

Annual Meeting Planning Manual

Update #5 - November 7, 2010

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.

Updated in 2010 by Jannette Wesley, Chair of the 2010 Annual Meeting, and incorporating notes from Pamela Smith for the 2009 Annual Meeting.

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

Overview:

Function and Time of the Meeting:

The Colorado Native Plant Society (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 been held in coordination with the Colorado Rare Plants Symposium sponsored by the Colorado Rare Plant Technical Committee (CoRPTC). The Colorado Rare Symposium meeting is held Friday, during the day prior to the CoNPS evening social and registration for the CoNPS Annual Meeting. Saturday is devoted to 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. The organizing committee needs to consider availability of speakers for the event. During field season many of the desired speakers are unavailable. For this reason, the meeting has been traditionally scheduled in early September.

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 with helpful information such 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. The Chapter should form an Annual Meeting Planning Committee to accomplish these tasks. 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 updated 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 budget for the Annual Meeting is set by the Board of Directors. Since 2009, an Annual Meeting registration fee of \$30/person has been charged. The registration fee was raised in 2009 in order to cover all meeting expenses, so that additional money supplements from the Board of Directors would not be necessary. Student discounts should be made available to encourage them to register for the meeting.

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.) In the past, the Annual Meeting room was also used for a Board meeting (but it has since been decided by the Board that no board meetings will be held during this weekend), 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. When use of the same facility for both meetings is too costly, arrange for a free space for the CoRPTC meeting at a college, government office building, or extension service facility and hold the Friday evening social at a local restaurant with a happy hour. This arrangement worked well in Denver, however, registration for the CoNPS Annual Meeting was not conducted at the Friday night social.

Detailed Suggestions for Planning the Annual Meeting

The first steps that the Annual Meeting Planning Committee will want to take are:

- Establish a calendar of action.
- Responsibilities for tasks should be delegated with completion dates indicated.
- Establish appropriate committees and chairs for each committee.
- 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. If the meeting is scheduled in Denver the meeting space should be reserved 18 months prior to the event.
3. Secure speakers at least 6-8 months prior to the Annual Meeting. Arrange to get an abstract of the speaker's topic immediately. It may be necessary to discuss the abstract with the speaker over the phone, take notes, and draft an abstract for their review. If desired by the committee, develop a theme for the meeting
4. Coordinate with the Rare Plant Technical Committee for the Rare Plant Symposium.
5. Coordination with Book Sales.
6. Publicity - Update CoNPS web site 6 months prior to the Annual Meeting with the dates of the event, and list of speakers. Publicize the complete details of the Annual Meeting at least three months prior to the Annual Meeting.
7. Secure field trip leaders and locations at least 7 months prior to the Annual Meeting.
8. Develop various literature, such as the registration form, advertising, and schedule.
9. Advise each speaker about the computer facilities available and the format their presentations should be in.
10. Make all aspects of the Annual Meeting as green as possible.
11. Take care of post-Annual Meeting tasks.

Details about the above points:

1. Establish 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
 - Give an estimate of when each job needs to be finished
 - This list should be emailed/mailed to chapter members so they can then 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/volunteers are needed for the following:

- Facilities – locate, rent
- Program Committee - contact speakers for Saturday events
- Field Trips –work with Program Committee to arrange for field trips in the meeting locality
- Media – Assist speakers in the weeks prior to the meeting and run the laptop and projector during the Meeting.
- Lunch and morning refreshments - Ensure that coffee and hot water for tea are available in morning when registration opens. Make arrangements with the caterer for lunch and morning break refreshments. Afternoon refreshments are optional.
- Posters – solicit posters from universities and CoNPS members. An appeal with the meeting theme should be sent out in January prior to the Annual Meeting announcing the meeting theme and rules.
- Recycle – ensure that containers for recycling are clearly labeled and that contents contained in these contains reflect the signage.
- Silent auction – solicit contributions from CoNPS members, nurseries, and other interested groups.
- Sponsors – solicit vendors who are willing to rent a table to sell merchandise or donate money for the event.
- Sale of native plant-related items, such as, note cards and native plants
- Coordinate with CoNPS Book Sales Committee
- Coordinate with the Rare Plant Technical Committee
- Publicity – a list of possible contacts is attached.
- Registration, including the following:
 - Create and maintain the spreadsheet
 - Keep track of who has paid
 - Make name tags (including name, meals paid for, and field trips selected)
 - Print lists of participants on each field trip and lists of who has paid for meals
 - Provide a list of recommended area motels, RV parks, and campgrounds

2. The Meeting Place

- Reserve a meeting place at least 10 months prior to the Annual Meeting. If the meeting is scheduled in Denver the meeting space should be reserved 18 months prior to the event.
 - 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 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 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 have the book sales area as part of the main room so that all rooms are locked at the same time),
 - (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.)
 - 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
- Be sure to get the exact daily hours that the facility can be used by CoNPS.
- Is there availability of a cash bar 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. Some meetings have used a local non-profit group cater the meeting as a fund raising event for them.

- Lunch selections should be limited to 3 or 4 choices with a vegetarian option. Also make sure the caterer can handle any special dietary considerations, e.g. gluten or dairy sensitivity. Have a place on the form for people to indicate their food allergies.
- If box lunches are selected, a gatekeeper needs to be assigned to check lunch tickets.
- 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.
- 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.

