Conference Planning Guidelines

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NYSLAA Conference Planning Guidelines

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Planning a Conference I

I. Getting Started

Definition of the Key Players

- **NYSLAA Executive Council (Council)** – The owners and financial backers of the Annual Conference. All conference plans must be approved by the Council including all financial expenditures, scheduling, logistical decisions, recommendations and suggestions on conference content.
- **NYSLAA Conference Coordinator** – The person appointed by the Council to guide, oversee, and coordinate all the planning of the NYSLAA conference. S/he serves in an advisory capacity, providing templates and guidelines to the Conference Planning Committee, setting deadlines, and possibly producing the main documents for the conference. S/he works with the printer for the program and brochure and the company that provides the conference bags, shirts, etc.
- **Conference Planning Committee** – A group of people from the area where the conference will be held. They hold a majority of the responsibility for shaping the conference and planning the program. They work closely with the Coordinator to make sure all expenditures are approved by the Council prior to committing any financial resources. The Committee should broadly represent your conference target audience, if possible, by having representatives from public, academic, and special libraries. If just one library type is hosting the conference, members from the other types of libraries should be asked to join the committee.
- **Conference Chair** – The Conference Planning Committee picks a person to head the group. The Chair is the liaison to the Coordinator and keeps the committee on track for meeting deadlines and keeping within the budget.

Planning, organizing and conducting a training conference can be rewarding and challenging. To develop a successful conference, you must employ the talents, cooperation, coordination, and participation of many individuals. For this reason, it is best to establish a **Conference Planning Committee** very early in the planning process. There is no one formula for success. A committee should be used to distribute the workload among many people, but the greatest benefit of using a committee is that it ensures that the conference represents the thinking and planning of more than one individual or library type.

Be careful--forming large committees can lead to problems. Getting everyone together for meetings is the most obvious difficulty and agreeing on issues can be another serious problem. Situations will occur where complete agreement cannot be expected. The point here is not to create problems by assembling a committee that is so large that reaching agreement is difficult.

Planning a Conference I

Choosing Your Committee

Look for persons to serve on your committee who:

- Are respected by others in the library community.
- Possess good organizational, negotiation, or communication skills.
- Are dependable and able to accept responsibility.
- Work well with others.
- Can make decisions.
- Can abide by the decision of the majority.

Once you begin to deal with various issues, the Committee's role will become more defined. On some issues the Committee may be asked to simply advise, make recommendations, or give its stamp of approval. On other issues, the Committee may need to make a final decision. There may be instances in which the Coordinator or Chair will use the committee as a sounding board.

The Chair should be sure the Committee knows what is expected of them and understands the relationship between the Committee, Coordinator, and Council by preparing a list of conference issues to be addressed and the function of each of the conference groups. The following list of duties/responsibilities is an *example*:

Duties/Responsibilities Sample

	Committee	Coordinator	Council
Site Selection:	Select Options	Advise	Approve
Workshop Topics:	Submit List	Advise	Approve
Workshop Speakers:	Submit List	Advise	Approve
Fundraisers:	Select	Advise	Approve

Continue to add issues as appropriate and necessary for your conference working with the Conference Coordinator to identify the issues and decide the duties.

Other Committee issues that the Chair and Coordinator need to address are:

- Will committee members be compensated for their time or reimbursed for meeting expenses by their institutions? (They will **not** be reimbursed by NYSLAA)
- How often will the committee meet?
- Will the Committee members be allowed work time to focus on conference planning?

It is important to know the answers to these questions early in the planning stages, especially when the committee consists of representatives from various library types.

Planning a Conference I

The Conference Chair

One of the first responsibilities of the Conference Planning Committee should be to select one of its members to serve as the Conference Chair. Having a competent person serve as chair is vital to the success of the conference because the Chair is involved in every aspect of conference planning and execution. You need someone with all the qualities stated earlier for Committee members plus a few more.

Look for a person who:

- Possesses good organizational skills.
- Is a good communicator.
- Has an eye for details.
- Can function well even if things get a little stressful.
- Possesses a good sense of humor as it can be a big plus.

Conference *planning* requires a great deal of time devoted to administrative and clerical work. Conference *execution* requires a lot of management, especially for larger conferences with 200 participants or more.

In some situations, the Conference Chair steps up first to host the conference. In this case, the Chair ends up selecting his/her own committee after the Council approves the conference site. Refer back to page two for guidance in selecting your committee.

Chair and Conference Planning Committee Functions

- Submit expected expenses to the Coordinator to prepare a conference budget.
- Set the schedule for completing tasks leading to the conference.
- Recommend and correspond with speakers/entertainers/exhibitors.
- Select topics/speakers for workshops.
- Prepare session descriptions.
- Set the flow of the conference and plan the program.
- Schedule and organize meetings.
- Send workshop descriptions/speaker bios by date established by the Coordinator.
- Order room setups for all workshops/sessions including AV.
- Handle logistics for VIPs (keynote, speakers, etc.).
- Assist the Coordinator in managing conference crises.
- Ensure bills are submitted to the Conference Coordinator for payment.

Planning a Conference I

Coordinator/Council Functions

- Conduct site visits.
- Negotiate contracts with hotels/meeting facilities.
- Develop conference notices, brochures, and registration forms.
- Communicate with conference registrants.
- Order conference supplies through established suppliers (shirts, bags, etc.).
- Prepare name badges, signs, banners, evaluations and the program book.
- Recruit and train conference staff/volunteers for registration and onsite help.
- Process conference registrations and oversee the onsite registration table.

The work of the Committee is a part-time responsibility, but for the Coordinator it can become a sole assignment!

Why Hold a Conference?

There are many good reasons to hold a conference. The purpose of the conference should be clearly established before the planning process begins. Generally, a conference is initiated through the following steps:

1) A library or library group volunteers *or* is called on to serve as a conference host.
2) A conference planning committee is appointed.
3) A conference chair is selected or appointed.
4) Determine the theme of the conference.

