

Society of
Southwest
Archivists

Planning an Annual Meeting

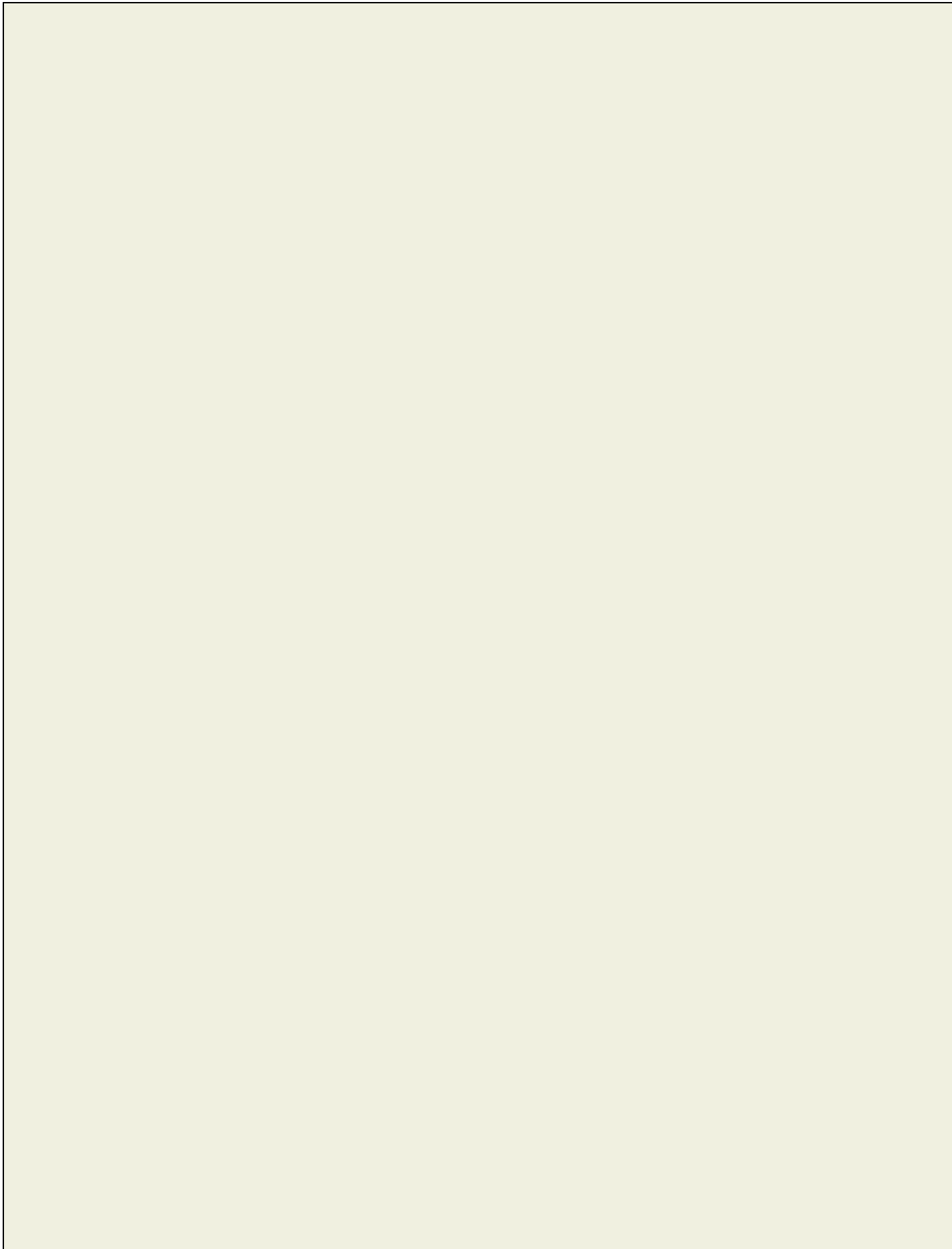


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Proposal

Before preparing your proposal, take a good look around your city and ask yourself some basic questions.

Consider what your city has to offer your guests before you create your proposal.

- Why do people come here?
- What kind of hotel and convention facilities are available?
- Is there a major airport nearby, and if not, what kind of transportation can be used?
- What activities could you schedule outside of the meeting?
- What kind of local arrangements support could you garner from the area?

What your proposal needs to include.

