Pacific Northwest Chapter of the Medical Library Association, Inc.

ANNUAL CONFERENCE

PLANNING MANUAL

This manual has been written to help you organize, plan and manage a successful annual meeting for our chapter. To keep this manual as helpful as possible, revision should be made, when necessary, following each annual meeting. Revisions to this manual should be given to the Chair, Conference Planning Committee.

Revised November 2004

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SUMMARY OF IMPORTANT NOTES BEFORE YOU START

1. Meetings rotate between Portland, Seattle, and sometimes Vancouver, BC. PNC/MLA members in the upcoming locales need to begin advance planning a minimum of 3 years prior to hosting the meeting.

2. Call or write the PNC/MLA Executive Board extending an invitation to meet in your city. This must be done at least 3 years before the actual date of the meeting. The formal invitation to the membership is given during the Chapter Business meet the year prior to your meeting.

3. The local hosting group should select an annual meeting committee with a chair. The PNC/MLA/MLA chair-elect will serve as a member of the annual meeting committee during the year in which they are chair. The Annual Meeting Committee Chair reports to the PNC/MLA/MLA Executive Board.

4. Once the invitation has been accepted by the PNC/MLA/ Executive Board, book the hotel. Make tentative reservations for at least 3 days (one day for continuing education and two days for the program). Including a Saturday to reduce plane fares is no longer necessary

5. Do not schedule the meeting during the Canadian Thanksgiving or on Rosh Hashanah.
6. Exhibits should be scheduled for one day only and given maximum exposure.

7. Major speakers should be approached one to 1 1/2 years before the meeting date.

8. The meeting is usually held in September or October.

9. Use the Annual Meeting Timeline to keep you on track.

I. Annual Meeting Committee

The objective of the Annual Meeting Committee is to provide the PNC/MLA/MLA membership with an annual meeting that includes continuing education courses, business and committee meetings, keynote speakers, a variety of exhibitors; and opportunities for social interaction.

The Annual Meeting Committee will select a chair and create as many subcommittees as necessary. Continuing Education is coordinated by the PNC/MLA Education Committee, with a local liaison. The Conference Planning Committee is tasked with reviewing hotel contracts, and answering logistical and planning questions.

A. Composition

Choose capable people, most of whom live in the same general locale (exceptions are noted). Having at least 5 active members and possibly as many as 8 for larger meetings is recommended. Meetings held outside the major cities may have fewer people involved but they should consider networking and including colleagues from other states or provinces.

B. Responsibilities

The Annual Meeting Committee must address the following issues (in approx. chronological order):

1. Secure a facility in which to host the annual meeting.
2. Publicize annual meeting.
3. Develop a website for the meeting.
4. Develop program for meeting.
5. Plan social events surrounding the meeting.
6. Arrange for exhibitors.
7. Develop a budget for all conference expenses.
8. Prepare pre-registration packets.
9. Prepare meeting packets.

Other possible meeting content ideas *may* include round tables, poster session, state meetings, RML functions, day care, and contributed papers. Other tasks that may be delegated include audiovisual coordination, registration desk scheduling, sign preparation, and creating a restaurant guide.

Professional meeting planners charge hourly rates. Professional decorators, those who handle exhibits, charge a service fee for each booth. Some professional entertainment planners work on a commission basis from the hotel and usually do not charge additional fees. In general, PNC/MLA meeting planners have **not** used outside professionals when planning the annual meeting.

C. Meetings

It is recommended that during the initial planning period, frequent (every 2 to 3 weeks), short (1.5 to 2 hours) meetings be held. This is necessary to get all the various duties assigned and to keep on task. Monthly meetings or even contact by phone or email will be enough until shortly before the meeting, when activity peaks again and face-to-face meetings may again be necessary.

D. Records and Reporting

An Excel spreadsheet listing common budget items and a final report template is in the appendix. Regular verbal and email reports are expected by the Executive Board during the planning phase. All financial documents and bank statements must be sent to the PNC treasurer so our complete books can be audited every three years.

E. Calendar

Timetables vary depending on the size of the group, season and facility used. This timetable has been prepared for meetings being held in the larger cities within our region. For smaller communities, you can usually shorten the timeline.

It's very important to prepare your own meeting calendar to mark deadlines. It's a great way to prevent details from slipping through the cracks.

24-36 Months Ahead **Target Date** **Completion Date**

- Select a hotel or conference center
- Review plans with PNC/MLA Executive Board
- See the facility (site inspection)
- Book meeting, banquet, and sleeping room space
- Prepare preliminary budget (See Appendix ??)
- Negotiate with and obtain contract from facility
- Send copy of contract to Conference Planning Committee (CPC) Chair for review
- Obtain signed copy of contract from facility and send to PNC/MLA Executive Board liaison for signature.
- Send meeting location and dates to Publications Chair
- Program development begins

12-18 Months Ahead **Target Date** **Completion Date**

- Determine theme of meeting (themes are not required but often unify the meeting content)
- Begin search for speakers
- Plan business and social agenda
- Review plans with PNC/MLA Executive Board
- Update Publications Chair so PNC/MLA website can be kept current

9-12 Months Ahead **Target Date** **Completion Date**

- Get signed contracts from speakers, including AV/computer equipment needs
- Review program with facility
- Post details on meeting website
- Announce meeting at PNC meeting one year in advance
- Review plans with PNC/MLA Executive Board

6-9 Months Ahead **Target Date** **Completion Date**

- Review A/V needs; obtain equipment or advise facility. Proxima projects may be available from the RML or other colleagues. Renting these items can be very expensive.
- Review program with principals
- Revise specifications with facility as necessary
- Refine budget
- Establish conference fees/ CE course charges
- Update website with additional content

3-6 Months Ahead	Target Date	Completion Date

- Select menus
- Confirm special events
- Print preliminary agenda / registration forms
- Mail registration packet
- Update meeting website

4 Weeks Ahead	Target Date	Completion Date

- Review facility banquet event order - select final food and beverage requirements
- Review program with all speakers and presenters
- Finalize agenda
- Print final program

2 Weeks Ahead	Target Date	Completion Date

- Prepare meeting packets
- Print meeting evaluation form, create SurveyMonkey version
- Prepare signs
- Print roster of attendees & exhibitors
- Print name badges (delay printing rosters and name badges as long as possible since registrations continue up to and including the day of the conference)

Day Prior to Meeting	**Target Date**	**Completion Date**
• Walk through the program at meeting site		
• Review all setups, including registration area		
• Review rooming list with front desk		
• Have pre-conference meeting with all appropriate personnel. If the Conference begins on a weekend, make sure you talk with **both weekend** and **weekday** staff)		

Annual Meeting Chair Responsibilities (from the Responsibility Manual updated in 2004)

- Identifies goals and objectives of committee.
- Develops and maintains policies and procedures with deadlines for functioning of the committee.
- Facilitates communication to Executive Board through Chair of PNC/MLA for committee's work and seeks approval of program plans.
- Prepares budget and fee schedule for approval by Executive Board 1.5-2 years prior to Annual Meeting. Annual meetings should break even; $2,500.00 profit is needed to keep the organization solvent.
- Selects committee members, establishes sub-committees and assigns sub-committee chair as needed.
- Develops program for meeting.
- Publicizes annual meeting.
- Arranges accommodations for meeting.
- Reminds the PNC/MLA Chair to invite MLA President or President-Elect to annual meeting by the beginning of June
- Coordinates peripheral events surrounding meeting and oversees all activities of the meeting.
- Prepares registration and information packets.
- Arranges for exhibitors.
- Sends the revised the Annual Conference Planning Manual to the Conference Planning Committee chair.
- Coordinates sub-committee work. Informs Executive Board of meeting progress. Evaluates annual meeting.
- Prepares written report (including financial statement to Treasurer) to Executive Board by November 15th. Submits summary to Publications Chair.
- Designates person to take charge of fund borrowed from PNC/MLA to begin annual meeting expenses.