The Conference Planning Committee plays an important role by establishing the purpose/theme of the conference. Remember, your Planning Committee should be a broad representation of your target audience; don't underestimate the committee's value. Following are tips to guide you in developing a statement of the conference's purpose:

- **Establish a clear and emphatic purpose**. Some conferences fail simply because their purpose was not fully addressed.
- **Know what others are doing**. For example, if your conference will address a specific library topic, find out what the current trend is on that topic for libraries.
- **Learn the needs of your target audience**. Don't tell your target audience what information and training they need--let them tell you.

Who is the Target Audience?

It is important that the conference's purpose/theme and participants are well matched. The conference is for library assistants, so the goal should be to determine what conference purpose/theme will encourage them to attend and to ensure that conference workshops will address their needs.

Members of different library types or departments will have different training/educational needs. Know the audience you want to attract and understand their conference needs.

Planning a Conference I

Number of Participants

Some conference planners believe that a large number of participants ensures a better conference, but this is not necessarily true. The number of attendees must relate to other factors. Consider the following:

- **Target audience**. Don't plan on a conference of 500 when your pool of expected attendees numbers only 200.
- **Conference budget**. The financial resources available to spend on the conference will directly affect your program and may also affect the number of attendees.
- **Number of meeting rooms and room capacities**. The number of available meeting rooms can limit the number of concurrent workshops you can hold. Total seating capacity limits the number of attendees.
- **Accommodations**. The number of sleeping rooms is extremely important when an overnight stay is required for conference attendees.
- **Number of conference staff and volunteers**. Although staffing is usually determined by the number of attendees, this may be a factor if you have a limited number of conference staff available.
- **Size of ballroom or banquet facility**. For Town Meetings and for meals, the number of attendees can be limited by banquet room capacity.

Conference Dates

Conference planners should consider a timetable of at least 12 months to organize a conference. This should provide all the time you will need to handle the planning and administrative tasks. Of course, these tasks can usually be accomplished in less time, but the earlier you start, the easier your job will be.

When reviewing conference dates, consider that all hotels and meeting facilities have **peak** periods of high demand and **value** periods of low demand. The three fundamental elements involved in site selection are location, dates, and price.

Before you contact convention bureaus or meeting facilities with your **request for bids**, establish first and second **date preferences**. *Note*: The NYSLAA conference traditionally falls Wednesday-Friday, the first or second week of June.

These factors have an impact on attendance by speakers and conferees. They also may affect the hotel rates and your ability to negotiate certain items in your contract.

Planning a Conference I

Conference Budget

A conference budget should be prepared through a thoughtful process involving the Planning Committee, the Chair, the Coordinator and the Council. While the Planning Committee and Chair are making conference plans, they need to project all conference expenditures including meals, speaker fees, entertainment, room fees, bags/shirts and any other expected expenses they will incur; i.e., decorations, AV needs for workshops, etc. The Committee needs to understand the budget implications of its planning actions. The registration fee is based on these figures. If expenses are not submitted and accounted for prior to setting the registration fee, it will be difficult to obtain reimbursement for these expenditures.

The Coordinator will control the budget--that is, **all** budget items should be developed in conjunction with the Coordinator. The Council **must** pre-approve payment of conference expenses. The conference budget, including **all** expected expenditures for the conference, needs to be given to the Coordinator by January 15th to be approved by the Council. From these figures the registration fee is set.

In preparing the budget, conference planners need to consider which hotel costs will be paid by the conference **master bill** and which will be paid by persons attending the conference. Be sure to clearly communicate your plans to the hotel by providing a list of names of speakers and attendees that will be on the master bill.

II. Site Selection

Give Yourself Time

Another important decision you will need to make early in the conference planning process is site selection. **Early** is the key word here. The more time you have to choose a site, the greater your options will be. The more options you have, the greater your ability will be to obtain your preferred dates and negotiate with hotels and meeting facilities.

How Early Should You Start Scouting Conference Sites?

That depends on the size of the conference and the number of facilities available to accommodate you in the locale you desire. In Section I, 12 months was the suggested time frame in which to organize a conference. In terms of site selection, 18 months before the proposed date is not too early to start the selection process, especially if you want a site during its peak season.

Matching Conferences with Facilities

Matching your conference with the right type of facility can make a good conference a great conference. This requires some serious planning. You need to consider what type of facility can best serve your needs. The following is a list of facility types and the advantages of each:

- A **downtown hotel** in a large city with downtown attractions is a good choice when attendees are in meetings most of the day but have large blocks of personal time around lunch or in the evening.
- An **airport hotel** or **airport meeting facility** works great when you have conferees flying in for a one- or two-day conference.
- **Suburban hotels** usually provide convenient parking at no charge and are often situated near local attractions. These hotels work especially well when many conferees will be driving to the meeting.
- A **conference center** adds the convenience of having all of the training, and sometimes overnight rooms, in one location.
- **College campuses** have many rooms for workshops and many offer the advantage of having computer classrooms for hands-on workshops. Most have residence halls or dorms for overnight stays. (A list of area hotels should be provided as an alternative for accommodations.)

Any of these types of facilities can help make your conference a success if it is a good match for your meeting. When you know your audience, understand the purpose of your conference, and have planned an appropriate conference program, choosing the proper type of facility will be easy. When hosting in a smaller town, there may only be one venue that will be able to accommodate the size of the NYSLAA conference.

Planning a Conference II

Conference History Data and Fact Sheets

Conferences can bring economic benefits to the host city or community. For this reason, you may find convention bureaus, hotels, and convention centers aggressively competing for your conference business. As you compare facilities and evaluate which ones are best for you, be aware that representatives of hotels and meeting facilities are evaluating your conference and its economic impact as well. These representatives must decide if doing business with NYSLAA will be a good business decision.

Knowing previous attendance and meeting requirements is an asset. With this knowledge you can accurately anticipate your current meeting needs, establish a dollar value for your conference business, and prepare for the contract negotiations that will follow.

Although additional information may be necessary, convention bureaus, hotels, and meeting facilities may want to know the following conference history data:

- Conference dates and locations.
- Number of sleeping rooms and suites blocked at each hotel.
- Number of single and double occupancies.
- Number of rooms picked up (include pre- and post-conference dates).
- If a hospitality suite was used.
- Number of meeting rooms used per day/number of attendees per room.
- Types of functions held each day.
- Food and beverage information (guaranteed and consumed).
- Arrival and departure patterns.
- Activities planned away from conference site (tours, dinners, mixers, etc.).