Your proposal will be a letter to the Annual Meeting Site Selection Committee Chair stating your desire to host an Annual Meeting and the advantages of having the meeting at your location. You will need to define the resources available to support the meeting: the potential members of the local arrangements committee, available hotel and convention facilities, and points of interest.

When you learn that you have been selected to host the Annual Meeting, begin preparations, no matter how far in advance. Many hotels will be able to provide you with convention rates and lock in a discounted rate up to two years in advance.

Previous proposal letter for you to use as a guide.

I would like the Society of Southwest Archivists to consider San Antonio, Texas for the site of its annual meeting in 2004. This letter serves as a proposal for the San Antonio Regional Archivists to sponsor the meeting.

I would be happy to serve as chair of the Local Arrangements Committee, drawing upon members from SARA to help me and to serve in various other capacities. San Antonio offers a wide variety of hotels and locations — the River Walk, the Medical Center, adjacent to the 1604 UTSA campus — to serve as conference headquarters. The committee will immediately begin to look at locations and costs, as soon as San Antonio is selected as the site.

Presently, San Antonio is served by all major airlines and a shuttle service runs from the airport to most hotels. San Antonio caters to a large group of tourists, and treats them well. There are numerous libraries, special collections, museums and historical attractions to draw the local arrangements committee from, to serve as hosts of receptions and tours, and to offer entertainment during and after the conference to attendees and their guests. The River Walk, the Alamo, and the Missions are just a few attractions that readily come to mind that could serve as destinations for tours.

San Antonio has not hosted a conference in a while, and we are looking forward to this opportunity. Our proximity to Austin would allow a number of archival students the ability to attend the conference but still enable them to go home at night. San Antonio is a tourist destination and so I think it would draw a good crowd. I feel positive the Local Arrangements committee can find reasonably priced accommodations, offer interesting entertainment, and provide access to an umber of historical settings. If you have questions, please feel free to call me.

Local Arrangements Committee

After being chosen to host an annual meeting, begin putting together the members of your LAC. Any current member of SSA in your area representing a variety of archives and repositories may serve on the committee. You will want at least six people who are willing to work on various projects for the meeting.

At your first local arrangements meeting, you will want to decide who will handle which major projects. The person acting as Chair should be responsible for any finances and signing the hotel contract. You may want to work with others and create sub-committees or assign duties such as:

- Hotel; selecting the hotel and working on the specific details with the caterer
- Evening events; planning a reception and/or dinner away from the hotel
- Registration; creating registration form, mailing packets, managing the database and staffing the registration check-in table.
- Vendors; contacting and soliciting vendors to purchase exhibition space and possibly sponsoring a break or other event, and working with them when they arrive.
- Tours; planning and scheduling tours for members after the meeting is over.
- Program; designing and printing the printed program to guide members through the annual meeting.

It is suggested that the local arrangements committee meet every six weeks until the January before the meeting and then meet once a month.

Ideally, other repositories in your local area can assist by sponsoring some part of the costs of the meeting. In Fort Worth (2001), the Amon Carter Museum generously provided a tote-bag for registered members. In Galveston (1997), two facilities waived their usual rental fees for an evening event.

Choosing your Local Arrangements Committee and assigning duties.

The Program Chair and the Membership Chair serve on Local Arrangements as ex-officio members.

You will also want to work with the Scholarship Committee Chair to set up and staff the Slotto table and sell Slotto tickets.

Hotel

Hotel Contract should include:

- *Number of guest rooms needed per night.*
- *Price of rooms plus related taxes.*
- *Number of meeting rooms and seating capabilities.*
- *Waiver of meeting room charges*
- *Date when guest rooms will be released for general sales.*
- *Cancellation information.*

Work with the Program Chair to require speakers to turn in a list of their AV needs far in advance. You can schedule which equipment will be in which meeting room if you know their needs.

Each meeting room will need at least one podium, with a light and microphone, two tables with a total of four chairs, and two pitchers of water with glasses.

Watch out for hidden charges that will be added onto your hotel bill.

This is the most important part of the conference, because this is where your guests will spend the majority of their time. You need to find a place that is comfortable and within easy distance to a number of restaurants and shops. The conference rooms should be roomy, but not so large that your speakers will become lost. Schedule one local arrangements committee meeting in the hotel restaurant to sample the food and let committee members walk around the hotel.