When scheduling the meeting on a university campus some additional concerns include:

- Possible fees for security officers if alcohol is served or if large amounts of cash are on hand.
- Permission to sell books needs to be obtained from the campus bookstore to ensure the books sales will not compete with the campus book store.
- Cash bars are not allowed. A donation can be asked for drinks.
- Consider involving a student organization to sponsor the event, this will reduce fees and facilitate publicity.
- A university facility member sponsor is required to ensure the event is affordable.

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 one of the speakers agrees to give a workshop on the Sunday or Monday after the meeting, obtain the details for this as early as possible to ensure a facility can be arranged and the event can be publicized with the other Annual Meeting information, 3 months before the event.
- If you have a theme for your Annual Meeting, be sure your speakers are aware of it.
- Ask each speaker to as soon as possible 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 three months prior to the Annual Meeting. It may be necessary to discuss the abstract with the speaker over the phone, take notes, and draft an abstract for their review.

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 20-60 minutes. A variety of times helps keep the audience interested. Allow 10 minutes between speakers 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.

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 for 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.
- Having a time keeper is really helpful for the speakers.

4. Coordination with the Rare Plant Technical Committee for the Rare Plant Symposium

Set up for this Friday meeting requires a room large enough to accommodate 100 people. Book sales are not typically available for this meeting.

- Four tables are needed as follows:
 1. On-site registration for CoRPTC Meeting & CONPS Annual Meeting
 2. Pre-registration table with pre-printed name tags
 3. Literature for display
 4. Refreshments

5. Coordination with Book Sales

- Book sales utilizes as many as 12 tables.
- Two additional tables are set up for the Book Sales Cashiers.
- Silent auction items and plant sale utilize 10 additional tables.

- Arrangements need to be made to enable the people working in the book sales to listen to the speakers, either by closing the book sales during the program or placing the book sales in the same room with the speakers.
- If possible, have a representative from the Books Sales Committee review the facilities well in advance of the meeting.
- An extension cord may be necessary to connect the electronic equipment used for book sales with an electrical outlet.

Payments for all books, auctions items and plants are handled by the book sales cashiers.

6. Publicity

- Update CoNPS website 6 months prior to the Annual Meeting with the dates of the event and a list of the speakers. The exact location 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 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.

7. Field Trips

- Secure field trip leaders and locations at least 7 months prior to the Annual Meeting.
 - 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.

- A field trip table should be set up at the Annual Meeting so that attendees can check to see what field trip(s) they are on and register to participate in car pools. If possible the car pools should take off from the same location. If this is not possible, the departure location of the car pool should be listed on the sign up sheet for the car pool. The release form should also be signed at this time for field trip participants. A sample car pool registration form is attached to this manual as an appendix.
- A list of local gardens in the area needs to be included so that conference attendees can visit these gardens on their way to or from the annual meeting. Garden tours are not recommended to be included as field trips.

8. Registration

Registration forms from previous Annual Meetings can easily and quickly be modified for each new Meeting.

- Have only one person to handle all registration forms and calls and use only one spreadsheet.
- On-line registration and payment have proved to be time and paper-saving in the past, and we are currently arranging for payment through Paypal online for future annual meetings. A spreadsheet should be developed to deal with all the data that will come in from the registration form.
- Allow people to pay at the door and register online by filling out the registration form and emailing it to the person in charge of registration.
- The registration form should request all the information needed for the Annual Meeting:
 - field trip preference
 - lunch and dinner preferences
 - car-pooling needs, etc.
 - lunch selections should be numbered (i.e. 1-4) to make management of the spreadsheet easier
 - field trips should be assigned on a first-come, first-served basis
- All those requesting carpools to the Annual Meeting should be sent the name, address, phone, and email of all others asking about carpools. They can then arrange the carpools on their own.

From the spreadsheet several items will need to be printed:

- 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. The font on the name tags should be large so that it can easily be read from a distance of 2 or 3 feet.
- Rosters of participants in each field trip
- Lunch ticket
- Several copies of the spreadsheet (alphabetized) should be printed to check-in people at the Meeting.

Specify a final date for online and mail-in registration to be received; this is typically no later than about 7-14 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 pay online; let folks know that this saves the planning committee much time and saves paper, postage, etc.

- Establish a refund policy. Generally this is “50% refund 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.
- Registration tables should be set up at the Annual Meeting as follows:
 - (1) On-site registration & pre-registered but not paid
 - (2) Pre-registered and prepaid, with name tags
 - (3) Field Trips
 - (4) Two tables for the ‘Board of Directors Biographies’
- A registration table also needs to be set up on Friday morning at the Colorado Rare Plant Symposium for the CoNPS Annual Meeting registration, and should remain during the evening social.
- Locking cash boxes should be provided for the on-site registration volunteer and for the book sales. Check with CoNPS Admin Asst.

9. 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:

- The computer and projector cannot communicate.
- The memory storage device (flash drive, disk, etc.) won’t work on the computer.
- The presentation was developed on a Mac and the meeting uses a PC.
- The file sizes are too large for the memory of the computer.

These and other problems can be avoided by doing several things:

- 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.
- The planning committee person running the laptops should practice using the computers in the Annual Meeting room.
- 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.
- Speakers should give their presentation to the media person no later than the day before the presentation so that it can be loaded on the hard drive and checked for proper functioning.

- 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.
- There should be two computer projectors in case one fails.

10. 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:

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

11. After-Meeting Tasks:

- Be sure all bills are presented to the CoNPS Treasurer for prompt payment.
- 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.
- 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.
- Add comments to this Planning Manual.