Normally, the Chair resides or works in city where the meeting will be held to minimize the cost of communicating with hotel and local suppliers. In addition to the items list above, the Chair should send thank you notes or gifts to speakers, and acknowledge special services from suppliers.

II. Hotel

A. Factors to determine when choosing the hotel.

- Location
  - The meeting normally rotates between Portland and Seattle.
  - In the past, meetings have alternated between downtown locations and resorts.
  - Given the goal of making $2500 after expenses, resorts should be used with caution.
  - Non-major cities are considered when the treasury is healthy, since they have great difficulty making the needed profit.
- Guest rooms
  - What is the capacity of hotel to handle conference attendees, guests, speakers, and exhibitors?
  - What is the number of booked guest rooms needed to waive meeting room charges?
- Conference rooms
  - Size and number of meeting rooms.
  - Size of exhibit space and whether it is near the primary meeting space. Overnight security for vendor equipment? Technical capabilities (including availability of IT staff during entire meeting)
- Meals
  - Restaurant facilities within close proximity to hotel or within the conference hotel.
  - Are any or all conference meal functions required to waive meeting room charges?
  - Communicate to members if meal functions are a requirement to keep overall costs down.
- Billing procedures
  - Does the hotel require a deposit in advance of the conference?
  - What costs will be waived if meal functions are included?

B. Hotel Contract

A preliminary program is needed to project meeting room needs. In 2004, 20 guestrooms were reserved for the CE day and 50 guestrooms for a program day. Late registrants had to find rooms elsewhere. Most people check out on the final day of the program. Consider extending the meeting rate for the three days prior to and following the meeting. The Conference Planning Committee chair must review the contract. The contract must be signed by an Executive Board member. Negotiation assistance by CPC members is available.

The following items should be reviewed, and when applicable, included in the final contract. All costs are for the dates of the meeting.

- Verify guest room block dates
- Verify number of guest rooms reserved.
  - Consider attendance in proportion to location for past several meetings when determining this number
- Verify if any guest room nights or suites will be complimentary.
- Verify guest room rates.
- Verify meeting room rates, including set-up, draping for tables, IT capabilities and support.
- Will security be needed for exhibitor area? Can it be provided?
- Electrical or phone line requirements of vendors and speakers – charges?
- Verify catering charges, including no-host bars.
- Determine catering requirements and restrictions of the hotel. Hotels require using their catering services.
- Obtain menus with catering prices for food events: breaks, welcome reception, breakfasts, lunches, and the banquet. Other charges will need to be figured to develop conference budget.
- Provide a map of exhibit space to the hotel so they can obtain their fire marshal's approval

C. Meet with hotel representatives (1 month preceding the meeting date)

Walk through the entire meeting step by step with catering department and other appropriate hotel representatives, discuss the following in detail: This was not done in 2004 and it caused many problems that could have been resolved. Even if the annual meeting planning members are offsite, this walk-through **must** be done.

- location of the registration desk
- location of restrooms
- location of hotel restaurants and their availability to attendees
- meeting rooms
- food events: coffee breaks, Welcome reception, Banquet, etc.
- electrical or phone line requirements of vendors and speakers
- audiovisual / IT equipment requirements and availability of support staff
- lighting requirements
- parking facilities
- names/numbers/schedules for technical assistance and catering personnel for every day of the conference
- copier access and cost, if charges
- billing or payment arrangements
- contact information for catering questions
- contact information for facilities questions

III. Annual Meeting Program

A. Develop a theme

Typically this is done through brainstorming and generating ideas. Factors to consider include: speaker quality, relevance/interest/program theme, and different library constituencies: hospitals, academic, society, biotech, and public. Try to make the meeting interesting to all members. We also have members in the U.S. and Canada so country-specific topics should be kept to a minimum. Is there an overall theme for the meeting or is it a potlatch?

B. Content

Options include concurrent sessions, poster sessions, roundtables, contributed papers vs. invited papers, research and/or student papers, panels vs. individual speakers. Topics can be library-specific or clinical or both. Consider presenter fees. Typically, most presenters offer their services for free.

C. Exhibitors

Exhibits are one day only. This has been the indicated preference by the exhibitors themselves for a meeting of this size. Vendor booth fees are a significant financial support. Every attempt should be made to build time between vendors and librarians.

1. Make sure exhibit space is in a convenient location to the meeting spaces.
2. Make sure there is adequate set up time, security, and accessible storage for vendor pre-conference shipments.
3. Make sure the facility technical support person(s) is available to vendors during the set up time.
4. Leave enough time for interaction, either in one or two large blocks (at least 1 hour) or have long coffee breaks (30 min each)

5. Traditionally, a lunch (usually a box lunch) is planned with the exhibitors on the day of the exhibits. Though people may just go pick up their lunch and leave many will take the opportunity to squeeze in more time with the exhibits.

6. Include a list of vendors, with contact person and address in the meeting packet.

D. Speakers

1. Keynote, usually one hour. 45 min for talk, with time for questions / answers / discussion. [optional]
2. Clinical [highly desirable]
3. Research, especially student research (Highly desirable)
4. Other invited [optional]
5. Banquet Speaker [Undesirable based on member feedback]

E. Chapter Business meeting

1. 2 hours (minimum). Three hours is desirable.
2. Early on last day (never at end of the last day!)
3. Door prizes to encourage attendance have been given.
4. Speakers should give name and place of work.
5. Printed versions of motions to be considered / voted on should be included in the meeting packet whenever possible.

F. Contributed / Invited Papers

1. One hour for 3 or 4 papers

G. Round Tables

1. Allow 45 minutes per session, can run same session twice.
2. Ask membership for topics
3. Include a facilitator and note taker at each table.
4. Share findings with membership via the meeting website.

H. Banquet

As the meeting is only three days long, the banquet is usually on the evening of the second evening. This is an optional event. The 2004 event was poorly attended.

Traditionally, much effort is spent on this function. In reality, members just want to have good food and a time to socialize with one another. Anything that reduces their ability to talk to each other is viewed negatively. Loud music and banquet speakers fall into this category. No host bars lose money.

I. Welcome Reception

Usually held the first night of the meeting. Members have come to expect that there will be enough food that they won't need to plan for dinner. Desert food (with the function starting at 8pm) was tried. While many members enjoyed this idea, others did complain about the lack of "substantial food." A no-host bar is usually how alcohol is made available, however, we have lost money each time this has been tried. Some years, vendors have picked up the cost for one free drink. The 2004 committee suggests that eliminating the banquet would save money.

