 11.) Expenses and honoraria

 12.) Name, mailing and e-mail addresses, phone and fax numbers of contact person

 13.) Need for special equipment (projector, computer, etc.)

d. The confirmation letter (See Sample Forms and Letters) should repeat the above and provide additional information on room reservations, travel arrangements, etc. It should include a request for biographical information and a request for copies of any handouts that will be used or furnished by the participant. The host should offer to reproduce copies of handouts if a master is provided. Also include a release for permission (sample in appendix) to reproduce the presentation on the LLNE site and for the public.

e.   Make necessary provisions for social responsibilities toward non-LLNE participants. Assign contact person, pick-up at airport, escort to events, etc.

f.   Stay in regular contact with program participants and ensure that final details are agreed upon at least two weeks before the meeting. Obtain masters for reproduction and check again on equipment needs. Confirm arrival times and whether participants will join LLNE at the luncheon, etc. This call should complete all the information the participant needs to arrive at the meeting room door at the right time on the right day.

g.   Ask program participants if they are willing to share slides to be posted by LLNE. (See appendix for sample release form.)

h.   As a final assurance that participants will attend and be prepared, they should be contacted two days before the meeting. This can be done under the guise of "We wanted to be in touch one last time to see if there are any final details we can take care of for your presentation on Friday."

4.   Provide for program back-up.

a.   Be prepared for cancellations and try to have an alternative plan or person in mind. Move quickly if anything is cancelled or seems likely to fall through.

b.   Consider how to rearrange the program or make a substitution in case one of the participants, especially the first one on the program, is late.

5.   Coordinate local arrangements with the site manager for the proper room setups for programs, including the necessary furniture, lecterns, microphones, computers, slide or overhead projectors, screens and other equipment as needed. Don't assume the site manager will know what is wanted, or that everything is included in the initial fee.

6.   Prepare a sufficient number of the required handouts for the meeting, and arrange for their delivery to the site. Double-check with participants who say they will bring their handouts with them.

7.   Assign time-keepers from the program or local arrangements committees for all programs and events, so that one late meeting doesn't disrupt the entire program schedule.

8. Make necessary arrangements to have programs taped or recorded, if desired.

B. Local Arrangements

1. Begin planning at least six months before the date of the meeting and schedule regular meetings.

2. Assign areas of responsibility, including the following:

   a. Social and food events (breaks, luncheons, reception, etc.)

   b. Field trips (for program events or social events)

   c. Exhibits, if any (Coordinate with Program Committee)

   d. Function rooms (Coordinate with Program Committee)

   e. Publicity

   f. Registration

3. Social and food events

   a. Determine the scheduling and the type of event needed in each slot.

   b. Finalize sponsorship of social events.

   c. Collect information as to the number of persons expected to attend each event, including any guests or sponsors.

      1.) Plan and reserve head tables for LLNE officers and hosts, speakers, sponsors and special guests.

   d. Choose menus.

      1.) Coordinate with the sponsors, if any, on the selection of food and beverages.

      2.) Make arrangements for special diets.

      3.) Coordinate with the person in charge of the meeting budget regarding the cost of social and food events.

4.) Include information in the meeting announcement.

 e. Schedule breaks for participants.

4. Field trips

 a. Collect all pertinent information from the Program Committee as to events scheduled, type of event, and sponsorship.

 b. Contact the institutions and places to be visited. Find out what requirements and restrictions may exist.

 c. Make arrangements for transportation, if necessary. Be sure to check on insurance coverage for property damage and personal injury.

 d. All registration packet information, (including flyers, forms, directions, etc. forward to the Registration Subcommittee.

5. Exhibits

 a. Confirm the space, furniture and equipment requirements for exhibits with the exhibitors and the site manager.

 b. Confirm the availability of electrical, data and telephone connections with the site manager.

 c. Determine what must be done to prepare the site for the exhibitors and who will do it. Check with each exhibitor on whether he will bring his booth or expects one to be available to him. If the vendor intends to bring a booth or booth decorating material, inquire about compliance with local fireproofing requirements.

 d. Determine the schedule for delivery, set -up, and break-down of exhibitors' materials. Determine the source and coverage of security for the exhibit area.

 e. Prepare and mail the formal invitations and information to the exhibitors.

  1.) The invitation should include copies of all registration material and information on the number of registrants expected.

2.) The invitation should specify any special arrangements offered to the exhibitors and give complete information on charges, including when to pay, where to send the check, and how to make out the check.