You will usually work with three different people at the hotel: the Sales Manager, the Catering Manager and a Hotel Liaison. The Hotel Liaison will work with you during the actual conference to supervise room set-ups and provide you with last minute requests. The Catering Manager will work with you on all meals planned for inside the hotel, such as breaks, luncheons and the business breakfast.

The Sales Manager will schedule the room availability and conference meeting space. This will be your first contact. Bring with you the statistics from the last five years of meetings, including dates, locations, hotels, and the number of registered participants. This information is provided for you within this packet.

The Annual Meeting is generally held in May, although the actual weekend has varied. When you schedule the dates for the Annual Meeting, take into consideration hotel availability (can you get a better price for having it on a different weekend), and local community events such as high school and university graduations. In recent years, SSA has received a better hotel rate when hosting the meeting the Friday and Saturday before Memorial Day.

The Sales Manager will ask how many rooms or nights you think SSA will need for the conference. You will need to calculate how many registered participants you think will attend and how many nights they will stay. Traditionally, you will want to reserve no more than 10 rooms on Wednesday and Saturday nights, and 50 rooms for Thursday and Friday nights, for a total of 120 guaranteed nights. There are often stiff penalties if SSA fails to meet the total number of guaranteed nights. This number will vary depending on the cost of the hotel.

Many hotels will be able to provide you with a printed reservation card that you can include in the meeting information packet to be mailed in early March. If this service is available, these will need to be printed and delivered to you with plenty of time to include them in the mailing.

Make it a point to ask the Sales Manager about the costs of the meeting room space. Some hotels will waive the meeting room fees if you meet the guaranteed number of nights that SSA guests stay at the hotel. Others might insist that you host at least one hotel-catered event per day of the conference.

Hotels charge extra for a number of items that may or may not be mentioned to you in your initial meeting. This includes a set-up charge for each meeting room, exhibitor tables, the registration table, electrical hookups for these tables (when needed), audio-visual equipment, and an internet connection. Ask if speakers may bring in their own outside audio-visual equipment, such as a projector.

Vendors will also need space in the hotel for their displays. If they are set up in a hallway, they will need a secure area to store their materials in the evening. If they vendors are scheduled in a conference room, consider where the breaks will take place to encourage the flow of traffic to the vendors. Vendors are a source of financial support for the meeting.

Timeline

Thursday: 8 a.m. – 5 p.m. Registration table
Slotto table (will need secured area overnight)
Exhibitor tables (will need secured area overnight)

9 a.m. – 5 p.m. Pre-conference Sessions
Room for 45 (class room setup)
Morning break
Room for 45 (class room setup)
Afternoon break

Executive Board Meeting
Room for 20-25
Water, soda, coffee, lunch

5 p.m. – 7 p.m. Evening reception activity (may not be in the hotel)

This is a suggested timeline for the SSA Annual Meeting. It can be changed to suit each meeting. This is only an example. You might want to supply the hotel with a copy of this timeline so they know what to plan for.

Friday: 7 a.m. – 10 a.m. Registration table
8 a.m. – 5 p.m. Exhibitor tables (will need secured area overnight)
Slotto table (will need secured area overnight)

Welcome and keynote address (one room for all)

Morning break in exhibitor area

Three break out rooms for sessions – each holding approximately 45-50 people.

Lunch (on own or can schedule a luncheon)

Three break out rooms for sessions

Afternoon break in exhibitor area

Three break out rooms for sessions

6 p.m. – 10 p.m. Evening activity (may not be in the hotel)

Saturday: 7:30 a.m. – 10 a.m. Breakfast / Business meeting / Slotto
(can be buffet or seated)
(requires a podium and microphone; several tables for Slotto items at one side or behind the podium)

10 a.m. – 12 p.m. Three break out rooms for sessions

Lunch on own for members

12 p.m.—2 p.m. Executive Board Meeting
Room for 20-25; Lunch

Afternoon Tours

Transportation

Consider how your guests will arrive to and from the airport, to and from planned events and to the city for the meeting.

To/From Airport

How your guests will arrive to the meeting is a very important detail. In addition to printing up driving directions, you will need to consider those who arrive through the airport. Does the hotel offer a free shuttle? If so, be certain that is included in your sales contract (if necessary) and you print it in the information mailing for members.

If the hotel does not offer this service, it may be necessary to find a company that you contract with for round-trip service. Check out the company in advance, maybe even test them to ensure the buses are clean and on time, and the drivers are polite. This will be the first and last impression your guests have about the meeting.