This list illustrates why good record keeping is a vital element of conference planning. This information provides a solid foundation to base decisions for future conferences. Using the data on past conferences as a guideline, draw up a fact sheet of anticipated meeting requirements. The fact sheet should include:

- Preferred conference dates (first and second choices).
- Number of sleeping rooms needed (include multiple occupancy).
- Meeting room requirements (number, size, and duration of use).
- Food and beverage requirements.
- Who the facility should negotiate the contract with (know the Coordinator's address, phone and email).
- When decisions will be reached (indicate whether site visits are required).
- Conference history data.

Fact sheets are incredible time savers; without them, you can spend hours on the phone reciting the same information to different convention bureaus, hotel sales representatives, or campus conference event representatives.

Planning a Conference II

Convention and Visitors Bureaus (CVB)

CVB's can be a great resource. All the information you need about the city or region under consideration can be obtained through the local CVB. If you need information about hotels and meeting facilities, airline services, public safety, restaurants, attractions, nightlife, and other available activities, the CVB can obtain this information for you. Commonly, the CVB will provide a packet of information that answers conference planners' most frequently asked questions and, at the same time, highlights the features of its area of service. Remember, the CVB is your liaison to businesses, local officials, and the community. It can be a valuable partner in conference planning and execution.

Site Inspections

The Coordinator, Chair, and Conference Planning Committee should make the initial selection process by picking what they feel is the best site to hold the conference. Then a visit to the property under consideration by the members of the Conference Planning Committee, the Coordinator, and the Council needs to take place to approve the site. After the conference site is selected, working with the site will be the responsibility of the Coordinator.

Site inspections can build the relationship and open communication between the Coordinator and the staff of the hotel or meeting facility. Keeping the Coordinator involved from the start of dialogue with facility staff also increases the likelihood that the meeting as planned will work at the facility and decreases the likelihood of miscommunication or misunderstandings.

Hotel Site Inspections

Site inspections offer the opportunity to walk through a property and examine it for cleanliness and upkeep, but there is so much more that can be accomplished. This is your chance to meet the property managers, see the staff in action, and get a feel for the ambiance of the facility. You will want to measure those special qualities that cannot be shown on floor plans or brochures. Are rooms bright or dim, noisy or quiet, warm or cold, fresh smelling or musty? Is the staff polite, friendly, well-groomed and courteous? Can you move easily and comfortably from room to room? These are the kinds of characteristics that can be measured only by a site inspection.

As you begin your tour of a property, you can expect to receive a packet from your sales representative containing details such as room capacities; the number of singles, doubles, and suites; the property's floor plan; and banquet options and menus. In addition to this useful information, prepare your own checklist of items you want to review and questions you need to have answered. Then, as you walk through a property, check off each item or take notes on what you observe and what has been discussed with staff from the hotel or meeting center.

Planning a Conference II

Campus Site Inspections

It is important to do a site visit if you are holding the conference in a campus setting. You will need to be sure the attendees can easily find their way around the campus to get from the dorms to the where the meals will be served and then on to all the workshop space. Everything should be in easy walking distance and the terrain relatively easy to negotiate as you will have to consider the variety of needs your attendees will have. Also consider if the workshop space, dorms or banquet hall are air conditioned. (Not a must, but something to consider.)

A checklist will be important for a campus setting too. As you walk through campus, check off each item or take notes on what you observe and what has been discussed with staff from the campus.

Checklists of Site Visits are Important

These checklists and written records become very important when several sites are visited. It may seem easy to remember the differences between properties at first, but the collected data can be overwhelming by the end of the day.

Stay focused on the purpose of your site visit. Fully utilize the short time you have at each property with its representative. Observe, take notes, and above all, **ask questions!** There are *no* stupid questions and chances are good that what you ask has been asked before.

III. Negotiating Agreements and Contracts

NYSLAA is the entity that enters into a formal contract agreement with the hotel or campus. NYSLAA is listed on the contract, which can be signed by the Treasurer or the Coordinator as a NYSLAA representative, **after** the contract has been approved by the Council. Once an agreement is signed, it may be binding even if it was signed by a *representative* that did not have the authority to sign the contract. This is why the contract **must** be approved by the Council prior to it being signed.

Negotiations frequently involve a series of inquiries and conversations between the facility and the Chair or Coordinator before an agreement can be reached. This process may take several days or several weeks. The bottom line in negotiating is that the facility expects to make a profit on your business and, at the same time, you need to pay a reasonable price for the services you are buying. Comparative shopping will help.

What is negotiable? Everything--but you must negotiate from a position of knowledge.

- Know what you need from the facility.
- Know what a competitive price is for what you want.
- Know what your budget limitations are.

Power Items

Conference planners use a checklist to tally the items that make a potential site attractive. Hotels make the same type of list for potential clients. Be aware of the items that make your conference attractive business.

- **Location.** Some cities have a reputation as major convention sites. The attractions of the city are so great that hotels and meeting facilities command higher rates. Smaller cities are often attractive sites and offer lower rates.
- **Arrival/departure days.** Your arrival/departure pattern can mean a lower rate. Wednesdays-Fridays are arrival/departure patterns preferred by most hotels.
- **Food and beverage use.** Groups that use a hotel's food and beverage service are much more attractive than those that do not. The more services you use, the more attractive your group is.
- **Sleeping rooms/meeting rooms ratio.** A group that uses all of the hotel's sleeping rooms usually will be offered all of a hotel's meeting rooms. Using fifty percent of a hotel's sleeping rooms may mean that all of the hotel's meeting space may not be available to you. Make sure the facility has enough sleeping rooms and concurrent workshop rooms to hold the conference.

A review of these items will help you determine the value of your conference, which is the key factor in negotiating an agreement. Each hotel, college or meeting facility has its own contract requirements, and clients have certain requirements, too. However, most elements of the contract are standard. To help you fashion an agreement that is suitable to your conference, the following are commonly used in hotel contracts and agreements.