3.) The invitation should include information from the hotel or institution on security and insurance arrangements.

f. Process the responses from the exhibitors.

1.) Acknowledge each reservation, including all necessary information the exhibitor will need to set up his exhibit (even if this duplicates information given out previously).

2.) Update the exhibitor file with names, mail and e-mail addresses, and telephone and fax numbers of contact persons and payment of required fees.

3.) Deposit the reservation checks or forward them to the appropriate person.

4.) Prepare name tags for the exhibitors, clearly identifying them as vendors.

g. Schedule staffing, if needed, for the exhibit area either from committee members or the host institution.

h. Double-check on the security scheduled for the exhibit area and who to contact in case of an emergency.
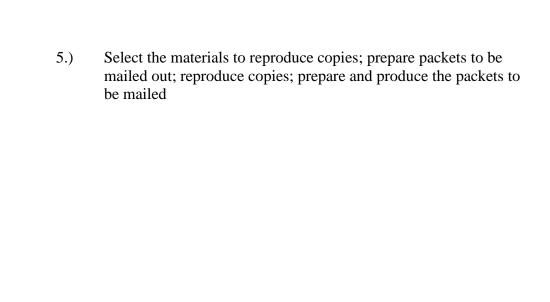
6. Function rooms

a. Finalize information on the types of events, both program and social, in order to determine the room sizes needed and the desired set-ups (theater, single speaker or panel, round table, demonstrations, etc.)

b. Coordinate with the site manager on dates and times, size of room, and type of set-up.

7. Publicity

    a. Coordinate with the LLNE Communications and Technology Committees, as well as any co-hosting organizations for publicity. Write a news release at least three months prior to the meeting and disseminate in the following formats:

        1.) If timely, formal publications like <u>LLNE News</u> and the <u>AALL Spectrum</u>.

        2.) Discussion lists: LLNE, LAW-LIB, AALLNET, etc.

        3.) Depending on the program topic, publicize the meeting in special library or legal newsletters and discussion lists. Include registration information for non-members. Post registration material on LLNE website.

        4.) LLNE website and related social media outlets.

        5.) Obtain a photographer for the meeting, if desired.

8. Registration

    a. Determine registration and refund policies and fees for the meeting for members and non-members.

    b. Prepare the program announcement and registration mailing for the members. (See Sample Forms and Letters)

        1.) Plan to mail the registration information out at least four, and preferably up to six, weeks before the deadline for hotel reservations. Reminders and program updates can be posted to the LLNE discussion list.

        2.) Collect all pertinent information on substantive and social programs.

        3.) Collect all pertinent information and forms dealing with the reservation of hotel rooms, parking availability, directions, maps, tourist information, restaurant guides, etc.

        4.) Design and prepare an invitation letter from the host, the program description and schedule, registration and reservation forms, parking stickers, etc.

            a.) The registration form should request information on special accommodations (e.g. interpreters), special meals, etc.

5.)   Select the materials to reproduce copies; prepare packets to be mailed out; reproduce copies; prepare and produce the packets to be mailed

6.) Purchase mailing envelopes of the requisite size and quantity. As necessary, buy stamps or obtain use of a postage meter.

7.) Prepare mailing labels or obtain them from the LLNE Secretary. Stuff and mail the program and registration packets to the members.

8.) Also make registration material available on the LLNE website.

9.) Consider electronic registration.

c. Process the registration responses from the members.

1.) Maintain a registrants' file with names, institutions, mail and e-mail addresses, telephone and fax numbers, payment status and information on special needs or meals.

2.) Forward checks to the LLNE Treasurer. Keep records on payments and packets of checks sent.

3.) Prepare name tags.

4.) Prepare receipts for participants.

5.) Make a notation of any outstanding fees to be collected at the meeting.

6.) Make arrangements for requested accommodations, e.g. interpreters, equipment, etc.

d. Assemble the registration packets to distribute with the name tags at the program. Registration packets often contain:

1.) Final program with room locations

2.) Directions or information for tours or special program events

3.) Speaker biographies

4.) Bibliography on program topic

5.) Handouts on topic

6.) Directory of exhibitors

7.) Acknowledgement of vendor sponsorship of events

8.)   Parking stickers or passes

9.)   Meal or event tickets, if needed

10.)   Guides to restaurants and entertainment

11.)   Paper and pen

e.   Provide evaluation questionnaires to the registrants. Put a return address on the form for those who prefer to complete the form at home and mail it back.