J. Continuing Education (CE)

Usually held the day before the meeting begins. Consider a half-day class on the closing day if the program ends at noon. Offer both full-day and half-day courses. CE is coordinated by the Professional Development Committee of PNC/MLA, Inc. A member of the local planning committee is a de facto member of the Professional Development Committee during the year in which their meeting is being held.

K. Lunch

Leave at least 1.5 to 2 hours for lunch Adjust this time if necessary Make sure the tables aren't too crowded (8 is the maximum for most round tables).

L. Other Considerations

1. Expect to get requests from any or all of the following: State Groups
   MLA update, RML update, PNC Officers, and PNC committees. Contact them early in the planning process to determine their needs.
2. Exhibitors requesting training/presentation time. Will it fit the theme? Is there an open time?
3. During the conference designate one person as Catering Liaison. They will:
   a. advise catering of any changes in meal counts throughout the day.
   b. check with catering 15 minutes before any coffee break and 30 minutes before meals to make sure that all is according to plan.
   c. collect meal tickets if hotel staff does not collect for their purposes.

IV. CONTINUING EDUCATION

This is a responsibility of the Professional Development Committee. The Annual Meeting Committee is expected to have one of its members sit on the Professional Development Committee during the year the meeting is being hosted in their location. This person is often asked to handle local arrangements and coordinate logistics during the days CE is held. The following is included in the manual for the liaison - as an overview of the steps usually taken to select and offer courses at the annual meeting.

A. SELECTING THE C.E. COURSES (January - March)

1. Obtain list of MLA CE courses and a list of instructors approved to teach them.
2. Survey local resources for other courses that might be offered (including SLA and other professional
3. Examine results of annual PNC/MLA/MLA Continuing Education Needs Assessment survey.
4. Check with Executive Board to ensure that any overall goals of chapter regarding continuing education will be met.
5. Select several courses to be included in poll of PNC/MLA/MLA membership. Include a complete description of each course on the final list.
6. Poll membership either via electronic mail or through Northwest Notes: include instructions for respondents, and allow them to choose at least two courses.
7. Tabulate and publicize results of poll.

B. CONFIRMING SELECTIONS (April)

1. Contact instructors by telephone to assure availability and agreement on presentation date(s). Ask about honorarium, facilities, materials and equipment requirements, cancellation policy and other services needed.
2. For instructors of non-MLA courses, explain that a course description and list of educational goals and objectives will be required as well as a course outline including time allocation.

3. Confirm all arrangements and dates in writing.

C. BUDGET (April, May)

1. Develop a C.E. budget for each course. Include travel costs, honorarium(s), equipment charges, room rental, coffee breaks, lunch (if one is to be included) and purchase of any course materials (e.g., MLA syllabi). Some of these will have to be estimated.

2. Determine charge for each course, and establish a minimum number of participants for which the course will be held (generally 12-15).

3. The size of classes is often determined by the room size available in the hotel, by whether it is a hands-on lab experience, and by the instructor's wishes.

D. CONTRACTS (June)

Prepare a written contract for each instructor, including all details of agreement and a date prior to which any cancellation (by either party) must be made. A sample contract is included in the appendix.

E. ADVERTISING (June-August/September)

1. Submit information to Communications Department at MLA Headquarters eight to ten weeks in advance (a form is included with the packet for sponsors). This will assure timely announcement in the MLA News.

2. Submit copy-ready "press release" information to Northwest Notes and other local newsletters (list of newsletters is in the appendix).

F. APPLICATION FOR MLA CREDIT (for non-MLA courses) (June/July)

While AHIP members may prefer that courses have MLA credit, not all courses will have this distinction. Courses should not be excluded simply because MLA credit is not "part of the package." The Professional Development Committee will assist instructors who wish to obtain MLA credit for their course.

1. Obtain application packet from MLA headquarters.

2. Obtain course description, goals and objectives, and course outline (time schedule) from instructor.

3. Complete application and submit to MLA along with items listed in #2, evaluation to be used, and a copy of any needs assessment done. Allow at least eight weeks for response.

G. WORKING WITH THE INSTRUCTORS (August - September)

1. Confirm equipment and seating needs.

2. Confirm class size and any other arrangements to be made.

3. Arrange for photocopying if needed. Costs are covered by the course fee or are borne by the instructor.

4. Order syllabi for MLA courses no later than 30 days prior to course. (Order plenty: extras can be returned for full refund).

5. Send contracts for instructors to sign and return.

6. Either provide hotel reservation cards and program information in time for them to self-register or book a hotel room for them before the hotel's deadline.

7. Mail any advance information required by instructor to class participants.

8. Provide instructors with class roster if requested.

H. HOTEL ARRANGEMENTS (One Month Before the Meeting)

1. Communicate class sizes, seating arrangements and equipment needs to local arrangements chair.

2. Arrange for coffee breaks. Bear in mind that food events are often booked as part of the hotel contract signed as much as two to three years before the meeting. Specifics can be handled a this later date.

3. Arrange for signage.

I. DAY OF CLASS

1. Have one member of committee or volunteer attend each course as a “monitor”, prepared to handle problems, do emergency photocopying, pass around attendance roster, etc.

2. Pass out evaluation forms at end of course. Give each participant a letter or certificate of completion when he/she hands in the completed evaluation. (see examples)

3. Remind participants that they must keep their own C.E. records (MLA does not keep individual records).

J. FOLLOW-UP

1. Tabulate evaluations.

2. Collect instructor expenses.

3. With Annual Meeting chair or meeting treasurer, reimburse instructors for expenses, including any honorarium charged.

4. The final instructor mailing should include their expense/reimbursement check; copies of their class evaluations, and a thank you letter.

5. Provide MLA with copies of evaluations and attendance rosters.

6. Send thank you letters to committee members.

7. Submit final report to Annual Meeting chair

K. GENERAL CONSIDERATIONS

1. Allow space on registration form for people to indicate their willingness to sign up for other C.E. courses if their first choice is full.

2. Make sure that instructors know whom to contact locally.

3. If possible, arrange to meet instructors at airport.

4. Designate someone to fill out letters or certificates of attendance while classes are in session, if this has not been done earlier.

5. Have a course registration sheet, blank course evaluation forms and blank certificates of completion prepared in advance of C.E. day.

V. EXHIBITS

A. Select the meeting hotel with the exhibits in mind. Many smaller hotels may not have two rooms large enough for the main meeting room and the exhibit room.

1. Space for 10+ exhibitors. Normally each exhibit space is either 8x8 or 8x10.

2. Must be easily accessible with high visibility.

3. Must be secure if exhibits are left overnight or hire security. Exhibits are held on the first full day of the meeting. Most exhibitors prefer to set-up and tear-down their booths on the same day. Some vendors want to set up the night before. Hiring security is normally not an option due to cost.

B. Select a decorator

If the hotel does not handle exhibits needs, consider a decorator. If a decorator is required, the hotel will suggest one that they work with regularly.

C. Establish fees

Exhibitor fees and CE fees are the revenue for the meeting. Creating a positive experience for the exhibitors is critical so they will continue to support PNC meetings. Invite them to attend program sessions.

1. Does the hotel charge for exhibit space, tables and/or draping, power, phone line(s) or Internet connectivity? Will IT staff be available, and if so, is their a separate charge for their services?