Also find out the cost for a general taxi fare to and from the airport. Include this information in the information packet mailing so people can budget accordingly.

To/From Events

If you are planning to host a reception, dinner or tour away from the hotel, you will need to coordinate the transportation to and from each event and the hotel. This can be very expensive. If your facility has vans or suburbans that can be used in some form of shuttle service, it could be very effective. In most cases you will have to contract with a company for a bus, mini-bus or van service. Remember that even if an event is within easy walking distance, you may need to provide transportation for those with walking disabilities.

To/From City

Local Arrangements Committees in the past have contracted for discounted fares for their meeting attendees with a variety of airlines and rental car companies. Check to see if something like this will be cost-effective for your meeting.

Food

Breaks

The hotel will offer the breaks in two ways, per person or a la carte, where you order a certain number of everything. You will have to compare the prices to see which is the better deal.

Traditionally, the morning breaks consist of juices, coffee and sweet rolls or donuts. The afternoon breaks offer bottled water, soft drinks, coffee and something sweet such as cookies or brownies. It is a good idea to have a break sponsored by an exhibitor, as the cost can add up quickly.

The hotel will charge you a service charge and sales tax on each meal. Keep this in mind when you are figuring out your budget.

Reception

A reception welcoming SSA members and guests on Thursday night traditionally kicks off the official start of the Annual Meeting. The receptions can be held at the hotel, at an archival repository showing off an exhibition, or at a restaurant/club. Past meetings have been very creative with their receptions, including cocktails, wine, music and dancing. This will be the first time many people have a chance to greet old friends, meet new ones and catch up on news.

Luncheon / Dinner / Second Reception

Having a second social event on Friday offers participants another opportunity to socialize outside of the meetings. Options include a luncheon with a speaker, dinner with entertainment, or a second reception. It is a good idea to get price quotes from caterers and sample their food or talk to someone who has used them before. Many caterers will work with you on what kind of food you want and how much per person you are able to pay. Take into consideration that some members may be vegetarians or require special diets.

SSA is a non-profit organization and exempt from federal taxes. Please contact the Treasurer if there are any questions.

Meetings

The two Executive Board meetings held on Thursday and Saturday will require coffee, drinks and probably a lunch plan. Be sure to put it on the list with the food caterer and check menu ideas with the current President.

Budget

Make sure your registration fees per person cover the events and breaks you are planning. Solicit vendors to purchase table space and sponsor events.

One of the more difficult aspects of planning the annual meeting is creating and working with the budget. SSA as an organization relies on income from the Annual Meeting to survive. There has never been a set amount for registration fees; however a good rule to keep in mind is to make sure your registration fees per person cover all necessary expenses, including meals, breaks, transportation, and events. Postage, copies, programs, envelopes, name tags and other items can also add up quickly. Take these into account when planning your registration fees.

Past Registration Fees:

1998 Lafayette, LA
\$75 Member
\$110 Member late
\$100 Non-member
\$145 Non-member late
\$ 35 Student
\$ 40 Student late

Always keeps a list of the events and the quoted charges. When caterers quote you a per person charge, figure it out for 100 to 125 people. If you can still break even then you're in good shape. The hotel will charge you tax and gratuity on each catered event. Ask your catering manager to consider the event tax-exempt. You can get a copy of SSA's tax-exempt certificate from the Treasurer.

The tours and pre-conference fees are separate from the registration fees. Work with the Professional Development Chair to set the pre-conference fee, which must cover breaks, audio/visual equipment and any speaker fees.

1999 Austin, TX
\$85 Member
\$110 Member late
\$100 Non-member
\$135 Non-member late
\$35 Student
\$40 Student late

Audio/visual needs will be a large expense. To offset this expense, you might be able to bring in outside equipment, but you will need to check with the hotel in advance. Because of the need for internet hookups, another option is to schedule one room to have the connection and assign that room for sessions needing the connection. You will need to work with the Program Chair to get speakers to be specific about their A/V needs when they submit their proposals.

2001 Fort Worth, TX
\$80 Member advance
\$100 Member
\$120 Member On-site
\$ 90 Non-member advance
\$110 Non-member
\$130 Non-member on-site
\$ 40 Student advance
\$ 40 Spouse/SO

The charge for tours will be decided by the Local Arrangements Committee based on the price of the tour and what minimum number of people must register for each tour.

The Board will give you start up fees of \$500 - \$750 to open an account. Do not open an account through your institution. Keep the account separate to avoid late payments.