1.)   A sample copy of an evaluation form is located in the back of the Manual.

f.   Determine the location and staffing of the registration desk. Coordinate with the site manager for a registration table and signage. If possible, post the entire meeting schedule.

PRE-MEETING PLANNING SUGGESTIONS

(Incorporate into main sections)?

LLNE hosts have provided the following suggestions to accompany the pre-meeting planning procedures in the previous section. The suggestions are numbered to correspond to the procedures they supplement.

A.2   Program Format and Scheduling

9.   Do not start the substantive program too early, e.g. before 9: 30 or 10AM, on the first day of the meeting. Participants may be driving in that morning from out of town. Schedule continental breakfast, tours or exhibits for early arrivals.

10.   People should not be made to sit for more than 90 minutes.

11.   Continental breakfast, breaks, and luncheon should be scheduled on the premises when at all possible.

12.   One hour and fifteen minutes is probably the minimum time that should be allowed for luncheon on the premises. Allow extra time if the Business Meeting is held in conjunction with the luncheon. One and a half to two hours should be allowed for "on your own" or off-premises luncheons.

13.   Allow breaks of at least fifteen minutes between sessions so that people can stretch, use the facilities, etc. This is especially important before and after a meal.

14.   Leave adequate time between ending the substantive portion of the program and the beginning of dinner or an evening social event. Some members may want to go back to the hotel room to change. Other members who are not staying in the hotel will have this time free; try to suggest alternative activities.

A.3   Program Participants

Keep in mind the benefits of staying flexible in your plans for speakers and topics. At one LLNE meeting a prominent speaker on the main topic became available 24 hours before the meeting. The host moved quickly to extend the invitation, coordinate the timing, change the program and the schedule handout, and the addition was a great success. Try to check out programs and events scheduled at the same time in your area, especially by your institution, to see whether a good speaker might be able to squeeze in our meeting as a "lesser included" event.

A.3.d. Program announcements and Speaker Permissions

Send an advance copy of the program to each speaker so they know how long each presentation is expected to be, who else will be speaking and the profile of the audience.

If desired, ask speakers for permission to publish their remarks, to be taped for future use, and to be photographed for publicity purposes.

A.3.e. Speaker Escorts

Each speaker should be assigned an escort who has no program responsibilities on the day of the presentation. The escort will be responsible for making certain the speaker arrives on time and for accompanying the speaker between the airport or hotel and the program site, if necessary. The escort can introduce the speaker to other participants, LLNE officers, program hosts, etc. and assist the speaker by testing equipment, distributing handouts, obtaining water, accompanying the speaker to the luncheon or reception, calling a cab when the speaker is ready to leave, etc. The escort should carry a list of all potentially useful names, addresses and phone numbers. Last-minute problems often happen, and communication or alternative transportation may become necessary.

A.5. and B.6. Cleaning Meeting Rooms

Provide for the cleaning of on-site meeting rooms. If the meeting rooms are at an educational institution, inform the custodial staff of the meeting dates well in advance and remind them as the date approaches. Ask them to make certain the rooms are neat and clean and to monitor the rooms during the entire meeting.

B.3 Social and Food Events

Possible food functions include:

1.) continental breakfast
2.) mid-morning break
3.) luncheon
4.) mid-afternoon break or afternoon tea
5.) reception with wine and hors d'oeuvres
6.) dinner or banquet

The types of food functions that will be included in the registration depend on the format of the meeting, the available facilities, the timing of various events, and the accessibility of near-by restaurants. The meeting usually includes two to four major food functions, and one to three minor ones. Unless the meeting is held at an isolated resort location, not all meals should be included in the registration and as the host's responsibility. LLNE members like to go out on their own in small groups. To facilitate this, the registration packet should include a directory or listing of appropriate local restaurants, with maps or directions. Remember to schedule as many breaks and luncheons as possible on the premises.

Continental breakfast should include decaffeinated as well as regular coffee and juice. Pastry should include a variety of sweet items like muffins and less sweet items like bagels.

Snacks provided at breaks can be simple. Afternoon breaks should offer cold as well as hot drinks. Provide juice and sparkling waters as well as colas and sodas. Fruit is often a welcome addition.