2. The basic exhibitor package includes a table, one or two chairs, and one box lunch if a “lunch with the exhibitors” is planned. Fees in 2004 were $350 for one draped table and $275 for a second table before July 1. After July 1, rates increased to $425 for one table and $300 for a second table. Phone lines and other costs are over and above the basic exhibit fee.

3. One exhibitor per company is the norm. Additional people need to pay for food events (lunch, banquet and welcome reception). Include a “meals” option in their mailing.

4. Consider complimentary social activity tickets for those who sponsor breaks or other meeting events.

D. Possible Exhibitors

Make up list of possible exhibitors (at least one year prior to your meeting). **Contact early**. Always consider local vendors, new vendors, and program presenters.

1. Contact previous PNC/MLA/MLA exhibitors. Hand out invitations during the meeting prior to your meeting. Even earlier contact can be helpful to make sure budgeting at the national office will permit their attendance at your meeting.

2. Add local firms and favorite vendors.

3. Find lists of other exhibitors at previous library meetings in your city.

4. Add possibilities obtained from the MLA exhibits.

5. A broad spectrum – technology, pharmaceutical companies, etc, should be represented.

E. Write initial letter and send preliminary registration

1. Provide a fact sheet with information about the meeting date, location, hotel, expected attendance from what areas, on PNC/MLA/MLA letterhead stationary.

2. Preliminary Registration Sheet

    - Include costs

- Ask for company name, representative name, name to put on sign for booth, special needs (electricity, phone line). Try to make contact with the local representatives as often information sent to the home office does not get to them.

- Ask for sponsorship of specific meeting events, give list of events with specific costs.

- Note if a decorator will be used.

F. Strongly solicit exhibitor sponsorships!!

- Exhibitors usually supply the annual meeting bags. These are expensive (approx. $500 for 100 bags). Ask for cloth bags (min. 13" x 14") w/ reinforced seams and an inner gusset (3" would be best). The cotton duck or sheeting should be at least 7 oz. Zippers and/or would be great. Poly web handles are desirable. Supply the conference logo so the bags can have the "conference look". Bags should be shipped to the Hospitality Chair, who is person responsible for storing, stuffing, and distributing them.

- One or more exhibitors usually cover the exhibitor lunch.
- Coffee breaks or wine/drinks for banquet or Welcome Reception are sometimes covered by exhibitors.
- Exhibitors can offer door prizes.
- Ask exhibitors what they would like to offer. (You might be surprised.)
- MLA traditionally offers a free membership for the upcoming year, but that is given to the PNC/MLA Membership Secretary to encourage membership renewals and not used at the conference.
- Remember to acknowledge all sponsorships on the website and in the program. Send letter of thanks after the conference.

G. Update the vendor database continuously

1. Include current representative names and both email and street addresses.

2. Include notes about reasons they won't exhibit.

3. Share the database and updates with the Registration Chair.

H. Send a formal registration packet

They may wish to register for the meeting or social events. Include the hotel room reservation cards.

1. Contact unresponsive vendors.
2. Update database when changes occur.

I. Exhibit floor plan

Submit floor plan to the hotel 1 month prior to the meeting. The local fire marshal has to approve the floor plan. If a decorator is being used they will take care of this. Assign booth space to registered, paid vendors.

1. Put those who need power near the walls so extension cords will not drag across floor.

2. Leave ample room between exhibits.

3. Do not put competitors next to one another.

4. Give the "Choicest" locations with maximum visibility to the biggest donors.

J. Exhibitor Reminder

Two weeks before the meeting, make phone calls to exhibitors who have not yet registered to verify their intent and to any for whom you have questions.

K. During the meeting:

1. Have a meeting packet for each exhibitor at the Registration / Hospitality Desk. It will include a copy of the program, name bade, ribbon, any meal tickets, exhibit floor plan, and exhibitor evaluation.

2. Have someone in exhibits area early to help exhibitors set up, make sure they have name tags and have checked in, etc. Have tables labeled with exhibitors names and have floor plans handy for those who have forgotten them. Keep an exhibitor notebook listing all exhibitors and their registrations at the Registration Desk.

3. During the meeting, remind the group several times to visit the exhibits.

4. Make sure appropriate donor signs are up for coffee breaks.

5. If the exhibits need to stay up overnight, be sure security precautions are taken.

6. If exhibitors donate door prizes establish a drawing sheet where the attendees have to visit each exhibitor and have the rep. initial the sheet. This will motivate attendees to get around to all exhibitors.

L. Write thank you letters to all the exhibitors within two weeks of the meeting.

M. Notes:

1. It is important to start this process early since so many meetings are held in the fall and since many companies may budget 1 to 15 years ahead.

2. There is enough work involved in working with the exhibitors that one or two people should be assigned this task.

3. Personality traits: must be willing to ask for money!

4. Put food as far from the door as possible to encourage walking past the vendors.

5. Analyze the exhibitor evaluations and share results with future annual meeting planners.

VI. Publicity

A. General Considerations

Announce your meeting during the Business Meeting in the year prior to your meeting. Provide flyers, bookmarks, etc. listing the date, location, and theme. Include these items in the Meeting Packet.

1. Begin publicity as soon as dates and site are set. Send this information to the Publications Chair so it can be put on the PNC/MLA website.
2. Do more publicity after tentative program has been drawn up.
3. Do major publicity in May/June, right before registration packets are mailed.
4. Include program, complete with CE course titles and instructors in the registration packet and May/June publicity.
5. Use Hlib_NW to keep members informed of changes and additions as they occur.
6. Keep editorial deadlines in mind and send information to be published in newsletters, etc, at least one month ahead of time.
7. Work with meeting webmaster to present consistent information.

B. Logo/Graphic

Work with a graphic designer, if necessary, to design a Logo and color scheme. Design a small or simplified version of logo for use on name badges and bags. Provide logo files to Publications Chair and meeting webmaster for website, Exhibitor Chair for conference bags, and to Registration Chair for use on registration packet.

C. Printing

These items must be printed: registration packet materials, program booklets, signs, and name badges. Choose paper etc. to match color scheme, logo, and price considerations. Registration Chair will provide the content to be printed and list of names for badges. Printing will be done in the spring for the registration packet and then about 3-4 weeks before the meeting for the final program materials.

D. Signs

Welcome attendees with large, easy-to-read signs in bold, high-contrast lettering. Use uniform typestyles and color schemes to create visual images that become familiar. Use the meeting logo and colors. This "identity" for signage offers visual cues.

- Use clearly worded signs. Short statements (3-5 words) are easier to read than small type and extensive copy.
- Use positive language. "Please Use the Front Door" is much friendlier than "Do Not Enter."
- If the meeting will be on more than one floor, consider a building directory or map at the main entrance. The program also needs a building directory or map.
- Be sure signs are adequately lit.
- Studies (source unknown) have found that a single sign saying, "Go down the stairs and turn left" is actually clearer than a series of arrows attempting the same instruction.
- Helvetica-based typeface is common. So are: sans serif, Times New Roman or Stencil Bold.

1. Check with your hotel. They may be able to produce signs or can recommend sources. Ask for a sample of quality in advance. Supply conference logo to printer. Have signs delivered early enough so that you have time to double check spellings and ensure that all signs have been delivered.

