

Annual Meeting Planning Manual

September 15, 2009

This Manual is meant to assist each chapter in the planning of the Annual Meeting. The Manual was compiled by CoNPS Vice-President, Al Schneider, from the notes of Dick Moseley, Liz Klein, and Deby Stabler (recent chairs of Annual Meeting planning committees), and the comments of other members of CoNPS. Before being submitted to the CoNPS Board, the Draft Planning Manual was reviewed by the above mentioned Annual Meeting chairs, the 2008-2009 officers of CoNPS, and the CoNPS Administrative Assistant.

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Each year the Manual should be added to so that future planning runs even more smoothly.

Overview:

Function and Time of the Meeting:

The CoNPS Annual Meeting is a significant event, a time for members to get acquainted, to learn about Colorado flora, and especially to be invigorated by these social and intellectual exchanges.

Typically the Annual Meeting has started on a Friday evening with a social and registration and has been followed on Saturday by a full day (8 a.m. - 5 or 6 p.m.) of lectures, poster sessions, breakout sessions, panel discussions, etc. Sunday has been devoted to a full day of field trips. If the sponsoring CoNPS chapter wants the Meeting to be longer (perhaps 1 ½ days of both lectures and field trips) that is acceptable. For many years the meeting has been in early September but if a chapter wishes it to be earlier in the summer or in late spring that is acceptable.

Role of the Sponsoring Chapter:

The sponsoring chapter is responsible for working out the details of the meeting including acquiring the meeting room, focusing on a theme (if there is one), obtaining guest speakers, registering participants, providing Society members helpful information about such items as motel and camping accommodation, arranging for dinners and lunches (if provided), setting up the first evening social, staying within the budget, following a detailed plan, etc. Individual details are to be published on the web site as soon as they are available and they are to be published in *Aquilegia* periodically and in final form in an issue approximately two-three months prior to the actual Annual Meeting.

Role of the Vice-President:

The CoNPS Bylaws indicate that the Vice-President of the Society is to act as the overall coordinator of the Annual Meeting. The VP should make sure that the Meeting supports the mission, standards, and directives of the Board and should provide continuity from year to year. Further, the VP should assist with Meeting details; answer questions for the Annual Meeting Committee; make sure that the chapter establishes Annual Meeting committees and a calendar

of action and stays within the budget (or helps acquire more funds), etc. The VP will make sure that the “Annual Meeting Manual” is up-dated and given to the new planning committee and the VP will be sure that forms from previous years (the registration form, spreadsheet, name tags, etc.) are available to the new planning committee.

Budget:

The intent is that the Meeting break even or make money for CoNPS. As of 2009 an Annual Meeting registration fee of \$30/person is to be charged. This money covers fixed expenses for the Annual Meeting and all other expenses are to be covered by other fees charged to the Meeting participants and/or by fees from vendors, donations, etc. The Board may see fit to further support the Annual Meeting with budgeted money.

Shared Use of the Meeting Room:

The Colorado Rare Plants Symposium has traditionally been held the day before the CoNPS Annual Meeting using the same facilities. For a number of years CoNPS has paid for the room for both the Symposium and the Annual Meeting. (Other costs associated with the Rare Plants Symposium are borne by the Symposium sponsors.) The Annual Meeting room is also used for a Board meeting, and on the evening prior to the Annual Meeting the room is used for a CoNPS social. Sales Committee members should be consulted to determine how much room they need for book displays and sales.

Detailed Suggestions for Planning the Annual Meeting

The first step that the Annual Meeting Planning Committee will want to take is to establish a calendar of action. Then responsibilities for tasks should be delegated with completion dates indicated. Chairs for each committee should be established and an overall Annual Meeting Planning Chair should be designated.

The CoNPS Vice-President (the Board's representative to the Annual Meeting Planning Committee) should be kept informed of the progress of the Planning Committee through the Chair of the Committee.

Following is a list to assist in the Annual Meeting Planning. Details about each point follow the brief list.

The Annual Meeting Planning Committee should:

1) Establish committees. 2) Reserve a meeting place at least 10 months prior to the Annual Meeting. 3) Secure speakers at least 6-8 months prior to the Annual Meeting. 4) Publicize the complete details of the Annual Meeting at least two-three months prior to the Annual Meeting. 5) Secure field trip leaders and locations at least 7 months prior to the Annual Meeting. 6) Develop various literature, such as, the registration form, advertising, and schedule. 7) Advise each speaker about the computer facilities available and the format their presentations should be in. 8) Make all aspects of the Annual Meeting as green as possible. 9) Involve students and professors in the Annual Meeting. 10) Take care of post-Annual Meeting tasks.