B.3.d. Choosing Menus

In planning meals, be careful with the menus. Light lunches are usually preferred to heavy, hot meals. If possible a choice of entrees should be offered for dinners. Before making a decision of a dining location, try the food ahead of time. Discuss arrangements and selections for special meals, e.g. vegetarian, kosher, etc., with the hotel, restaurant or caterer in advance. If the meal provider needs to know the number and type of special meals in advance, include the options on the registration form and ask participants to indicate their selections.

B.3.e. Breaks

If possible, hold scheduled breaks outside the meeting room. It allows members to change environments and provides the opportunity to mingle. In addition, the service staff can set up and clear away without disturbing the program.

B.6.   Function Rooms

When reserving rooms for special functions, remember to include appropriate space for committee meetings of the LLNE Executive Board, subcommittees, etc. Finalize coordination with NELLCO on meeting space.

B.8.a. Registration and Refund Policies Fees

Registration for only part of a meeting is not feasible. Often hotel charges are based on a guaranteed number for all meal functions, so LLNE must absorb costs even if participants do not attend every program function. Therefore, partial registrations and payments are not allowed for LLNE meetings. However, a host has discretion to allow two co-workers to share one registration, e.g., one staff member would attend the program the first day and a co-worker would attend the second day. This accommodation is made because some LLNE members cannot attend programs unless their libraries are staffed. The co-workers would share one registration packet and only separate nametags would have to be made. Obviously, only one co-worker can attend each meal, break or reception during the meeting.

The host must establish a cancellation and refund policy.

B.8.b. Registration Mailing

The timing of mailing the registration forms is a delicate matter. If the mailing arrives "too early," the form may get misplaced and the whole matter forgotten; if it arrives "too late," then many will think there is not enough time to reply and won't come. Any mailing that arrives before Labor Day or during the Christmas holidays is probably doomed. Remember that law firm librarians often need a week or two extra to obtain permission from their firms.

If you are willing to take late payment from large institutions, say so on the form and tell people to mail or fax the registration form without the check, so that you will be able to plan.

Be clear in the mailing that hotel reservations go to a different address unless the host is also handling accommodations. Often the hotel has its own form, which should be included in the mailing. Also, try to get the hotel to indicate whether both parties sharing a room should send in reservations or whether only one party should, requesting the necessary accommodation. This has been a source of under- and over-registration in the past.

When giving written directions for driving to the site, do not do so from memory. Include a map whenever possible, as some drivers prefer visual rather than written directions. Give links to directions on the LLNE website.

Do not schedule addition events after the registration mailing has gone out, as the members often make plans for free time.

B.8.c.3.   Name Tags

Name tags should be prepared in the largest letters possible and should include the name of the registrant's institution. Local Arrangements Committee members and the speakers should be identified with fabric or paper ribbons affixed to the name tags.

B.8.c.6.   Special Accommodations

The Education Committee may know of agencies to contact to hire interpreters. Disability Services Offices at host universities also can be of assistance. Meeting hosts should make the arrangements for interpreters because they know the program schedule. LLNE pays for needed interpreters out of the general LLNE budget, not the specific program's budget. For further guidance see the LLNE Disabled Member Policy.

B.8.d.   Registration Packets

1.)   Registration materials should clearly indicate where each event is to occur. Any changes in events or venues made since the tentative schedule was sent in the initial mailing should be highlighted in the registration packet and should be announced at programs and meal events, and in signs. People who come late to the program, or who skip a portion of it, will not show up at the right location unless changes are well publicized. Notices should be posted at the hotel as well as at the meeting site. The hotel desk personnel should be given a daily schedule of events and locations.

8.)   If special parking accommodations must be made (e.g., to use 'a faculty lot), include parking stickers or passes in the registration packets.

9.)   Ask the hotel how attendees should designate meal choices. If colored slips are used, they must be included in the members' registration packets.

10.)   If a dining guide is included in the registration packet, be prepared to make specific recommendations. LLNE members will ask. If your Chamber of Commerce provides a Dining Guide, don't automatically use it. Contact the restaurants listed to verify that the information is still current.

III. MEETING PROCEDURES

A. Local Arrangements

1. Supervise the operation of the Registration Desk.

2. Supervise the set-up of the meeting rooms.

3. Supervise the set-up of the food and social areas.

4. Supervise the set-up of the Exhibit Area.

5. Supervise any field trip activities.

6. Arrangefor general signs announcing the LLNE meeting. If there are any last-minute changes in room locations, provide signs or a person to guide registrants to the new locations.