2. Signs will be needed for:
   - Registration desk
   - CE Courses
   - Break and activity sponsors
   - Exhibitors (may be part of decorator contract)
   - Roundtables/poster sessions
   - Other miscellaneous group meetings

3. You may want easels for the signs. Check with hotel to determine if they supply easels (free or fee) or if they allow taping signs to the walls, etc. Be sure to bring painter's tape (blue) for removable mounting. Check to see if meeting rooms have sign holders outside the rooms and what size sign they hold.

4. Consider having signboards with schedule of what will take place each day in each room--these may need to be changed daily - probably in the morning before the conference starts.

5. If exhibitor tables are assigned, tabletop signs may be needed to let them know where to set up.

E. Ribbons

Discuss ribbon supply with Registration Chair and determine how many are needed. We usually supply ribbons for the name badges of: Planning Committee, PNC Board, Presenters, Exhibitors, First Timers, etc. Ribbons are printed and delivered to Registration Chair. Badge-holders and ribbons will be collected for re-use at the end of the Conference. Check the number and condition of those supplies before ordering more. Remaining ribbons are mailed to the next annual meeting chair.

F. Listservs

Take advantage of any listserv that potential attendees are likely to read: Hlib-NW, Hlabc, medlib, cannmedlib (especially when the meeting is held in Canada), and those for the California Chapters.

G. Newsletters/Other Places in which to publish information

1. PNC Blog and website
2. *MLA News*
3. State/Province health sciences library/network newsletters (list of newsletter names and editors given in Appendices.)

4. Any other relevant places you can think of

H. PNC Banner

The PNC Banner is a large [approx. 8' x 4'] nylon map of the PNC region with grommets. It should be mounted on the wall behind the podium during the conference (at least during the Business Meeting). After the conference, next year's Annual Meeting Committee should take it back with them. This eliminates a mailing charge.

VII Meeting Web Editor

One person should be assigned to create and update a meeting web site. The task includes:

1. Sending the meeting dates and location to Publications chair as soon as this has been determined.
2. Obtain necessary passwords and directions for access to the University of Washington server from the PNC web editor.
3. Create a "place holder" web page as soon as dates have been set.
4. Sections of the web site typically include:
   - Home Page (including graphic/logo, date, and location)
   - Preliminary Program (including CE, speaker bios, special events, business meetings)
   - Continuing Education Opportunities
   - Registration Form
   - Hotel information (remember to include parking costs!)
   - Logistics (including transportation information and driving directions)
   - Vendor Information (including contacts, contracts and fees)
5. Budget time during the two weeks before the meeting for "spontaneous" emergency last minute changes to the web site.
6. Consider using very basic design and formatting to facilitate easy download to PDAs.

VIII. Budget and Bank Account

PNC/MLA provides each annual meeting with $1000.00 seed money. The meeting treasurer first opens a checking account and then requests this seed money. This should be done as soon as deposit money is required. The PNC/MLA Treasurer can provide PNC/MLA's tax ID number. At some point the financial institution you are using for meeting accounts may request it.

Budget Planner

The meeting budget is an estimate of anticipated income and expense for your meeting and provides financial control and accountability. It's important to document how and why you arrived at all figures, so keep track of calculations used to arrive at each budgeted item. Allow contingencies for the unexpected. Reviewing last year's budget will give you a good basis for preparing this year's. And analyzing the difference between budgeted and actual costs will get you closer to actual expenses the next time.

Below are some expense and revenue items. Remember to add room tax, sales tax and gratuities where appropriate as this can add up to a sizable amount. You may wish to assign a series of account numbers to various expense and revenue categories to help keep similar items grouped together.

Set Conference Fees and meal charges. Make the all-inclusive conference fee (excluding Continuing Education) $5-$10 less than if everything was charged separately. This gives a slight break to those supporting all of the meeting meal functions. Many hotels require a certain percentage of attendance for meal functions to avoid meeting space charges. Meal numbers are important!

Include Welcome Event in all fee options.

Avoid plated meal menu choices. These cause confusion on the Registration form, at the serving time, and prevent us from registering last minute attendees.

Some organizations do not reimburse for meals. Consider pricing the Registration separately from food. For example, this would simplify the reporting for attendees receiving a Washington State Library Scholarship.

Set a flat rate meal price for vendors. Include this on the Vendor Contract, along with their table and AV/technology fees.

This Excel spreadsheet gives general guidelines as to normal categories.

Registration based on number of all-inclusive attendees	Overhead Costs	Overhead divided by # of attendees = Basic Event Cost	Cost of Optional Events	All Inclusive Fee

Expenses

Fixed Costs		
	Estimated	Actual
Registration		
Printing: prelim. program		
Mailing: Prelim program		
Printing: final program		
Printing: meeting attendees list		
Printing: name tags		
Tickets		
Misc. office supplies: name tag cardstock, badge holders, etc.		
AV and Computer Rental		
Overhead projectors		
Slide projectors		
LCD projectors		
PC		
VCR		
Microphone(s)		
Other: setup fees, etc.		
Welcome Reception		
Room Nights Penalty		
Speakers		
Honoraria		
Lodging		
Travel		
Thank You gifts		

Income

Registration Fees	
Extra meal/function tickets	
Vendor Sponsorships	
Vendor Fees	

Vendor Support

No. of confirmed vendors x cost / booth	
Additional sponsorship $	

Entertainment		
Bank Service Fees		
Discretionary Items		
Door prizes		
Banquet		
RML food event (breakfast or ?)		
Vendor Lunch		
Breaks		
Day 1, Break 1		
Day 1, Break 2		
Day 2, Break 2		
Day 2, Break 2		
TOTAL:		
Reimbursed Expenses		
PNC Board Meeting (cost pd from PNC budget)		
Room rental		
Food		

IX. REGISTRATION

A. Registration Function

1. Write and format content for all registration materials. (Work with CE and Annual Meeting Chairs to get class and program details.)
2. Submit registration packet files to web editor and to person responsible for printing.
3. Design registration form and meeting evaluation form. Work with Annual Meeting Chair, and others (CE, exhibits coordinator, and others to get prices, fees, menu choices, etc. to put on form.
4. Set up and maintain registration database. Get Excel Spreadsheet from previous year or PNC Membership file. See Appendices.
5. Create list of attendees and name badge file and send to person responsible for printing.
6. Create both new attendee information sheet and general email message to go with confirmation.
7. Create final program and send to person responsible for printing.

B. Introduction:

In 2004, only a brief registration packet was mailed. At the same time, the registration information included on the meeting website. The website included more information than what was printed for mailing. Send digital copies of all meeting information to the web editor for inclusion as soon as it is generated. This includes registration information for both vendors and participants, CE information, speaker bios, hotel information, local information, special events, and the like.

Print the final program within the last 2 weeks for inclusion in the meeting packets distributed at the meeting.

C. Registration packet and conference website include:

- Preliminary Program (Schedule and description of Presentations)
- Registration Information and Form
- Continuing Education Information
- Hotel Registration Form

1. Design the registration packet 6-9 months before the conference. Work with Program, CE, and others to get all the information needed. The registration form cannot be developed until Conference and CE Class fees have been determined and meal/special event structure is defined. Use the logo file and color scheme. Send completed pages to the meeting web editor as soon as they are ready.