Details about the above points:

1) The Committees

Rather than asking chapter members to “volunteer to assist with the Annual Meeting”, the planning committee should develop a specific jobs list, give an indication of how long each job might take, and give an estimate of when each job needs to be finished. This list should be emailed/mailed to chapter members so they then can volunteer to assist.

One person should be appointed “Chair of the Annual Meeting Committee”. This person is not necessarily responsible for obtaining the meeting place and speakers, arranging the field trips, etc., but instead, serves to coordinate the actions of everyone else and keep the planning on schedule.

Committees often consist just of one person reporting back to the Chair of the Annual Meeting Committee.

It is valuable to have occasional meetings to keep up spirit and make planning enjoyable. Most communication can, of course, be done on the phone and via email.

Committees are needed for the following:

Facilities Speakers Media – including assisting speakers in the weeks prior to the Meeting and running the laptop and projector during the Meeting. Lunch and dinner banquet Food donations and purchases Silent auction Sale of native plant-related items, such as, note cards and native plants Coordination with book sales and rare plants symposium Publicity Accommodations, including campgrounds, motels, RV parks, etc. Registration, including the following:

- A) creating and maintaining the spreadsheet
- B) keeping track of who has paid
- C) making name tags (including name, meals paid for, and field trips selected)
- D) printing lists of participants on each field trip and lists of who has paid for meals

2) The Meeting Place

A comparison of various facilities should be made in person. It is not necessary to take the lowest bid.

Check that the price given is all inclusive or that you know what the extra charges will be. Ask for a list of facility options; this will help tell you what options are not included in the room price. Common extra charges are for screen, projector, more than one change of chair arrangement, convention facility extra charge per plate when food is catered, extension cords, Internet connection, coffee pots, etc.

Some convention facilities do not allow food to be brought in from outside. If possible, avoid booking such facilities since it is always a treat to have CoNPS members donate homemade sweets and to be able to bring in fruit, veggie, and cheese trays. The cost of using a facility that requires us to use caterers is often quite high, much higher than if we are allowed to bring in our own food or pick our own caterer. Be aware that even if we are allowed to pick our own caterer, some convention facilities charge their own fee for each person that the caterer serves.

The room(s) need to be large enough to seat about 120 people, have sufficient tables and chairs (with the setup fee included or known), have security for locking up the book sales room (or, better yet, have the book sales area as part of the main room so that all rooms are locked at the same time and so that the sales committee can hear all the speakers), have room for silent auction and sales items, have display room if there are to be poster sessions, and have various options, such as, Internet connection (if needed), computer projector, lectern, coffee/tea pots, catering kitchen. (Note: If the book sales are part of the main room, there should be no sales while speakers are making their presentations. If the book sales are in a separate room, the room should be locked while speakers are presenting so that the folks tending the book sales can listen to the presentations.)

Be sure to get the exact daily hours that the facility can be used by CoNPS.

Check on the availability of a cash bar (and any charges for it) in the room for our social.

Is liability insurance needed?

Does the facility have plenty of parking and is there a charge for parking?

Be sure to check out the audio system when shopping for the room. The day before the meeting check the system again and also check the functioning of the various light switches. Put someone in charge of these two items for the days of the Meeting. Lights need to be dimmed and brightened often for speakers. Someone needs to position the microphone properly for each speaker and to walk around the Meeting room during the presentation to be sure everyone can hear. The person in charge of the microphone may need to reposition it while the speaker is presenting. This may seem an intrusion but if folks cannot hear the speaker, that is far worse.

Is the facility near motels and restaurants to reduce the environmental impact of driving?

Does the facility have a kitchen and can it make lunches and suppers (on non-disposable, re-useable plates)?

Does the facility recycle?

Lunch for the main day of speaker presentations should be provided (at an extra charge per person). Either the meeting facility or an outside caterer can be used. If the latter, be sure to find out if the meeting facility levies a per-plate catering charge.

Having a Saturday night banquet with a key-note speaker is a good option to consider. The banquet provides attendees another time to socialize and to learn about Colorado native plants. Charge for the lunch and dinner can be mandatory for all attendees or can be an option for attendees to elect. Either way, be sure to check with the food providers to find out the latest day they need a

final number of diners. Publish this meal cut-off date on the registration form.

Many months prior to the Annual Meeting, the Planning Committee should secure a contract and pay any necessary down payment or fees so that there is absolutely no question that the facility is reserved for the Annual Meeting.

Have just one person on the planning committee be the contact person to do all the negotiating and work out all the details with the manager of the convention facility. Be sure this CoNPS person has an answering machine on their telephone. All of the information obtained by this person should be shared on a regular basis with the CoNPS Vice-President.