7. Make certain that the treasurer attends the meeting with the LLNE checkbook in hand, or that checks are signed in advance and available.

B. Program

1. Determine in advance that the meeting room holds everything that is necessary.

2. Brief the time-keepers to remind the program participants of time constraints.

3. Meet the program participants at the door.

   a. If the program participants are arriving on a staggered schedule, assign responsibility for watching for their arrivals.

   b. Arrange for the distribution of handouts.

   c. Determine if the program participants need instruction in the use of the microphone or other equipment, or an assistant to change overhead slides, etc.

4. The host should make frequent orientation and house-keeping announcements at the beginning of each day's program, at breaks, and before the meeting is concluded. Information on the location of telephones, restrooms, smoking areas, soda machines, etc. is appreciated.

5. Collect evaluation sheets, if provided, from the registrants at the last session of the program. A deposit box at the door is usually the best method.

6. If appropriate permissions have been arranged, collect the program participants' presentations for possible publication in the LLNE News.

7. Provide for the payment of honoraria and expenses before the program participant leaves the premises, if possible. If not, request a statement of expenses -from the participant as soon as possible.

MEETING SUGGESTIONS

LLNE Hosts have provided the following suggestions to accompany the meeting procedures in the previous section. The suggestions are numbered to correspond to the procedures they supplement.

A. <u>Local Arrangements Committee</u>

A.1. <u>Registration Desk</u>

The Registration Desk should be staffed until Noon on the first full day of the meeting to accommodate late arrivals. It is important that the people staffing the registration desk know their way around town and be able to give directions.

Be sure to have some sort of information board located near the registration desk for messages, changes in room locations, special notices, etc.

A.2. <u>Meeting Rooms</u>

Check that water and glasses are available, either in the back of the room, or on the tables if the room is set up seminar style. Check on the water in the carafe for speakers before the meeting, between speakers, and during breaks.

Check on the proper set-up of chairs, number of seats, participants' table or podium, microphones, audio-visual equipment, computer equipment, etc. Monitor equipment functioning throughout the meeting.

Monitor temperature and lighting in meeting rooms throughout the meeting and make adjustments as necessary.

Get the audience into the meeting room on time; otherwise the schedule for the speakers will be thrown off.

Make sure there is a clock in the meeting room, preferably one the speaker can see. Do not assume that every speaker will wear a watch. If necessary, bring a table clock with a clear face. This may prevent the speaker from asking the moderator how he is doing on time.

A.3.   Food and Social Areas

Provide the hotel or institution with an LLNE contact person for any needs or problems that may arise. Ask the hotel for a hotline number or the name and number of their contact person.

Know whom to see and where to find the right person in case of an emergency food situation. The most common problem is not enough food (this mainly happens at breakfast), which can sometimes be remedied if handled quickly enough. If any changes are made, check the bill for mistakes and overcharges, but be aware that the hotel may add a surcharge for last-minute changes.

Determine where attendees can smoke during breaks.

A.4   Exhibit Area

Provide the exhibitors with a LLNE contact person for any needs or problems that may arise. The contact person should know whom to call and where to go in the hotel or meeting site for help.

Review final requirements for electrical outlets, extension cords, datajacks, etc. Make sure that any previously requested equipment has been provided.

Review security arrangements for exhibit area.

A.5   Field Trip Activities

If possible, provide a committee member to go along on each field trip.

Publicize the location and times of the departing buses and the location and times of returning buses. Supervise the loading and departure of the buses.

Include driving directions to the events in the registration packet for those people who prefer to drive.

B.   Program Committee

B.1   Meeting Rooms

Noise from outside the room can be disruptive during a meeting. It can't always be prevented or stopped, but stationing someone by the door to check on it is wise. Cell phones and beepers should be shut off.

B.2   Time Keeper

The time keeper should give the first signal 10 minutes before the scheduled end of the talk, and a second signal 5 minutes before the end. Of course, the signals and the timing should be discussed with the speakers before the program begins.

IV.   POST-MEETING RESPONSIBILITIES

A.   Local Arrangements Committee

    1.   Supervise the break-down of the Exhibit Area.

    2.   Supervise the return of any rented equipment.

    3.   Hold a short evaluation session with the whole committee immediately after the meeting.

    4.   Collect and analyze the registration information. Send notices to collect any outstanding registration fees. Prepare an evaluation report with statistics for the Education Committee.