Planning a Conference III

Definitions

Some commonly used terms you should know are:

- **Room block** The number and type of overnight rooms the hotel will hold.
- **Room pick-up** The number of rooms actually used by the client.
- **Breakouts** Number of rooms used for concurrent meeting sessions.
- **Group rates** Discounted room prices given for bringing in large groups.

Guest Room Commitment

- **Room block** specifies the number of hotel guest rooms reserved for your group.
- **Cutoff date** indicates the date up to which the hotel will hold the room block at the group rate. Sometimes, the hotel will continue to accept reservations at the group rate after the cutoff date on a space available basis; however, it is a negotiable point and it should be clarified in the contract.
- **Check-in** and **check-out** times should be clarified in the contract.
- **Incidental and personal charges** are the responsibility of each guest except as otherwise directed in writing by the group. Be sure to identify key personnel such as speakers, staff, and VIPs whose charges may go on the master account.
- **Complimentary rooms** usually are offered by the hotel on a "one for 40 or 50" basis; i.e., you receive one room free after booking the required amount. Use these free rooms for your VIPs/speakers if needed.
- **Walking provision** refers to the hotel's responsibility in the event that it fails to honor the reservation of any confirmed guest. It is not unreasonable for a group to demand free lodging at an equivalent or better hotel plus transportation for "bumped" attendees at the expense of the hotel. Other arrangements may be acceptable, such as free lodging one night and a return to the hotel on the second night.

Rates, Fees, and Charges

- **Guest room rates** are usually **confirmed** one year in advance.
- **Pre-conference and post-conference rates** indicate how many days before and after the conference the group rate applies.
- **Incidental charges** indicate charges and fees for services such as parking, shuttles, etc. Be sure that these charges do not exceed the "norm." The contract should specify current charges for fees that are paid by guests.

Planning a Conference III

Billing and Credit Arrangements

- Hotels establish a **master account** for a group based on the information on the contract. Specific individuals are authorized to make charges to the master account (usually the Conference Chair or Conference Coordinator).
- The **payment date** provision indicates the timeframe, usually 30 days after receipt of invoice, in which the client shall pay for undisputed charges to the master account. When discrepancies or errors occur, the hotel usually rebills the client and payment is made within another 30-day period.
- **Payment of master account** at check-out can provide discounts off your final bill. Inquire about this option.

Function Information

- A **function information sheet** or **function space assignment sheet** will indicate a hotel's understanding of your meeting requirements. Hotels can only guarantee space for what you agree to, so be sure all your meeting requirements are clear.
- Meeting **room rental charges** are negotiable. Charges, if any, should be spelled out in the original agreement. Specify room setup charges, if any apply.
- **Complimentary space** and **setup** details are important to specify in the contract to avoid any unexpected charges for room use or setups requested by the group. Complimentary pads, pencils, water, microphones, easels, etc., should be included here. Any complimentary items should be noted in the contract.
- Specify in the contract all **conference services** provided by the hotel for which there is a cost to the group; i.e., exhibit table setups, resetting rooms, faxes, etc.
- The hotel's **sign policy** specifies what is and is not permitted and should be noted in the contract. Usually hotels permit an easel or a special sign holder outside each function room and directional signs at stairways, elevators, and in the lobby.
- The contract should state that the hotel shall not reassign any function space committed to the group without the group's prior approval.
- **Final figures** reflecting expected attendance and functions are required by hotels, usually one to two months in advance of the conference. Thereafter, hotels may release space not committed to use by the group after a notice of intent to release space is provided to the group.

Planning a Conference III

Exhibit Requirements (Optional)

Not all conferences require exhibit space. If your meeting includes an exposition, the following items should be included in your agreement:

- **Assigned exhibit space.** Include location and any limits on size, weight, types, or number of exhibits. It's an advantage to have an exhibit area in which food is served or sold and to have open space between your exhibit and registration area and that of other hotel patrons.
- **Charges for exhibit space.** Exhibit space may be complimentary; it's negotiable.
- **Setup and dismantle dates.** Indicate the times your group will have access to the space for setup and the date and time for dismantling exhibits. Clearly state the times the exhibit areas may be open and when the area needs to be cleared.
- **Storage and security.** Include arrangements for storage, storage limitations, access to the storage area and security arrangements.
- **Materials.** Include specifications for who is responsible for getting materials to the exhibit space.

Meeting Coordinators

The hotel should designate a specific person or persons who will handle meeting room setups, menu selections, audiovisual needs, sleeping room requirements and all other aspects of the group's program. The agreement should have a date by which the designated person(s) will contact the group to review all the program needs.

Food and Beverage

- **Specific functions** should be listed, such as the number of breakfasts, lunches, dinners, coffee breaks, mixers, etc. that you plan to hold; the day and date for each function; and the estimated attendance for each function. Hotel policies will determine how many days in advance the group must give a minimum guarantee of the number of people who will attend each function. Hotels usually set for up to five percent over the guaranteed minimum.
- **Confirmed prices** for all catered meals should be listed.
- State the **date** by which the group must **specify choice** of menus, beverages, etc. and confirmed prices.
- **Gratuities/service charges** required for all food and beverage should be stated.
- **Federal, state, and local taxes** should be clearly stated.

Insurance

The facility and NYSLAA should agree that each will carry adequate liability and other insurance to protect against any claims arising from any activities conducted in the facility during the conference. Usually the hotel’s insurance is adequate but if using a campus setting, additional insurance may need to be purchased.