3) The Speakers

Obtain speakers at least 6-8 months in advance. If possible, before asking someone to speak, find folks who have heard the person speak.

If you have a theme for your Annual Meetings be sure your speakers are aware of it.

Ask each speaker to provide you the title of their presentation and an abstract for publicity. These materials should be in your hands as soon as possible, but no later than the deadline for publication in the Society newsletter, approximately 2-3 months prior to the Annual Meeting.

To appeal to the broad range of interests of Annual Meeting attendees and to keep interest level high and prevent boredom, consider providing a variety of technical levels of presentations and a variety of formats (stand up speakers, panel discussions, poster sessions, breakout sessions, etc.)

Time given to each speaker/panel might vary from 15-60 minutes. A variety of times helps keep the audience interested. Very short presentations of 10-15 minutes can be back to back with no time between them, but allow 5-10 minutes between longer presentations to give time for speakers to finish answering questions, pick up their notes, and move aside for the next speaker to get ready. The audience should be made to understand that this is just a transition time, not a break time. Schedule a 20 minute break in the morning and the afternoon. Book sales can be available at these breaks.

Speakers should receive details about what is expected from them regarding the subject matter. What subject are they to cover? What level of difficulty should the presentation be at? Etc.

We need to remind speakers of some basics (even though one would think these quite elementary):

a) Just as all quotations need to have a clearly readable reference to their author, so do all photographs need to be labeled. It is imperative that photographers be contacted by the speaker for permission to use their photographs.

b) Speakers need to be reminded to speak loudly directly into the microphone and not to turn their back on the audience to point to the screen with the laser pointer. Speakers should be reminded of this in written instructions and then again at the very beginning of their presentation. The tech person can eliminate the laser pointer and instead use the mouse pointer on the computer the speaker is looking at.

c) Despite your telling speakers about b), they may not project their voice or speak into the microphone. It is ultimately our responsibility to make sure the audience can hear what is being said, so we need to have someone roam the room to see if each presentation can be heard. This room roamer must be brave enough and forceful enough to go up to any speaker and readjust the microphone and remind them (before and during their talk) to speak up

loudly into the mic.

Speakers need to be told exactly how long their presentation is to be and we need to make it clear to the presenter that they only have the set amount of time. We need to have a time-keeper who lets them know when they have 5 minutes left and then stops them at their given time. If this is not done, chaos ensues.

We do not have enough money to pay an honorarium for our speakers or to pay travel expenses – except in unusual cases. Generally it is best to get local folks as speakers, or to get folks who know that our finances don't allow us to pay. We will pay for modest motel rooms for those coming from a long distance.

Get a firm commitment from your speakers.

Give your speakers a contact name and phone number on your committee.

Check back with the speakers at least twice, once several months after you have first contacted them and then again about 2-4 weeks before the Annual Meeting to see if they need any assistance from you.

Be sure to tell each speaker that you will be using one PC to hold all presentations and that presentations need to be delivered to your media person at least several days (a week?) prior to the Meeting to be loaded on the hard drive. The media person should check each presentation for proper functioning before the day of the presentations. Advise presenters that file size of presentations should be kept to a minimum consistent with quality.

4) Publicity

The dates, place, and other details about the Annual Meeting should be sent to the webmaster as soon as they are known and should be updated regularly. Whatever details are known should be sent to the editor *Aquilegia* before the deadline for each issue. The final schedule should be in the hands of the editor and webmaster no later than about 2-3 months prior to the actual Meeting. The editor will include this information in the next issue of *Aquilegia* and the webmaster will put it online immediately. The Annual Meeting Chair needs to speak with the *Aquilegia* editor about the deadline for submitting material about the Annual Meeting.

Publicity should be sent out to all the local radio stations and newspapers about a month before the Meeting.

5) Field Trips

Field trips should show a variety of terrain and flora and should be of varying degrees of difficulty to accommodate those who cannot walk much, those who can, and those who want a detailed botanical outing. Most trips should be for a half day and several should be all day. Group size should be limited to no more than 15 to reduce our impact and to afford a more personal trip. If at all possible, field trips should be close to the Annual Meeting facility to reduce driving time, to allow participants plenty of time to attend both a morning and afternoon trip, and to reduce our environmental impact. Field trips on the final day of the Annual Meeting should be north, south, east, and west of the Meeting site so folks can choose one that is on their way home.

As soon as possible, the field trip leader should provide details about the field trip distance from the Meeting facility, limitations on parking at the trailhead, number of miles and roughness of terrain to be walked, flora to be seen, and special requirements (4-wheel drive, rubber boots, bug repellent, etc.). This information should be published on-line and in *Aquilegia* as soon as it is available so participants can make an informed decision about which trip they want to attend. The registration form should have Meeting attendees prioritize their field trip choices (1,2,3,4,5...) and trips should be assigned on a first-come, first-served basis.