B.   Program Committee

    1.   Send thank-you letters (notes or emails) promptly to the participants, the sponsors, the exhibitors, the hotel, etc. (See Sample Forms and Letters)

    2.   Pay any expenses or honoraria promptly.

    3.   Provide a complete financial accounting to the LLNE treasurer, along with any unpaid bills. (See Sample Forms and Letters)

    4.   If applicable, forward evaluation forms and a copy of program videotapes or audiotapes to the Education Committee.

    5.   Forward any program participants' papers released for publication to the LLNE Education Committee editor.

C.   Education Committee

    1.   Send thank-you letters (notes or emails) promptly to host and members of the Local Arrangement and Program Committees (and others if warranted). (See Sample Forms and Letters)

V.   SAMPLE FORMS AND LETTERS

2014 LLNE Spring Meeting
University of Connecticut Law School
April 4, 2014

Revenue

Registrations	$2,200.00 (44 @ $50)
Vendors	$1,900.00
Total	**$4,100.00**

Expenses

Breakfast	$400.00 (50 @ $8.00)
Lunch	$1,430.00 (65 @ $22.00)
Food Service Charge	$214.50
Reception Food	$210.00 (35 @ $6.00)
Reception Bar	$280 (35 @ $8.00)
Reception Bartender	$85.00
Reception State Tax	$36.51
Airfare and Hotel	$670.70 (for one of the speakers)
Flowers	$207.00
"Goodie Bags"	$77.74 (for participants not staying for the reception)
Thank you gifts	$183.92 (for speakers and panelists)
Total	**$3795.37**

Note that UConn did not seek reimbursement for supplies like folders, nametags, photocopying, notepads, pens, pencils, and bags.

AUDIO/PHOTO/VIDEO MEDIA RELEASE FORM

I grant permission to *[Insert Program, Coalition, Organization name here]* and its agents or employees to use photographs and/or video and audio taken of me. These images may be used in educational and documentary materials such as Public Service Announcements, Grant Applications, Video Documentaries and both printed and online newsletters. Furthermore, I authorize the use of my image, likeness, and voice for all program promotion, materials, and any other purposes in connection with the program deemed appropriate and necessary by [*program, coalition, organization names*].

I hereby agree to release, defend, and hold harmless [organization] and its agents or employees, including any firm publishing and/or distributing the finished product in whole or in part, whether on paper, via electronic media, or on Web sites, from any claim, damages, or liability arising from or related to the use of the photographs/video, including but not limited to any misuse, distortion, blurring, alteration, optical illusion, or use in composite form, either intentionally or otherwise, that may occur or be produced in taking, processing, reduction, or production of the finished product, its publication, or distribution.

I am 18 years of age or older and have read this release before signing below, fully understanding the contents, meaning, and impact of this release. I understand that I am free to address any specific questions regarding this release by submitting those questions in writing prior to signing, and I agree that my failure to do so will be interpreted as a free and knowledgeable acceptance of the terms of this release.

_____

Name (please print)

_____

Signature   Date

2013 LLNE Spring Meeting Survey Results

Which of the following best describes you or where you work:

	answered question	51
	skipped question	1

	Response Percent	Response Count
Law School	62.7%	32
Law Firm	23.5%	12
Corporate	2.0%	1
State Government	7.8%	4
Federal Government	2.0%	1
Non-Law College/University	0.0%	0
Library Student	0.0%	0
Law Student	0.0%	0
Other	2.0%	1

Please give us your feedback on Neuroscience and the Law (March 8, 2013), hosted by New England Law/Boston:

	answered question				41
	skipped question				11

	Very Satisfied	Satisfied	Unsatisfied	N/A	Rating Count
Meeting topic (Neuroscience & The Law)	22.0% (9)	17.1% (7)	2.4% (1)	58.5% (24)	41
Speakers	24.4% (10)	9.8% (4)	0.0% (0)	65.9% (27)	41