Planning a Conference III

Cancellation Policy

All agreements should carry a cancellation policy for the protection of both parties. The following are suggested elements of a cancellation policy:

- **Rights to Cancellation.**
  - **Generally.** The agreement will bind each party, and there shall be no right of termination or right to cancel obligations under this agreement except as otherwise provided herein.
  - **Uncontrollable events.** The performance of this agreement by either party is subject to acts of God, war, government regulation, disaster, strikes, civil disorder, curtailment of transportation facilities, or other emergency making it inadvisable, illegal, or impossible to perform their obligations under this agreement. Either party may cancel this agreement for any one or more of such reasons upon written notice to the other party.
  - **Construction/renovation.** In the event that the hotel will be undergoing any construction or renovation during the conference, the hotel shall promptly notify the group, and the group shall have the right to cancel this agreement without liability upon written notice to the hotel, if, in the group's reasonable judgment, such construction or renovation may unreasonably affect the use of the facilities or the quality of service to be provided under this agreement.
  - **Without liability.** The phrase "without liability" wherever used in this agreement shall be deemed to include a refund by the hotel of all deposits and prepayments made by the group.
- **Cancellation Fee.** In the event of any cancellation of this contract by the group not otherwise permitted under this agreement, the group may have to pay a cancellation fee to the hotel. The fee is based on the number of days prior to arrival you cancel and the number of rooms you are canceling. Typical fees charged are based according to the following schedule:

0 - 90 days	100 percent
91-180 days	75 percent
181-270 days	50 percent
271-364 days	25 percent

  (The actual schedule may vary based on the size of the group or the hotel. If the hotel is able to replace this canceled business, the collected amount should be reimbursed to the group without interest. (*Clarify this with venue*.)
- **Failure by the Hotel.** Failure by the hotel to provide the space and/or services as agreed shall render the hotel liable to the group for all direct, indirect, and consequential damages, expenses, attorney fees, and costs incurred by the group on account of such failure. Exercise by the group of any of its rights of cancellation of this agreement shall not waive or otherwise affect this provision. (*Clarify this with venue*.)

IV. Planning the Program

In planning the conference program, you can create an almost infinite number of possible designs. This is an important process because even high-quality sessions can lose their value if the program is not properly planned. The program planning process should begin after the following steps have been completed:

- The conference purpose has been defined.
- The audience profile has been determined.
- The number of participants has been estimated.

A well-planned program interrelates the above three factors with conference **events, presentation methods**, and event **scheduling**. Your mission here is to design the best combination of events, presentation methods, and scheduling to serve your conference. Your program should not be set so rigidly that it does not allow some flexibility.

Events

- **Registration.** All conferences need a registration period even if all conferees are pre-registered. Attendees must check-in, pick up conference materials, and receive conference information. Registration is open on Wednesday afternoon prior to the mixer and on Thursday and Friday mornings during breakfast.
- **Opening Session.** Our conference's opening session features a welcome by the Conference Chair and sometimes a library director or local official. The welcome is followed by a Town Meeting with an agenda. This includes Regional reports and time for attendees to direct questions and comments to the Executive Council.
- **Concurrent Workshops.** When two or more sessions are held at the same time, they are known as concurrent sessions or workshops. These sessions may be presented so that conferees have a choice of which sessions to attend. Various presentation methods can be used, some of which are described on the next page.
- **Closing Session.** Conferences that end without a closing session send conferees away feeling a little empty. Closing sessions should uplift conferees and send them away feeling informed, renewed, and energized. Our closing session consists of a luncheon, a keynote speaker, an awards ceremony, and a basket raffle.
- **Banquets.** For purposes of this section, banquets include breakfasts, luncheons, dinners or other food functions at which all conferees will gather together. These functions should have a purpose. Consider the following possible purposes:
  - To offer networking and nourishment.
  - To set the mood for the following event.
  - To relax the group after a particularly taxing session or day.
  - To make awards, presentations, or announcements.
  - To provide entertainment.
  - To present guest speakers.
  - To offer a transitional period to bridge two segments of the conference.

Planning a Conference IV

- **Mixers.** Mixers can vary greatly in their degree of formality. They provide a period for people to talk and to meet each other and the NYSLAA officers. Mixers can be used to entertain and to provide networking time.
- **Tours.** These trips are usually scheduled for entertainment purposes or to provide a convenient way of visiting local attractions. However, you may schedule a trip as part of conference business; i.e., history workshop walking tour, library tours.
- **Free time.** Free time is simply any break period of more than thirty minutes when conferees have time to do what they want. Free time allows conferees to network, purchase conference items, shop and support the local economy, or check-out.

Presentation Methods

- **Speaker.** Consists of one or two speakers making a formal presentation. It may or may not include questions and answer time.
- **Hands-on.** Consists of enough materials or computers for the entire class to participate. Can be a computer class (for example, Excel, web design, etc.) book repair, etc.
- **Roundtable.** Consists of small groups. Each group member is asked to contribute his or her ideas or thoughts. Roundtables can be used to offer ideas regarding how to address an issue in the future, or brainstorm on common problems. An *excellent leader* is essential for roundtables to be successful.
- **Panel.** This involves a group that makes an orderly presentation on an assigned topic. The audience may or may not ask questions or participate in the discussion.

Scheduling

There are certain things you can do in terms of scheduling that will help produce a better conference. Most are a matter of common sense. But don't get overly concerned if certain scheduling options are unavailable. Here are some tips on effective scheduling.

- **When overnight accommodations are required, schedule registration periods and events after hotel check-in is available and before check-out is required.** When this is not practical, be sure to arrange for safe storage of luggage and schedule free time for check-out.
- **When a conference lasts longer than a day, schedule free time.** A conference day is longer than a normal work day and sometimes more draining.
- **Schedule sessions with stimulating presentation methods after lunch.** Energy levels are lowest after lunch; stimulating sessions prevent sluggishness.
- **Schedule breaks in between sessions.** This has been mentioned before but is worth mentioning again.
- **When conferees are "on their own" for lunch, provide information about restaurants, prices, and service time.** Your conferees will appreciate this and it will help to keep your conference on schedule.
- **Large groups need more time for networking than smaller groups.** Allow for adequate networking time in your schedule so participants can learn from each other and from conference staff.

