

# Annual Meeting Planning Manual

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This Manual is meant to assist in the planning of annual meetings. The Manual was compiled by Al Schneider with input from many native plant society annual meeting planners and from on-line planning manuals.

This Manual may be freely used by anyone. Please acknowledge the source: “Written by Al Schneider, [www.swcoloradowildflowers.com](http://www.swcoloradowildflowers.com) “.

Please update the Manual each year with lessons learned so that future planning runs even more smoothly.

## Overview

### Function and Time of the Meeting:

The Annual Meeting is a significant event, a time for members to get acquainted, to learn about flora, and especially to be invigorated by social and intellectual exchanges. The local chapter should establish the best month for its meeting, probably at the height of the local wildflower season.

### 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 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. Details should be published on the appropriate web site as soon as they are available.

**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.

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

### Role of the Annual Meeting Planning Committee:

- 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 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) Establish and stay within a budget.
- 11) Take care of post-Annual Meeting tasks.
- 12) Recheck every one of the above details months and then again weeks before the Meeting.

## Details About Planning The Meeting

### 1) The Committees

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

Publicity

Accommodations, including campgrounds, motels, RV parks, etc.

Registration, including the following:

A) creating and maintaining the registration 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, 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 members donate homemade sweets and bring in fruit, veggie, and cheese trays. The cost of using a facility that requires using caterers is often quite high, much higher than costs when folks bring in their own food or pick a caterer.

Be aware that even if you are allowed to pick your 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 150-200 people,

have sufficient tables and chairs (with the setup fee included or known),

have security for locking up the book sales room,

have room for silent auction and sales items,

have display room if there are to be poster sessions,

have various options, such as, Internet connection, computer projector, lectern, coffee/tea pots, catering kitchen.

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

Check on the availability of a cash bar (and any charges for it) in the room for the 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 for speakers and photo shows.

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.

This same person might function as the timekeeper. Speakers need to be told when 5 minutes are left and then stopped when no time is left.

It is best to keep the meeting facility near motels and restaurants to reduce the environmental impact of driving.

It may be best to obtain a facility with a kitchen that can make lunches and suppers (on non-disposable, re-useable plates).

Be sure to arrange for recycling as much as possible.

Lunch for the main day of speaker presentations should be provided. 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. The banquet provides attendees another time to socialize and to learn about 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.

Be sure to include the cost of the banquet as an option for those spouses or friends who would like to attend the banquet but not the other annual meeting functions.

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 to read every word of the contract before signing.

### **3) The Speakers**

Obtain speakers at least 8 months in advance. If possible, before asking someone to speak, get the opinion of 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 newsletter, approximately 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 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?

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 your responsibility to make sure the audience can hear what is being said, so have someone roam the room to see if each presenter can be heard. This room roamer must be brave enough and forceful enough to go up to any speaker and adjust the microphone and remind the speaker (before and during their talk) to speak up loudly into the microphone.
- d) Speakers need to be told exactly how long their presentation is to be and it should be made clear to the presenters that they only have the set amount of time. Have a time-keeper who lets them know when they have 5 minutes left and then stops them at their given time.

Get a firm commitment from your speakers and call/email them several times to re-confirm.

Give your speakers a contact name and phone number of a person 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 newsletter before the deadline for each issue.

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 10-15 to reduce environmental 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 a trip 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 the newsletter 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) and trips should be assigned on a first-come, first-served basis.

## **6) 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 for trip leaders and 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 may 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.
- 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 flora and the environment, we should do everything possible to keep from spoiling that environment. During the planning and conduct of the Annual Meeting we should strive to reduce our impact in at least the following ways:

- A) Encourage participants to bring their own cup (and maybe utensils, plates, cloth napkin, etc.) to the Annual Meeting.
- B) Find caterers who 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. Everyone can obtain the latter on-line. Give a web address instead of a brochure.)
- 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 should be given 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 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.
- C) Be sure to have someone available to take care of comments and problems in the weeks after the Meeting. For

instance, there are commonly questions about un-cashed registration checks, lost items, and other Meeting details.  
D) Add comments to this Planning Manual.