6) Develop Registration Forms and Literature

Registration forms from previous Annual Meetings can easily and quickly be modified for each new Meeting. On-line registration and payment have proved to be time and paper-saving but weeks of lead time are necessary to develop the necessary forms. A spreadsheet should be developed to deal with all the data that will come in from the registration form. Several copies of the spreadsheet (alphabetized) should be printed to check-in people at the Meeting.

The registration form should request all the information needed for the Annual Meeting: field trip preference, lunch and dinner preferences, car-pooling needs, etc. Field trips should be assigned on a first-come, first-served basis. All those requesting car-pools should be sent the name, address, phone, and email of all others asking about car-pools. They can then arrange the carpools.

From the spreadsheet several items will need to be printed: 1) Name tags (which should include information about field trips assigned, meals paid for, etc.). Be sure the name tags can be re-used for the several days of the Meeting. 2) Rosters of participants in each field trip.

Specify a final date for on-line and mail-in registration to be received; this is typically no later than about fourteen days before the Meeting. This will also be the last day to sign up for lunches and dinners; caterers typically need this amount of time. Registration should be accepted at the Annual Meeting, but food will not be available and field trips may be full. To encourage early registration, a late fee can be charged. All literature should encourage folks to sign up early and to do so and pay on-line; let folks know that this saves the planning committee much time and saves paper, postage, etc.

Establish a refund policy. Generally this is, "50% refunds of any payments if the request is received more than two weeks prior to the Meeting. No refunds in the last two weeks." This policy should be written on the registration form.

7) Hardware and Media

We have probably all been at conferences that had computer and projector troubles, sometimes so bad that speakers could not show any of their presentation. Such problems typically result from several areas: 1) The computer and projector cannot communicate. 2) The memory storage device (flash drive, disk, etc.) won't work on the computer. 3) The presentation was developed on a Mac and the meeting uses a PC. 4) The file sizes are too large for the memory of the computer.

These and other problems can be avoided by doing several things: 1) Do not rely on each presenter to bring in their own computer. The planning committee should have two (one for a backup) of its own very new laptops with sophisticated operating systems, much RAM, and PowerPoint software.

2) The planning committee person running the laptops should practice using the computers in the Annual Meeting room. 3) Speakers should be told what kind of computer will be used and what kind of memory storage device (DVD, flash, etc.) their presentation should be submitted on. If speakers bring their presentation on a very new device that our laptop cannot handle, there can be no presentation. 4) Speakers should give their presentation to the media person no later than the day (or several days?) before the presentation so that it can be loaded on the hard drive and checked for proper functioning. 5) Speakers should be told to reduce file sizes to the minimum necessary for a clear presentation. This file size is often much smaller than most people think. 6) There should be two computer projectors in case one fails.

8) Green Meetings

As a society devoted to the protection and enjoyment of the flora of our Colorado environment, we should do everything possible to keep from despoiling that environment in our Society actions, field trips, and meetings. During the planning and conduct of our Annual Meeting we should strive to reduce our impact in at least the following ways:

A) Encourage participants to bring their own cup, utensils, plates, cloth napkin, etc. to the Annual Meeting. B) Find caterers that use washable cups, utensils, plates, etc. and cloth napkins. C) Encourage the facilities we use to recycle our waste. D) Encourage carpooling. E) Reduce our use of paper to the minimum. F) Encourage everyone to register electronically to reduce our use of paper. G) Find a convention facility that has nearby motels and restaurants to reduce driving. H) Refrain from giving Annual Meeting participants environmentally destructive gifts, such as, plastic water bottles and packages of tourist information. I) Follow other green guidelines such as those on the EPA's "Green Meetings" web site.

9) Involve students and professors in the Annual Meeting.

Local colleges should be informed about the Annual Meeting and students and professors should be encouraged to attend and make presentations. The Annual Meeting Chair has the authority to reduce or waive fees for students on an individual basis.

10) After-Meeting Tasks

A) Be sure all bills are presented to the CoNPS Treasurer for prompt payment. B) Write thank you notes to speakers, those who donate to the silent auction, and others who assisted with the Meeting. Use Society letterhead stationery and make each letter personal. Have the letter signed by the Annual Meeting Committee Chair and the President of the Society. C) Be sure to have someone available to take care of comments/problems in the weeks after the Meeting. For instance, there are commonly questions about uncashed registration checks, lost items, and other Meeting details. D) Add comments to this Planning Manual.