V. Speakers and Presenters

Methods for Finding Speakers

The term speaker refers to a person who makes a presentation at a general session, a workshop, or the person delivering the keynote address. Few things can do more damage to a beautifully conceived conference than inappropriate topics or incompetent speakers. Usually your speaker needs will depend on the topics to be addressed, but sometimes this may get reversed. If a speaker is selected because of his or her reputation for making dynamic presentations and the topic is determined solely by the speaker's preference, this can lead to an unpleasant surprise when the topic is out of sync with the purpose of the conference. One way to avoid this problem with speaker topics is careful planning by the Conference Planning Committee and the Conference Coordinator. If the people responsible for the conference have done their homework, they will know what topics they want to cover and their job will be narrowed to searching for speakers with expertise on chosen topics. The Planning Committee may choose to establish a Workshop Subcommittee. This Subcommittee would be responsible for finding speakers and topics. *All workshops need to be approved by EC prior to contracts being sent to speakers.*

Searching for Speakers

Where do you find good speakers? A good place to start is to talk with co-workers about librarians and other local presenters they have heard before. Here are some other sources for speakers:

- National, state or local organizations, associations and colleges.
- Local library associations and councils.
- Speakers and attendees from your previous conferences.
- Speakers from conferences sponsored by your colleagues. Create a file of brochures publicizing other related conferences.

Once you've found prospective speakers, you can contact them without presenting a firm invitation by phone. Tell the prospect about the conference and that you are considering a session on whatever the topic may be. Give the date and approximate time of the session, if possible, and a description of the audience. (*Make sure they understand we are library assistants and **not** librarians.*) Tell the prospect how long the presentation would be if you included the topic in your program. Most speakers must be free to put on the conference for the nominal fee we charge for registration. If a speaker needs expenses covered or requests an honorarium, inform them that you will discuss this with the committee to see if any expenses could be covered. If the prospect is interested and available, neither one of you are locked in at this point.

Talk a little longer. Inquire about other presentations he or she has given. If you can identify the conference sponsor or coordinator of these previous presentations, call him or her and ask for opinions.

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Speaker Contracts

When you have made a final choice on which speakers you would like to invite, contact each speaker again. If the speaker agrees to participate in your conference, follow up with a letter and contract. A sample contract is included in the Appendix.

The follow-up letter should include:

- Date, location and address of the conference.
- Purpose of the conference.
- Size of the conference and workshops.
- General profile of attendees. Make sure they know that they will be addressing **library assistants** and who we are.
- Topic of the presentation and length of time of the session.
- Layout of the workshop room and do they have a preference? (classroom, theater, etc.). See Appendix.
- Honorarium or expenses to be paid.
- Details regarding travel, accommodations, and where and when your conference representative will greet the speaker.
- A deadline for requesting audiovisual aids, if unknown at the time of the invitation, or a confirmation of what will be provided.
- A request for a picture or biographical material as needed.

Include any promotional material you may have on the conference.

Two weeks before the conference, send each speaker a reminder and include:

- Any program changes that could affect the speaker.
- Any information the speaker might find valuable.
- What accommodations you have arranged for the speaker.
- Confirmation of the time and place where the speaker should arrive.
- Your current telephone number, the date you will arrive at the venue and a number at which you can be reached onsite.
- The names of other guests and any appropriate background if the speaker will be seated at the head table.

The search for speakers and the subsequent selection and invitation may be done by anyone who has a role in planning and organizing the conference. Whatever arrangement works best for you is the one to use. However, some formal control and status record should be the responsibility of one individual. In most cases, this responsibility will fall to the Conference Chair. The development of a speaker status control sheet for each speaker can be a valuable tracking tool. A sample tracking chart can be found in the Appendix.

VI. Executing the Conference Plan

Execution of the conference plan begins with registration and ends with evaluation; in between is the process of conducting the conference. Up to this point, you have been planning and preparing for the conference. Now is the time it all pays off. But beware--many months of solid planning and preparation can be in vain if they are followed by poor execution.

Registration

Registration involves an exchange of information, and sometimes money, between NYSLAA and attendees. It should be a fast, simple and painless process. This is true for **advance registration** as well as **onsite check-in.**

Onsite check-in leaves a lasting impression and can set the tone for the conference.

Onsite Check-In (Everyone has already registered; this is just check-in.)

- Make a checklist for necessary onsite supplies and equipment, such as:
  (The Membership Secretary and/or the Conference Chair work on supplies.)
  - Tacks, pins, tape (cellophane and duct)
  - Stapler, staples and staple removers
  - Scissors
  - Glue
  - Paper clips
  - Pens/pencils
  - Paper
  - Receipt forms (in duplicate)
  - Laptop computer (optional)
  - Calculator
  - Extra tickets, blank name badges, ribbons, and programs

- Inspect the registration area. Give yourself time to adjust to the unexpected.
- Check the registration area for proper lighting and ventilation.
- Be sure the registration area creates a flow of traffic. You want people to stop, check-in, pick up their materials, and move on.
- For large groups, create lines within each area--alphabetically.
- Make conference check-in/registration one stop. Meal tickets, name badges, programs, etc. should be preassembled in one packet. Send conferees to the next area to look at the baskets for the raffle and to purchase raffle tickets.
- Make directional signs legible and place them well.
- Don't skimp on personnel. One registrar for every 50 conferees in the registration area is an ideal ratio.

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- The Membership Secretary will meet with and train registration clerks prior to registration time and provide written instructions and responsibilities. Make sure volunteers know what information is needed and how to handle problems (should they occur), speakers arriving, and incoming money.
- Keep a "gofer" in the registration area.
- The Membership Secretary will establish policies for:
  - Refunds
  - Lost badges, tickets, programs, etc.
  - "Lost" registrations
  - Pre-registered conferees who still owe money
  - Handling money: collecting it and giving it to the proper person.
- Determine where registration supplies and equipment can be securely stored.
- Designate one person to be in charge of the registration area.
- Provide information and message centers close to registration area.

Using Signs

- Place signs at the doors of all workshops listing workshop number (if appropriate), workshop title, name of presenter and workshop time.
- Place directional signs in lobbies, at end of hallways, and at the top and bottom of staircases; getting lost in a meeting facility is frustrating.
- Designate a person or several people to be in charge of signs.

Following the Agenda

- Changes to the agenda are sometimes unavoidable. Adjust when you must.
- Stay on schedule even when the agenda has been changed. Make sure monitors, introducers and the person handling "housekeeping announcements" understand the importance of this.
- When possible, announce changes in the confirmation letter sent to conferees, at general sessions and workshops, and at the information center. Print and distribute flyers if the change warrants it.