2. The **preliminary program** should include a greeting and general meeting description, the program schedule, hotel information, speaker / presentation details and biographies, and CE class descriptions and instructor biographies. This is important for "selling" the meeting to administration when requesting funding.

3. Keep number of pages to a minimum to save on postage.

D. Registration Form:

1. Keep format simple and provide a PDF version for the conference web editor.
2. **Do not put a row of lines across the page anywhere!** People will want to cut across it and return only a portion of the registration form instead of the entire form.
3. Use white or light pastel paper for the Registration Form; colored paper can cause a problem when completed registration forms are photocopied.
4. Include the option for payment of current year PNC membership dues.
5. Include the following statements somewhere on the form:
   - Make check payable to PNC/MLA (all fees are payable in $US)
   - Return completed form to: (*name and address of registration chair*)
   - Will this be your first PNC meeting? ____Yes ____No
   - The planning committee will try to reasonably accommodate any special needs you may have related to attending the conference. Please let us know:______________________
6. Include meeting website URL on form.
7. Make the **all-inclusive conference fee** (excluding Continuing Education), five to ten dollars less than if everything was charged separately. This gives a break to those supporting all of the meeting meal functions. Many hotels require a certain percentage of attendance for meal functions to avoid meeting space charges. Specify what the all-inclusive fee covers on the Registration form.
8. Separate any Special Pre-Program events from the Conference Fee listings and make clear which events are included in the various Conference fee options.
9. Keep meal choices simple to avoid confusion and payment errors.
10. When the conference is open to other chapters, include a check box for them to indicate their current membership status. Offer them our member rates. Arrange with other chapter membership secretaries to verify their membership status.
11. Allow members who still need to pay current year's membership to send Membership Form and Payment along with meeting registration to qualify for meeting "member rates".

E. Hotel Registration:

If the hotel accepts printed registration forms, include one in the packet. If hotel only provides website information, write a brief description about the hotel, reference the website and provide any special instructions for registering for our meeting.

F. Mailing: (3 months prior to meeting)

1. Take registration packet materials to the printer. Buy envelopes. The quantity ordered should include extra copies for mailing to the exhibitors and to people who did not receive the original mailing. Add a few extra copies for updating this terrific manual (in 2004, 125 registration packets were printed).
2. Print mailing labels (use your registration database and add vendors, speakers, instructors, others).
3. Stuff packets and mail.

G. New Member Orientation Information

Write a brief description of the registration process and what to expect when attendee arrives at the meeting venue. Give location of Reception Desk, description of what Attendee will receive at Reception Desk, overview of how our pricing structure works i.e. CE Classes are priced separately from Conference Fees. All-Inclusive generally includes most meals/special events. Make this available in print and as an email message.

H. Registration Process

I. Receiving forms and payment

a) Record receipt of money and class, event, meal choices. Also note special accommodations and ribbon or badge requirements. Clearly mark on Registration Form "paid" and date.
b) Send email confirmation to registrant as soon as possible. Include amount paid and events/options selected. Offer an alternate class if a desired CE class is full or has been cancelled, or provide a refund. (see sample in Appendices)
c) Make two copies of registration form and one copy of check.
d) Staple the check to the original registration form and file in a 3- ring binder.
e) Include one copy of registration form in the individual's meeting packet.
f) -Send the second copy of the registration form with their check to conference treasurer.
g) Sometimes registration forms arrive but NOT the money. This normally occurs when the fees are paid by the institution. If registration fees have not arrived two weeks prior to the meeting date, call the participants explaining the dilemma.

II. Organize the data

a) <u>Notebooks only</u>: A 3-ring binder will lie flat, allowing use of both pages to maintain registration information. Include: the original registration forms and check copies arranged in alphabetical order, a class roster for each CE class, and a list of registrants for each meal/function. Record names and numbers for each. This notebook will be used at the Registration Desk during the conference.
b) <u>Database or Spreadsheet and Notebook</u>: A database or spreadsheet program allows data manipulation, production of lists, and preparing mailing labels and/or name badges. Fields: Last Name, First Name, Institution, Address, City, State, Zip, E-mail Address, Member (if joint meeting which chapter), Type of Registration, Continuing Education Classes, Meals, Functions, Amount Paid, Check/PO Number.
c) Coordinate with other committee members.
    a. -Continuing Education: Need to know class size limitations. If there is a waiting list for a class, limit it to 2-3 people. Send an updated/final class roster of each class as needed.
    b. -Facility Arrangements: Supply the total number of conference registrants, meal/function registrants, CE registrants, and any other relevant numbers.
    c. -Conference Treasurer: Make a copy of all checks/Purchase Orders (attach them to the registration forms) before sending them to the Annual Meeting Treasurer.

I. Programs, Badges, Event Tickets, and Ribbons

The Registration Chair or designate is responsible for the text on the tickets, badges, and official programs, obtaining packet favors and coordinating the stuffing of the packets. <u>Check spellings carefully!</u>

1. Final program: determine time needed to get published. Print as close to deadline as possible to allow for last minute changes.
2. Ribbons: Review existing quantity and order needed supplies. Timeline is based on local printing deadlines.
3. Badges:
    a. Include Name, Institution and City/State or Province on the badges.
    b. Use the Registration files to generate the list.
    c. Print as close to start of conference as possible. If these can be done in-house, you have the flexibility to add late registrations right up to the meeting time.
    d. <u>Check spellings carefully</u>!
    e. Print some blanks to be used for last minute changes.
    f. Put only Company Name on Exhibitor Badges. Let the representative who actually comes to the meeting fill in their name.

4. Event Tickets: Print any time after events are firm. Use a different color for each and try not to make the individual tickets too small.

J. Meeting Packets

Solicit Meeting Packet favors anyone you can think of: the host hotel; local businesses and organizations within the conference, City and State; organizations such as NN/NLM, MLA, SLA, and WMLA; hospitals; visitors and convention bureaus; exhibitors; and others. Favors may include: pens, pencils, maps, brochures, samples, magnets, or other favors with their advertising on them. Contact possible sources early. About six weeks to a month before the conference, collect the favors and begin assembling them. <u>Make sure that a pen and pad of paper are included!</u>

Decide how to handle the favors. If meeting in the city where you work, it may be easier to stuff the conference bags with these favors in advance. The Meeting Packet manila envelopes don't hold bulky items well and take up too much room when stuffed too full. Another option is to hand out the favors or leave them sitting out for people to pick up at the Registration Desk, if they want them. Consider the size of the Registration Desk before making up your mind.

Stuffing packets takes 3-4 hours for a group of at least 4 people. The stuffing party usually takes place one week prior to the conference. Label each individual's manila envelope with their name and institution (use name badge file) to create labels. The meeting packet contains:

-small envelope with event tickets (you may want name labels for these)
-name badge holder
-name badge
-any appropriate ribbons
-copy of registration form
-final program
-annual meeting evaluation (Exhibitors will receive the exhibitor evaluation.)
-invitation to next year's Annual Meeting (Get this from next year's Annual Meeting Committee Chair.)