Time allotted for each speaker	17.9% (7)	15.4% (6)	0.0% (0)	66.7% (26)	39
Time allotted for questions & group discussion	17.5% (7)	15.0% (6)	0.0% (0)	67.5% (27)	40
Use of media to enhance presentations	10.0% (4)	22.5% (9)	0.0% (0)	67.5% (27)	40
Meeting location (Boston)	31.7% (13)	14.6% (6)	0.0% (0)	53.7% (22)	41
Lunch location	14.6% (6)	14.6% (6)	0.0% (0)	70.7% (29)	41
Vendor representation	15.0% (6)	17.5% (7)	0.0% (0)	67.5% (27)	40
LLNE service project	17.1% (7)	19.5% (8)	0.0% (0)	63.4% (26)	41
LibGuides Bibliography	22.5% (9)	7.5% (3)	0.0% (0)	70.0% (28)	40
LLNE scholarship opportunities	15.0% (6)	15.0% (6)	0.0% (0)	70.0% (28)	40
				Other (please specify)	19
				Show Responses	

. What are you most interested in seeing at future LLNE meetings?

answered question		**50**
skipped question		**2**

	Response Percent	**Response Count**
An entire day devoted to a specific subject	12.0%	6

		40.0%		20
An entire day devoted to practical topics (e.g. how do law librarians work together to better prepare students for practice or how do we provide services under increasingly shrinking budgets and staff)				
A hybrid approach with some subject specific/some practical		48.0%		24
		Other (please specify) **Show Responses**		6

What topics would you like to see covered at future LLNE meetings?

	answered question	51
	skipped question	1

	Very Interested	**Interested**	**Uninterested**	**N/A**	**Rating Count**
Legal Education	41.3% (19)	45.7% (21)	10.9% (5)	2.2% (1)	46
Law Librarianship	52.1% (25)	35.4% (17)	10.4% (5)	2.1% (1)	48
Technology	76.0% (38)	22.0% (11)	2.0% (1)	0.0% (0)	50
Teaching	43.8% (21)	33.3% (16)	20.8% (10)	2.1% (1)	48
Reference	43.8% (21)	37.5% (18)	16.7% (8)	2.1% (1)	48
Collaboration	36.7% (18)	49.0% (24)	14.3% (7)	0.0% (0)	49
Technical Services	18.8% (9)	58.3% (28)	22.9% (11)	0.0% (0)	48
Digital Initiatives	55.3% (26)	34.0% (16)	8.5% (4)	2.1%	47

				(1)	
Circulation/ILL	11.1% (5)	42.2% (19)	42.2% (19)	4.4% (2)	45
Budget Issues	37.5% (18)	37.5% (18)	25.0% (12)	0.0% (0)	48
Staffing	31.9% (15)	38.3% (18)	29.8% (14)	0.0% (0)	47
Space Issues	26.1% (12)	41.3% (19)	32.6% (15)	0.0% (0)	46
Print v. Online	39.2% (20)	54.9% (28)	5.9% (3)	0.0% (0)	51
Student/Faculty Outreach	30.4% (14)	32.6% (15)	34.8% (16)	2.2% (1)	46
Intellectual Property	28.9% (13)	46.7% (21)	22.2% (10)	2.2% (1)	45
Constitutional Law	11.1% (5)	40.0% (18)	46.7% (21)	2.2% (1)	45
International Law	13.3% (6)	51.1% (23)	33.3% (15)	2.2% (1)	45
Environmental Law	17.4% (8)	45.7% (21)	34.8% (16)	2.2% (1)	46
Health Law	19.6% (9)	41.3% (19)	37.0% (17)	2.2% (1)	46
Interdisciplinary Topics	26.7% (12)	44.4% (20)	24.4% (11)	4.4% (2)	45
Film & The Law	24.4% (11)	26.7% (12)	44.4% (20)	4.4% (2)	45
Statistical Analysis	20.0% (9)	46.7% (21)	31.1% (14)	2.2% (1)	45
				Other (please specify)	2

How interested are you in seeing the following meeting formats at future LLNE meetings?

	Very Interested	Interested	Uninterested	N/A	Rating Count
answered question					51
skipped question					1
Lecture style with time for questions at the end	26.5% (13)	69.4% (34)	4.1% (2)	0.0% (0)	49
Presentation followed by moderated discussion among attendees	46.0% (23)	50.0% (25)	4.0% (2)	0.0% (0)	50
Presentation followed by un-moderated discussion among attendees	17.0% (8)	51.1% (24)	31.9% (15)	0.0% (0)	47
Un-conference (i.e. attendee generated discussions)	16.3% (8)	40.8% (20)	42.9% (21)	0.0% (0)	49
Interactive (clickers, etc.)	12.5% (6)	52.1% (25)	33.3% (16)	2.1% (1)	48
Hands-on practical training	40.8% (20)	46.9% (23)	12.2% (6)	0.0% (0)	49