Your income will be composed mainly of registration fees, vendor fees and gifts or sponsors. If you know well in advance that someone (i.e.: institution) will sponsor a reception, you can remove that expense while figuring the cost per person when calculating the registration fee.

2003 New Orleans, LA
\$80 Member
\$95 Non-member
\$70 Student
\$10 Late Fee for all

Sample Budget

| <u>Expenses</u> | <u>Budget</u> | <u>Actual</u> | |
|--|-----------------------------|---------------------|-----------------------------------|
| <u>Program/Workshops</u> | Program Total | 708.80 | |
| Keynote speaker (Hollinger Funds) | \$200 | \$200 | |
| Workshop Speaker, travel expenses | | \$408.80 | |
| Workshop Speaker, honorarium | | \$100 | |
| <u>Hotel</u> | Hotel Total | 5,133.90 | <u>Revenue:</u> |
| Meeting Space | \$625 | \$625 | Seed money: \$1,610 |
| Exhibit booths (\$25 per table; est. 15 tables) | \$375 | \$375 | Exhibitor Fees \$1,760 |
| Morning coffee/afternoon breaks | \$500 | \$1,057.86 | Registration fees \$14,000 |
| Saturday breakfast (195 @ \$10.50/person + 19%) | \$2,450 | \$2469.60 | (projected) |
| Microphones for event rooms | \$175 | \$210 | |
| SSA Board lunches (Thurs. and Sat.) | | \$396.44 | <u>Underwriting</u> |
| <u>Entertainment</u> | Entertainment Total | 5,528.68 | Hollinger (keynote) \$200 |
| Reception rental/liquor | \$350 | \$697 | Tote-bags \$875 |
| Food for Thurs. reception (195 @ \$10.50/person) | \$2,047.50 | \$2,354.62 | S.A. Univ. \$500 |
| Friday Dinner rental expenses | \$575 | \$585 | SW Micropublishing \$100 |
| Friday Dinner food (200 @ \$8.95/person) | \$1,760 | \$1,790 | |
| Beer/wine/Cokes (Friday reception-partial cost) | | \$ 52.06 | Total Deposits: \$26,135.57 |
| Music/Dancing (Thurs. & Fri.) | \$50 | \$50 | Total Expenses: -17,732.21 |
| <u>Transportation</u> | Transportation total | 3,305.00 | Difference: 8.403.36 |
| Buses (pre-conf; reception; Friday tours/dinner) | \$3,500. | \$3,305.00 | SSA seed money -1,610.00 |
| <u>Promotional</u> | Promotional total | 3,055.83 | Total "profit" \$ 6,793.36 |
| Conference registration packet/design printing | \$ 0 | \$ 0 | |
| Postage to mail registration and exhibitor packets | \$350 | \$350 | |
| Conference program/printing | \$ 0 | \$ 0 | |
| Exhibitor packets/design and printing | \$ 0 | \$ 0 | |
| Give-away tote-bag @ \$4.95 ea (bud.175/ord.200) | \$ 875 | \$990 | |
| Copies, labels, misc. supplies | | \$411.70 | |
| Refunds | | \$760 | |
| Slotto petty cash | | \$142.50 | |
| Shirts for Local Arrangements | | \$366.63 | |
| | TOTAL EXPENSES | \$ 17,732.21 | |

Tours

Tours are a great chance to show off the highlights of your city.

Tours enhance the meeting by allowing SSA members and their guests to see the color and style of your city. One person on the Local Arrangements Committee may head up a subcommittee to plan and develop tour options. One idea is to check with the hotel to see if they have a tour company that they work with often and can recommend. Also check with the convention and visitors information bureau for ideas.

Tours in the past have ranged from tourist attractions to behind-the-scenes tours at archival repositories or museums. Recently, tours have been offered on Thursdays as alternative entertainment for spouses/family, or for people attending half day workshops. Saturday afternoon and Sunday morning tours give people an excuse to stay over and enjoy the cultural offerings of your city.

When listing the available tours in the registration packet, be certain to disclose ahead of time how many people are needed to make the tour and make plans to cancel in advance and provide refunds if needed.

Many tour groups will need a 50% deposit in advance to hold the booking. Get confirmation for the times of the tours and be certain they fit in the available times. Include all time schedules in the pre-conference information.

If you do not work with a tour company, but arrange your tours personally, be certain to include the cost of transportation when calculating the tour price for members.