Provide a Meeting Packet for each exhibitor, whether or not they "register".

K. Cancellations

Standard policy for meeting cancellations is: "Acceptable reasons for last minute cancellations include a death in the family or a drastic change in the work situation". A refund of a percentage of the meeting costs (minus a small service fee) may be given in such cases.

L. Words of Wisdom

- -Don't do it all alone!
- -DELEGATE, DELEGATE, DELEGATE!
- -Don't leave things until the last minute, there is too much to do.
- -Do not expect the web editor to "put something up on the website about X" at a moment's notice. Send electronic content that says exactly what you want it to say, and give as much lead-time as you can.
- -No matter how far ahead you send out the registration packets, someone is going to register for the conference at the door.
- -If there is a way for someone to misinterpret the registration information you so carefully provided, they will -- guaranteed.
- -SMILE!
- -You'll get by with a little help from your friends and you'll make new ones through this experience.
- -Meal tickets are problems. If the hotel does not require them, ignore them. With a plated meal it is relatively easy to count heads. A buffet meal is more difficult to count, but it is easier to insert a walk-in.

X. Registration Desk / Hospitality Coordinator

The registration desk also serves as our hospitality desk. Locals often help staff the desk.

1. Assign someone to be in charge of the registration/hospitality desk. He/she should prepare a schedule of registration times and enlist helpers to staff the desk. Limit time to no more than two hours at a time, if possible. A few days before the conference, confirm the scheduled dates and times with all designated helpers.

2. Provide training for the first desk helpers and have them train the next group. There should be a simple, WRITTEN set of instructions at the desk for helpers to follow and a designated contact person in case of a problem. This is very important, because conference participants, vendors, and hotel staff will all treat the Registration Desk as an information desk.

3. Have the conference bags at the Registration Desk long before it opens. Arrange a place to store them when the Desk is not open and a means to transport them to and from the Registration Desk.

4. Coordinate with the Registration Chair, who will provide a notebook with: the original registration forms and check copies arranged in alphabetical order, a class roster for each CE class, and a list of registrants for each meal/function.

5. Some items that should be available at the Registration/Hospitality Desk include:

-The notebook with the original registration forms
-Meeting packets
-Telephone (optional, depends on cost)
-Blank name badges
-Tickets for events
-Blank registration forms, annual meeting evaluations, and exhibitor evaluations
-Pens, pencils, paper, stapler, staples, scissors, blue carpenter's tape
-Marker pens for name tags (some sites may provide special typewriters)
-Unlabeled folders/packets
-Local maps, tour books & brochures

XI. Technology

Technology is an assumed part of Conferences these days. Hotel staff should handle most of the details. The Exhibitor Chair should have negotiated any technology support needs for the exhibitors. The CE Chair should have negotiated any technology support needs for the instructors. The Annual Meeting Chair should have negotiated any technology support needs for the speakers.

To save equipment rental fees PNC/MLA Annual Meeting planners often arrange to use local equipment or bring their own. In 2004, we saved $1,000 by supplying 2 LCD units throughout the Conference, including CE. There must be a person assigned every day to see that technology issues are resolved. That person must be comfortable with the technology involved and prepared to work with hotel staff. <u>He/she should have extra cables/bulbs/etc. for all local equipment being used</u>.

Plan to provide security for any local equipment being used.

XII JOINT CHAPTER MEETINGS

Typically, PNC meetings rotate between the three major cities in our Chapter (Portland, Seattle, and Vancouver B.C.). Joint meetings with another Chapter(s) do occur. To date, three joint meetings have been held: in Jackson Hole, WY in 1986, in Seattle in 1990, and in Sacramento, CA in 2003.

Planning for joint meetings begins at the Board level. Once all involved chapters have agreed a joint meeting to, planning begins. Given the varied nature of these types of meetings, this manual will not attempt to cover that planning process. It's a great deal like this only more so!

XIII. PNC/MLA/MLA Annual Meetings Locations

For future meeting planners, here is a list of the last 15 PNC/MLA Annual Conferences. It is always possible to re-visit a Conference theme. Add to this list annually.

<u>2004 Seattle, WA</u>
Theme: 50 Years in the Pacific Northwest: There’s No Place Like Home
Keynote: Samuel M. Miller, LMN Architects

The Seattle Central Library: Pushing the Envelope

2004 Sacramento, CA **PNC/MLA * NCNMLG * MLGSCA Joint Meeting**
Theme: 2004 Gold Rush: The Information Frontier
Keynote: Michael Wilkes, M.D., Associate Dean of Medical Education, University of California, Davis
Changing Medical Education

2002 Vancouver, BC
Theme: Bringing it all Together
Keynote: Eve-Marie Lacroix, Chief of Public Services Division, NLM
Managing Health Information: We're in it Together

2001 Gleneden Beach, OR
Theme: 2001 Hal Un-plugged: A PNC/MLA Odyssey
Keynote: Roy Tennant, eScholarship Web & Services Design Manager, California Digital Library
HAL REPROGRAMMED: Gaining Control Over Information Technology

2000 Girdwood, AK
Theme: Come to the Last Frontier: Explore, Discover, Take Home New Wealth
Keynote: Linda Stone, Vice President for Corporate and Industry Initiatives, Microsoft
From Apple Librarian to Microsoft VP: An Interview with Linda Stone

1999 Seattle, WA
Theme: Access In the Millenium
Keynote: Edward H. Shortliffe, M.D., Ph.D., Professor of Medicine and Computer Science, Associate Dean for Information Resources and Technology, Director, Medical and Information Sciences Training Program, Stanford University
Future of wide-area networking for the health-care community: the NGI

1998 Boise, ID
Theme: Partnering for Better Health
Keynote: Dr. Albert Bandura, David Starr Jordan Professor of Social Science in Psychology, Stanford University
Health Promotion the Sociocognitive Way

1997 Portland, OR
Theme: Surviving and Thriving in the Age of Technology
Keynote: Michael Gorman, Dean of Library Services, Cal-State, Fresno

1996 Whitefish, MT
Theme: Taming the Information Wilderness
Keynote: Bob Berkman, FIND-SVP, Washington, DC
Rethinking the Corporate Health Science Information Center

1995 Bellevue, WA
Theme: On Tract to the Future
Keynote: Clifford Lynch, Ph.D., Director of Library Automation, University of California, Office of the President, Information Systems & Administrative Services Division
Discussed the implications of electronic information, the need for collaboration with Information Systems and their impact on the future of libraries.