Staffing

During the conference, the Conference Coordinator's and the Conference Chair's time is in great demand. They are busy with managing, overseeing, directing, deciding, greeting, meeting, and sometimes peacekeeping. An informed and trained staff of volunteers is necessary for a conference to run smoothly. Learn to delegate conference responsibilities and clearly communicate what needs to be accomplished. Here are some tips to follow:

- All staff should have a thorough knowledge of the conference program and the floor plan of the meeting facility.
- Utilize a staff of conference guides (volunteers) to direct traffic flow when necessary and to assist conferees in reaching their next destination. These volunteers are particularly helpful organizing tour groups, during breaks, and assisting transportation guidance to off-site venues.

- Assign **workshop monitors** for each workshop. Assignments ***may*** include:
  - Checking room setup and audiovisual requirements in advance.
  - Greeting presenter and attendees.
  - Making announcements, introducing and thanking presenter.
  - Distributing handouts.
  - Keeping workshops on schedule. Discreetly letting the speaker know from the back of the room when ten and five minutes remain in the session is one way to do this.
  - Assisting in taking attendance, if necessary.
  - Assisting in seating when the room gets crowded.
  - Meeting any other needs of the conferees.
  - Handing out workshop certificates at the end of the workshop.
- Set aside time for **training**.
- Assign an **Audiovisual Coordinator** to oversee audiovisual requirements. This coordinator's duties may include moving equipment between sessions from room to room, setting equipment in place, or working with contract audiovisual professionals as needed. (This may be the duty of the hotel or campus personnel, but someone on the committee should be sure the room set-ups are correct.)
- **Make all conference staff and volunteers feel important--they are!**

Evaluations

Evaluations can be a valuable tool in planning next year's conference. Many conferees want to express how they feel about something in which they have invested their time and often their money. Many speakers and presenters use the evaluations to refine their presentations. The most common method of evaluation is the use of an **evaluation form**. The form is designed as a questionnaire to gauge conferees' reactions to and thoughts of various components of the conference. Our form is now an **online evaluation**. This needs to be advertised heavily at the conference and on the listserv and Facebook after the conference.

Evaluating **every** element of the conference probably isn't worth the effort it would take to do so. In addition, there comes a point at which completing an evaluation form becomes burdensome to the respondent. Most planners want to know what major elements of the conference worked, what didn't work, and what can be refined for the future.

Consider evaluating the following elements:

- Conference site
- Workshop topics and general session topics
- Speakers and presenters
- Special events (tours, receptions, etc.)
- Conference registration process

The design of the evaluation form should facilitate a quick and easy response and at the same time allow space for a more detailed reply. The evaluation form is created by the Conference Coordinator who welcomes input from the Planning Committee and others.

Planning a Conference VII

Appendix 1: When Thinking About Hosting a Conference, Consider the Following:

- Hotel/dorm facilities
  - Can the venue house 150 people? We use around 70-85 hotel rooms for Wednesday and Thursday nights.
  - What is the group rate for overnight rooms?
  - Will the group rate apply for days prior to and after the conference?
  - How many can share a room?
  - Is there an extra fee for an extra person?
  - Do they have cots? How much for a cot?

- Are the dates we need available?
  - Usually we need Wednesday-Friday the first or second week of June.

- Banquet facilities
  - Can the venue feed 150 people in one room at one time?

- Workshop space
  - Can the venue provide 6 breakout workshop rooms concurrently?
  - Can the venue provide any hands-on computer workshops?
  - Does the workshop space have capabilities for PowerPoint presentations?

- How many do the rooms seat :
  - Classroom style?
  - Theatre style?

- Are the workshop rooms wired for internet?
  - Is there a cost involved?

- Can the venue provide pitchers of water and glasses in each workshop room?
  - Is there a cost?

- Is there a charge for meeting space?
  - If yes, what about if we cater with the venue?
  - (Note: Usually if we have them cater the meals, the meeting space is free.)

- What are the charges for AV equipment?
  - (Projectors needed for PowerPoint presentations, screens, flipcharts, chalkboards, etc.)
  - May we bring in our own AV equipment?

- Speakers
  - Can you find 24 speakers/topics for the workshops? (Most must be free.)
  - Can you find a keynote speaker who can address your theme? (For less than $1,500.)

Planning a Conference VII

- Is the workshop space separate from where we would have meals served?
  (Note: If we have to use the same space for meals and workshops, breakdown and set-up time could make our schedule difficult to maintain. The schedule may need to be adjusted and this possibility needs to be considered.)

- Does the banquet hall seat 125-150 without seating 10 at a table?

- Is there a podium with a microphone available for the Town Meeting and the keynote luncheon in the banquet room?

- Does the venue have a wireless microphone for the Town Meeting?

- Menu options.
  2 breakfasts
  2 lunches (or one lunch on your own if there are walkable possibilities)
  Are there vegetarian options available?
  Can special food needs be accommodated on an individual basis?

- Is transportation available to pick up attendees from the airport, bus, or train stations?
  Cost?

- Is there parking available?
  Cost?

- Fund Raising
  Think of ways to raise $2,000 or more during the year preceding June.
  (Note: Each year the hosts are asked to raise $2,000 by the end of the conference. Since the registration fee is established in January, prior to the conference, what you raise does not affect your conference. Thus, we start your conference off with the $2,000 raised by the prior conference and the $2,000 you raise gets passed onto the following conference. The lottery is an option. Remember that proceeds from the basket raffle and 50/50s at the conference count towards this amount.)

- Donations
  Library vendors and local businesses should be contacted for donations of money or gifts that could be used for door prizes or to be used in the baskets to be raffled at the conference.

Appendix 2: Sample Contract for Speakers

You may create a mail merge document if you want. << >> are merge field titles.
[ ] are items that need changing to reflect current conference information.

CONTRACT OF AGREEMENT
Annual NYSLAA Conference [year]
[City], New York

Agreement made this 15th day of January [year] between

«FirstName» «LastName»

and the New York State Library Assistants Association, c/o [workshop committee chair – name and work address].