You will want brochures advertising the tours to encourage many people to participate. If you use a tour company, they should provide the brochures or flyers advertising the tours. Another good draw is providing the links to various destinations on a web page .

All contracts should be signed by the Chair of the Local Arrangements Committee, and it is a good idea to contact the tour company the week before the Annual Meeting to verify all of the arrangements.

Vendors

This is a rewarding area to work on, because we have such a good relationship with a number of businesses through the SSA newsletter and previous meetings.

A small subcommittee should be in charge of contacting the vendors and working with them during the conference. The Vendors subcommittee should begin by looking at the previous year's vendors application forms, fees and letters. Past offerings have included exhibit tables, sponsorships, literature contributions, and Slotto donations.

They will need to decide how much to charge the vendors to exhibit at the Annual Meeting, and just as important, what benefits to give the vendors. Benefits can range from advertising at the meeting, putting advertising in the program, and recognizing the vendors on our web page.

Another thing to consider is the space the vendors will have in the hotel. The exhibit tables should be in an area of high traffic flow and in close proximity to the food during the breaks. Some vendors will need electricity connections – be sure to add this on the application form. Exhibits should be able to be secured in the evenings with minimal trouble to the vendors.

Next, create an application form with all appropriate offerings and fees listed. Write a cover letter inviting vendors to exhibit and sponsor special events, such as the printing costs or a break between sessions. You will need to have a deadline for application.

To create your vendor mailing list, begin by requesting a list of companies, contact names, and addresses for all who currently advertise in the *Southwestern Archivist*. Add to this list any additional vendors that have previously attended Annual Meetings. Seek out local vendors from your area. These might include companies who supply: rare books, disaster recovery, micro graphics, digital consulting, shredders, local presses (University Press), records storage, shelving, and office supply.

Send out the first contact letter to these businesses as early as possible, at least six to ten months prior to the meeting.

Information and forms regarding sponsorship opportunities and product donations for Slotto should be included with the registration mailing. Outline areas that need sponsoring or underwriting, such as the reception, all food breaks between sessions, the cost of printing the program. Give various price levels of sponsorship and have it assigned to a specific item. Include what benefits or free advertising the sponsor will receive for their donation.

Some time after sending out the letters, begin telephoning the prospective vendors, especially any new vendors who have never participated in SSA meeting before. At one meeting, eleven of the thirteen vendors signed on as a direct result of a personalized follow-up phone call. Start calling vendors no later than one month in advance of their deadline.

Remember to send a receipt, thank you and confirmation to all registered vendors. Have plans for when they check in at the Annual Meeting. Be certain you have created registration packets and nametags for the vendors also. Have someone available to escort each vendor to the area in the hotel where they will be setting up, and let them know where they can secure their supplies at night. The SSA – Vendor relationship is a very important one since we need their support to have a good meeting. Acknowledge them appropriately in the program and at the business breakfast. Send thank you letters after the meeting.

This is a very important part of the conference. The vendor sub-committee should be creative and diligent in reaching new vendors from the local area.

Specify the benefits that they will receive for exhibiting or sponsoring SSA. Describe the attraction of your location and emphasize the opportunity to speak and sell directly to the archival community.

Vendors do us a great service by purchasing space and sponsoring our events. Encourage members to spend some time talking with the vendors and let them know we value and appreciate their support.

Pre-Registration

Remember this packet will be many members' introduction to your city. You want to sell the conference and your city in the most positive, interesting view available. The goal is to have as many members possible attend.

Create more packets than members, because as people hear about the meeting they will contact you to have a packet mailed to them.

It is possible that some of the presenters will not register. Decide beforehand whether you will require the presenters to register and communicate that information to the Program Chair. This should be mentioned in the call for papers.

Pre-registration packets should be ready to mail to the SSA membership in early March. All SSA mailings should go out as first-class mail. Also, place registration information on the SSA website.