1994 Portland, OR
Theme: Bridging the Gap: Forming Community Alliances
Keynote: Mark Scott, President, Mid-Columbia Medical Center, The Dalles, OR

1993 Coeur d'Alene, ID
Theme: The Vision: Looking Outward, Looking Inward

Keynote: Rachel K. Anderson, Director, Arizona Health Sciences Library and Chair, NLM Board of Regents
Health Information Challenges for the Library: Threat or Opportunity (Looking Outward)

1992 Vancouver BC
Theme: Pacific Spirit: Information without Boundaries
Keynote: Mike Ridley, Associate Librarian, Systems, University of Waterloo Library
Global Nets: Librarians in the Virtual Community

1991 Boise, ID
Theme: Soaring to New Heights: Health Information in the 90s
Keynote: Herbert White, Professor and former Dean and Director of the Research Center, School of Library and Information Science, Indiana University, Bloomington
Cost-Effectiveness of Libraries

1990 Seattle, WA **(joint meeting with Mid-Continental Region)**
Theme: Health Sciences Libraries: Coming of Age in the 21st Century
Keynote: Russell C. Coile, Jr., President, Health Forecasting Group, Alameda, CA
Innovation and Change

1989 Salishan, OR
Theme: Future Fitness: Librarians for the Next Century

1988 Bozeman, MT
Theme:

1987 Spokane, WA
Theme: High Tech/High Touch: Information Frontiers in Health Care

1986 Jackson Hole, WY (Idaho's rotation)
Theme: On the Leading Edge

XIV. EVALUATIONS

A. Conference Evaluations

Meeting evaluations are critical. The facility and major components of the meeting are evaluated. Include the evaluation form in the Meeting Packet. Exhibitors should receive their own evaluation form.

B. Evaluation Format

The evaluation should be a one-page document. Because comments are so important in future Conference Planning, the back side is reserved for narrative commentary. Have extras available at the Registration/Hospitality Desk because evaluations are often misplaced or packed, when it's finally time to turn them in. Use SurveyMonkey and send it out to Hlib members after the conference. The 2004 form can be found at: http://www.surveymonkey.com/s.asp?u=8092661692.

C. CE Evaluations

The CE evaluations are handled separately by the PNC Professional Development Committee. They analyze them for PNC and then send the originals (for those with MLA credit) directly to MLA. They also send copies to the instructors.

D. Exhibitor Evaluations

The evaluation should be a one-page document. Because comments are so important in future Conference Planning, the back side is reserved for narrative commentary. Have extras available at the Registration/Hospitality Desk because evaluations are often misplaced or packed, when it's finally time to turn them in.

XV. Final Steps

The Annual Meeting Chair is expected to:

- Tabulate and analyze the evaluations.
- Collect/approve any outstanding bills and forward them to the meeting treasurer for payment.
- Check with subcommittee chairs that all fees owed have been collected and forwarded to meeting treasurer.
- Send thank you notes to speakers.
- Submit Final Report to PNC Chair , PNC Archivist, and PNC Publications Chair.
- Submit both print and electronic versions of the Final Report to PNC Conference Planning Committee Chair.
- Revise Conference Planning Manual and send revision to the Conference Planning Committee Chair.

Annual Meeting Report Template

Please complete all sections of the report. Synopsis and Narrative sections should be 4-5 pages total. Please label each page of the report with the meeting year and location

Please submit 3 copies of the complete report to: 1) PNC Chair; 2) PNC Archivist; 3) PNC Conference Planning Committee Chair. An electronic version of the report needs to be given to the PNC Conference Planning Committee Chair (either send electronically or give disk).

YEAR PNCMLA Meeting Report

LOCATION
DATE

SYNOPSIS/EXECUTIVE SUMMARY

- Planning Committee Roster
- Registration (inclusive & 1 day attendees, total attendance [CE, speakers, vendors])
- CE (number of courses, length of classes, number of registrants)
- Exhibitors (paid and unpaid)
- Sponsors
- Money (Income, expenses, bottom line).

NARRATIVE

What was tried, what didn't work, ideas generated

Include:
Historical overview [optional/ ask archivist]
Planning overview [include comments]
Program
Special events
Exhibits
CE
Budget/financial info
Publicity

BUDGET

EVALUATION

Include tallied responses and recommendations, problems, and suggestions.

APPENDICES:

1. Planning Committee Roster
2. 1 page program
3. Attendees by state/province
4. Complete program packet (include preliminary registration info, final program, evaluation form)
5. Copies of unique letters and forms
6. Budget
7. Evaluation form with tallied responses. Include comments.

XVI. Appendices and Worksheets

Use landscape view when printing Excel spreadsheets.

Budget- Excel Spreadsheet
CE Instructor Contract(s)
Evaluation, Conference
Evaluation, CE
Evaluation, Exhibitor
Exhibitor Invitation
Exhibitor List- Excel Spreadsheet
Fee Adjustment Form
List of Attendees
Newsletters to consider for Publicity
Program
Registration Confirmation
Registration Database- Excel Spreadsheet
Registration Form
Speaker Contract

PNC/MLA/MLA ANNUAL MEETING
CHECK LIST OF REQUIREMENTS

Room Furnishings and Equipment (please note how many required)

Flip Chart ___________________
Blackboard___________________
Erasable board/pens____________
Microphone___________________
Overhead projector_____________
LCD Display unit_______________
Slide projector_________________
Empty slide carousel____________

Screen_______________________
Pointer_______________________
VCR_________________________
Extension cords_______________
Telephone/phone line___________
Other________________________

Room Arrangement

Theatre style _________
    Standing lectern_____
    Desktop lectern_____
    Tables_____________
    If Panel, how many panelists?____

Roundtable Style_____________
    Tables_____________

Assistance

Photocopying________________
    - how many copies?_______
    - color?__________________
    - how distributed?
        during presentation_____
        placed on seats________
        picked up on entrance___

Slide Presentation

manually by presenter___________
automatically__________________

History of this Conference Planning Manual

Original prepared by Steve Teich, Joan Ash, and Carol Willman.

Major revisions in 1990 by Jackie Gagne, Debbie Ketchell, Mary Cambell, Susan Way, Maryanne Blake, and Kathy Murray.

Revised in 1991 by Pam Spickelmier, Nancy Van Dinter, Kathy Nelson, Judy Balcerzack, Deanna Canfield, and Nancy Griffin.

Revised in 2002 by Kathy Murray with assistance from Anne Girling and Loretta Andress.

Revised in 2004 by Robin Braun and Arleen Libertini

PNC/MLA 2000
Annual Meeting Evaluation

Please rate the following on a scale of 1 to 5 (1=poor, 5=excellent). Use NA if you did not attend a session or have no opinion. Thank you.

CONTINUING EDUCATION				
Class	**5**	**4**	**3**	**2**
Saturday				
Digital Copyright			0	
Designing Web Pages			0	
Advanced Web Page Design			0	
Sunday				
Web DOCLINE, SERHOLD, etc.			0	
OCLC/WLN NLM Conspectus			0	
PubMed Update			0	
Wednesday				
Microsoft Access		1		

Suggestions for future continuing education sessions:

Speakers, etc.	**5**	**4**	**3**	**2**	**1**
Monday					
Keynote Speaker - Stone					
Presenting Yourself Effectively - Alling					
Lunch with Exhibitors					
Poster Session					
Time allotted for Exhibits					
Telemedicine - Patricoski					
"Speaking the Same Language" Panel - Leredu, Wykoff, Boer					

Tuesday			
RML Update Breakfast			
Business Side of Medicine - Leredu			
Chapter Business Meeting			
"Using Our Skills" - Starr, Henderson			
OVID Update			
Alaska's Community Health Aide - Burgess			

Events			
	5	4	3
Welcome Reception			
Lunches			
Banquet			
Banquet Speaker – Jackson			
RML Breakfast			
Meeting Site			
Location			
Guest Rooms			
Hotel Services			
Meeting Rooms			
Classrooms			
Overall Conference Guide			