It is mutually agreed between the parties as follows:

1. Workshop: **«Wkshoptitle»**

2. Date: **«Wkshopdate»**

3. Honorarium: Thank you for your generous support. [or $ agreed on]

4. All prior understandings and agreements between the parties are merged within this agreement, which alone fully and completely sets forth the understanding of the parties. This agreement may not be changed or terminated orally. No changes may be made except in writing and signed by both parties.

5. Should the need arise, we reserve the right to cancel this contract within 14 days of the conference start date, and we request 14 days notification of cancellation on the part of the presenter.

6. This contract shall not be binding unless signed by all parties below.

_____ _____

[Name] Date
Workshop Committee Chair [or Conference Chair]
[phone]
[email]

_____ _____

«FirstName» «LastName» (of speaker) Date

Appendix 3: Sample Request of Speaker's Needs

You may create a mail merge document if you want. << >> are merge field titles.
[ ] are items that need changing to reflect current conference information.

New York State Library Assistants' Association
[conf #] Annual Conference
[Place, City], NY

Speaker: **«FirstName» «LastName»**

Workshop: **«Wkshoptitle»**

Day/Time: **«Wkshopdate» / «Wkshoptime»**

Audiovisual needs: Speakers must provide their own laptop. (Apple users must supply adaptor.)

____ projector ____ flip chart/easel/markers

____ screen ____ other (please specify):

____ chalkboard/chalk _____

- Seating will be **theatre or classroom** style unless otherwise requested.
- Do you have any other needs or questions? Please let us know by [**January 14th**.]

  _____

  _____

- Please include me for Thursday lunch: (This is optional)
  Yes ____ No ____
- Please include me for Friday's lunch with keynote speaker: Yes ____ No ____
  If Yes, circle one: [Selection 1; Selection 2; Selection 3] (This is optional)
- Please include a one- or two-paragraph bio for our program.

Thank you and please return to [workshop chair] by [January 14th.]

Appendix 4: Sample Letter to Speakers

You may create a mail merge document if you want. << >> are merge field titles.
[ ] are items that need changing to reflect current conference information.

[use NYSLAA letter head]

[workshop chair
address
city, state, zip]

[date]

«FirstName» «LastName»
«Title»
«Company»
«Address1»
«Address2»
«City», «State» «PostalCode»

Dear **«FirstName»,**

This letter is to confirm your presentation entitled "**«Wkshoptitle»**" at the [conf. #] Annual New York State Library Assistants' Association Conference to be held June [date]. Thank you for participating in our program.

We have scheduled your workshop once in our program:

Date: **«Wkshopdate»**
Time: **«Wkshoptime»**
Place: [place], NY
Description: "**«Wkshopdescription»**"

This title and description will be used in our registration brochure. I have attached our standard contract. Will you please check it for accuracy and then sign and return one copy to me. If you have any questions about any information I've provided, including the title and description of your presentation, please contact me by January 15th. We will be printing our brochure at that time.

In April, I will contact you again to provide a brochure *(optional)* and solicit any requests from you for AV or handout needs. We would appreciate a short bio from you to include in our program as well.

We look forward to working with you to present an interesting and informative conference.

Sincerely,

[name]
Workshop Committee Chair

Appendix 5: Sample Follow-up Letter to Speakers (if needed)

You may create a mail merge document if you want. << >> are merge field titles.
[ ] are items that need changing to reflect current conference information.

[use NYSLAA letterhead]

[date]

«FirstName» «LastName»
«Title»
«Company»
«Address1»
«Address2»
«City», «State» «PostalCode»

Dear **«FirstName»**,

The Conference brochures have been mailed and the registrations are arriving. We are looking forward to your participation in the [conference #] Annual New York State Library Assistants' Conference in [place], June [ ].

We would appreciate a short biography from you to be included in our conference program booklet.
(*Note: If they did not supply one already*.)

To help us prepare for your presentation, I have enclosed a worksheet. Kindly complete it and return it to me with your bio by [March 14th] so we have it in time to include your bio the conference program.

A conference brochure is included for you. (*Optional*) Thank you for being a part of our conference. We are looking forward to it! If you have any questions, please feel free to contact me at the number below.

Sincerely,

[workshop chair
address
phone
email]

Appendix 6: Sample Chart to Track Speakers' Needs

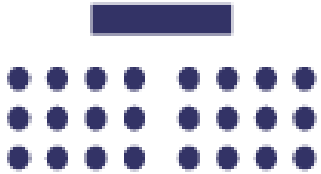
Obviously some of the headers will change from year to year.
This will help track your speakers' needs. Do some form of this chart to stay organized.

Chart to track speaker information and their needs.

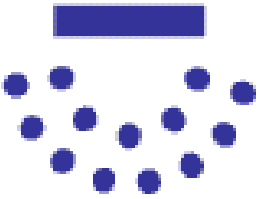
LastName	FirstName	Letter sent	Con-tract sent	Con-tract back	AV sent	AV needs	Bio recd	Break-Fast needed	Dinner needed	Lunch needed	Over-night	Regis-tration pd
Andrews	Joe	Y	Y	Y	Y	N	Y	N	Y	Y	N	N
Smith	Kathy	Y	Y	N	Y	Y	N	N	Y	N	Y	n/a

Appendix 7: Sample Room Set-ups for Workshops

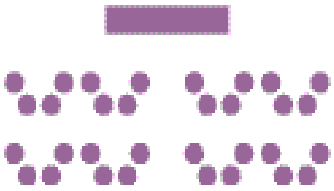
Classroom Style



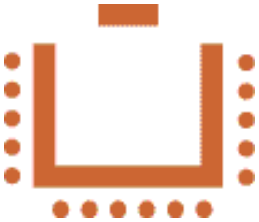
Theatre Style



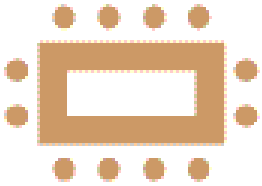
Large Semi-Circles



Small Semi-Circle



U-Shape Table



Conference Table

Conference Circle