Inside the packet you will need to provide the following information:

Hotel Information

- Prices
- Toll-Free reservation number
- Deadline for reservations

Travel Information

- Directions by car from each direction
- Any special discounts for airline or rental cars
- Available shuttles and costs from airport to hotel

Conference Information

- Theme
- Executive Board meeting schedule
- Pre-Conference workshops (times, descriptions, and prices)
- Program (times, descriptions and speakers)

Evening Events

- Thursday reception – date, time, and location
- Friday dinner – date, time, and location

Tours

- Date, time, descriptions and prices

Registration Forms

- Include all events: Program, Workshops, Tours and Events
- Fees for members, students and guests or spouses
- Deadline
- Names and institutions for badges

Brochures

- Advertising the city, hotel, and places of interest

Contact Information

- Name, phone number, email of someone to call for additional information

Registration

Design

The registration form included in the pre-conference packets should be designed by the person who designs and manages the registration database. On the form ask the registrant to specify whether the address they are giving is home or work. Set up the form so that it can be easily added to the database (i.e.: address line 1 and address line 2) One address and one phone number for each registrant is sufficient.

Create separate database fields for monies received for conference registration, workshop registration and dues payment. This will facilitate production of receipts, provide more specific data on funds received and make it easier to report to the Treasurer.

Set up the database from the beginning with a “cancelled” field and use it when people cancel. This will allow you to generate a list of needed refunds. You will also be able to use it in all queries to remove cancellations from the database reports.

Processing Mail Registrations

Establish a deadline for receiving registrations in the mail. Specify whether it is a received by date or a postmarked date. You will need to have a clear pre-determined policy on student early, late and onsite registration deadlines and fees.

Do not accept faxed registrations. It is not fair to allow a faxed form without money ahead of a mailed form with money enclosed, especially if a workshop or tour is filling up fast. You can hold the faxed form until a check is received and then enter it into the database.

Create a waiting list for workshops and tours if they fill up. That way you can notify someone if there is an opening. Confirm the workshop registrations via email.

Log incoming checks immediately and make deposits to the bank on a regular basis. Set up your ledger to monitor the different streams of income such as workshop fees, registration fees, membership fees, vendor fees and sponsor donations.

On-site Registration

A registration table should be open on Thursday morning before the first pre-conference workshop, and should remain open through the beginning of the reception for late arrivals. The table should also open again on Friday morning. Have a policy in place for those who say they have registered, but their registration had never been received.

Warn late registrants that we do not take credit cards or cash, so they will need to bring a check. Have a cash box at the registration desk and a notebook with all the printed database reports. Have a supply of pre-printed badges at the desk that require only people’s names to be written in.

Make announcements that if people find they will not be using their tour tickets, they should turn them in so that others can have their spots. Occasionally, people may not show up for a tour for which they had pre-registered, and some people who tried to pre-register had to be turned away. Include in the registration notebook the remaining tour tickets so that registration workers will know whether people can be added to tours or not. Have an up-to-date list of tour participants for each bus monitor.

Make it clear in the registration form that there is no one-day conference rate, and that on-site registration will be held to the on-site fee. Setting an early registration deadline or creating an “early bird” registration date will help keep you from having too many late registrations.

Some people may expect a conference registration confirmation. Make a decision how this will be handled. You can send an email confirmation of registration or, if no email address was provided, you can send a post-card

When members check in, they should receive a packet containing the official program, nametag, receipt, a dining guide, city map, brochures, a list of vendors, and a conference evaluation form. You can use the registration database to print a list of all conference attendees. This information should also be included in the registration packet.

Program

Take an extra copy of the previous year's program and use it as a guide when creating your own.

The Vice-President also serves as the Program Chair and is responsible for arranging the sessions and presenters. The pre-conference workshops are the responsibility of the Professional Development Chair. The Local Arrangements Chair will work closely with both of these individuals in order to have the preliminary program details available at the time the pre-registration packets are mailed in March.

By April you should have all the necessary information about the sessions available to assign hotel meeting rooms. The printed program traditionally has a title, the conference dates, the schedule and location of all workshops, meetings, sessions, breaks, and social events. The program is an ideal place to list all sponsors and vendors, and list the members of the Local Arrangements Committee. It is a good idea to seek a sponsor to help defray the costs of printing the program.

After the Meeting

Deposit any on-site registrations or other income.

Send thank you letters to members of the Local Arrangements Committee, vendors, the hotel, caterers, transportation, and the presenters.

Balance all financial records with the final bank statement.

After the last check has cleared, close the account and send a cashiers check to the Treasurer.

Created a detailed written final report for the SSA Executive Board. The report should include:

- A detailed budget, including total receipts and expenditures, and net gain. (An example is given on page 11 of this guide.)
- A detailed registration report, including the total number of registrations broken down by members, non-members, students, and guests. Also include the number who pre-registered and registered on-site.
- The total number of hotel rooms (overnight) booked at the SSA rate, and broken down per night if the information is available from the hotel.
- Tour information including name of the tour and the number of people who signed up and attended the tour.

Pay all outstanding bills promptly. This is very important and goes towards building good credit for the organization.

Calendar

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12-18 Months

- Decide on Local Arrangements Committee
- Assign team to research hotels
- Decide on theme, title, and logo (if desired) for conference
- Choose hotel and sign contract

Plan to promote your meeting during the Business Breakfast at the annual meeting preceding yours. Past promotions have included brochures, flyers, and a slide presentation.

10-12 Months

- Promote your city at the Annual Meeting preceding yours.
- Get start-up funds from SSA Board
- Open checking account
- Discuss budget, dinner and reception ideas
- Assign projects for: Dinner, Reception, Tours, Transportation, Vendors, Web Page, Registration, and Volunteer Coordinator

6-10 Months

- Choose evening event locations
- Decide on tours and transportation
- Decide on exhibitor fees and sponsorships
- Send out vendor registration mailing (Nov/Dec)

Write an article for the Southwestern Archivist to "sell" your city and drum up interest in the Annual Meeting. Plan for at least one mention of your meeting for each issue during the year

January

- Decide on all registration fees
- Create registration forms and registration database
- Begin collecting SLOTTO items

February

- Get mailing labels from Treasurer
- Get copy of the program from the Program Chair/Vice President
- Gather material and stuff pre-registration packets

March

- Mail pre-registration packets
- Create filing system for organizing incoming registrations
- Finalize exhibitor registrations and hotel arrangements.

Devise a method of identifying Officers, Executive Board Members, Local Arrangement Committee members and new attendees on the name-tags. The new attendees tag should be very discreet.

April

- Design final program and sent to the printer
- Collect material for conference packets
- Locate something to hold SLOTTO tickets for the drawings.
- Coordinate with Scholarship Chair regarding staffing the SLOTTO table and selling the tickets.

May

- Print nametags
- Stuff conference packets
- Staff registration table and SLOTTO table
- Walk through hotel with meeting manager and hotel liaison.
- Print signs for each meeting room listing which sessions will be given there.
- Call vendors and remind them about the meeting.
- Call all companies you have a contract with (food, transportation, etc.) and remind them about the meeting.

Statistics

STATISTICS FROM PREVIOUS MEETINGS

These statistics will be helpful in planning your meeting.

Annual Meeting 1998 – Lafayette, Louisiana
May 28-30
Hilton Hotel
144 registrants

The hotel sales manager may ask you for a list of previous hotels and the number of registrants from past meetings in order to check our credit.

Annual Meeting 1999 – Austin, Texas
May 27-29
Hyatt Regency Hotel
173 registrants

Paying the hotel bill is extremely important to continue to build good credit for SSA.

Annual Meeting 2000 – Fayetteville, Arkansas
May 18-20
Fayetteville Hilton
130 registrants

Annual Meeting 2001 – Fort Worth, Texas
May 24-26
Radisson Plaza Hotel
218 registrants
164 hotel nights

Annual Meeting 2002 – Flagstaff, Arizona (joint meeting with CIMA)
May 16-18
Little America Hotel
229 registrants

Annual Meeting 2003 – New Orleans, Louisiana
May 22-24
Embassy Suites Hotel
159 registrants

Sample Registration Database Entry Screen

Contact Info

Title: **Local Arrangements Committee**

Last Name: **Hodges** First Name: **Ann** Middle: **E.**

Institution: **University of Texas at Arlington**

Address 1: **University Libraries, Special Collecti** Address 2: **P.O. Box 19497**

City: **Arlington** State: **TX** Zip: **76019-0497**

Day Phone: **(817) 272-7510** Eye Phone: Other Phone:

E-mail: **ann.hodges@uta.edu** Fax: **(817) 272-3360**

Exit MS-Access

Admin Info

Postmark and receipt dates are needed for late charges and event enrollment cutoff:

Date Rec'd: **03/28/2001** Postmarked: **03/28/2001** Amount Paid: **\$80.00**

Check if yes: Member First Conference? Regular Attendee?

Note:

Uncheck if no: Print on Attendee List? **Check if did not attend**

Run Notes Query

Record Created: Registrant ID: **1**

Friday Breakfast

(Enter 1 if attending)

Check if Special Diet

Workshops

Tours

1st: **FW Walk**

2nd:

Run queries for limited tours:

JFK **SMU**

Total Registered
