

## Local Arrangements Committee

### A. Committee Charge

1. The Local Arrangements Committee is responsible for planning and executing the local arrangements for the SEAALL annual meeting and affiliated half-day institute and works closely with the President and the Program Committee.

### B. Articles/Bylaws Statements

1. There are no Articles and Bylaws statements concerning the Local Arrangements Committee.

### C. Composition

1. Members of Local Arrangements committee are selected by the Local Arrangements chair or co-chairs and are generally located in close geographic proximity to the site of the meeting for which the committee serves as host.

### D. Responsibilities

1. Annual chapter meeting and educational institute

#### a. Dates

- (1) The Annual Chapter Meeting is held on Thursday evening through Saturday noon near April 1, but should probably occur no earlier than mid-March and no later than mid-April.
- (2) The educational institute occurs on Thursday morning and afternoon.
- (3) The dates can be adjusted earlier or later if “low season” hotel rates are a consideration.
- (4) The meeting should not be held over the Easter or Passover weekend.
- (5) The Local Arrangements chair or co-chairs should consult with the President when choosing the dates for an upcoming meeting.

#### b. Hotel/Conference Facilities

- (1) Factors to consider when choosing a hotel

- (a) General quality and location of hotel
- (b) Room rates
- (c) Meeting facilities
  - i) Capacity for each room depending upon set-up
  - ii) Available space for registration desk
  - iii) Exhibitor facilities
  - iv) Possibility of having coffee breaks near exhibits
- (d) Type of conference services available and what is included
  - i) E.g. lecterns, microphones, a/v and computer equipment, speaker name tents, signage outside meeting rooms, ice water for speaker tables, tables, table skirts, electrical outlets, telephone or computer lines for exhibitors, Internet connection options
- (e) Availability of shuttle between airport and hotel, shuttle availability to other events
- (f) Number of free rooms [**revised 6/2006**]
- (g) Prices and menus for meals or breaks
- (h) Parking availability and rates
- (i) Deadlines - room setups, a/v requirements, menu selection, meal number guarantees
- (j) Availability of site manager during the meeting

- (2) Room details

#### (a) Lodging rooms (**revised 7/2004**)

- i) Reserve more rooms than traditionally needed and release 2-3 weeks before the meeting depending upon the contract with the hotel
- ii) Wednesday night - 40 rooms

- iii) Thursday & Friday nights - 100 rooms
  - iv) Saturday night - 25 rooms [**revised 6/2006**]
  - v) If the host city is an extremely attractive tourist destination, these numbers may be adjusted upward.
- (b) Meeting rooms
- i) Large banquet room for meals
  - ii) Room for exhibits with adjacent space for breaks (may be placed inside the banquet room)
  - iii) Sufficient rooms for 2-3 concurrent meetings - 40-100 capacity [**revised 6/2002, revised 6/2006**]
    - a) Recent educational programs have scheduled 3 concurrent programs [**revised 6/2006**]
    - b) Room for a plenary session - 125 capacity
- (3) Visit the hotel when it is hosting a conference to get a feel for the service and ambience.
- (4) Set lodging room fees at time of selecting hotel.
- (5) If contract is required by hotel, send to President for signature
- (6) Request brochures for distribution during preceding chapter meetings and registration forms and brochures for inclusion in the preliminary mailing.
- (7) The hotel likely will want information about the chapter's finances. Work with the Treasurer to provide this information. [**added 7/2004**]
- c. Budget
- (1) In conjunction with the Program Committee and the President, the committee determines the Registration fee for the meeting and the Institute. [**revised 6/2006**]
- (a) It is SEAALL policy to set the registration fee at a level sufficient to cover all expenses.
  - (b) It is SEAALL policy to include as many meal functions as possible in the registration fee.
  - (c) It is SEAALL policy to keep registration fees as low as possible in order to keep the meeting affordable for all members.
- (2) The committee develops a budget for approval by the Executive Committee. Meeting income should equal or exceed meeting expenses.
- (3) Recent annual chapter meetings have attracted 150-200 paid registrations. [**revised 6/2002, revised 6/2006**]
- (4) Essential meeting expenses include:
- (a) Registration expenses
    - i) Printing of preliminary and final program
    - ii) Mailing of preliminary program
    - iii) Badges and badge holders
    - iv) Ribbons for speakers, elected officers, exhibitors [**added 6/2006**]
    - v) Folders for program materials, handouts, tote bags [**added 6/2006**]
  - (b) Program related expenses
    - i) Audiovisual needs, computers, telephone lines, signage
    - ii) Expenses of Non-SEAALL member speakers (see *Chapter reimbursement policies in Appendix*)
  - (c) Meals/Social Events [**revised 6/2006**]
    - i) Breakfast (Friday & Saturday), Lunch (Friday), Coffee breaks (Friday a.m., p.m.,

- Saturday a.m.), Opening reception (Thursday)
  - ii) Social event (Friday evening)
    - a) may or may not include dinner
  - iii) Transportation costs if an event is not within walking distance, including driver tips
  - iv) Bartender services and temporary liquor license, if needed.
  - v) Music (if desired), security guards (if required), cleaning services
  - vi) Tax and gratuities
  - vii) Flowers for Friday luncheon tables [**added 6/2006**]
- (5) Regular budget reports are made to the Executive Committee during the planning process.
- (6) It is likely that there will be unanticipated expenses which should be factored into the budget. Any egregious unanticipated expenses or cost overruns must be reported to the Executive Committee immediately.
- (7) Treasurer
- (a) All financial activities should be submitted to the committee chair who will forward them to Treasurer.
  - (b) Provide the Treasurer with a cover memo detailing the source of funds for deposit or the services/materials that are the subject of an invoice.
  - (c) If cash transactions (i.e., tips) occur, it may be necessary to prepare a receipt to be signed by the recipient of the cash.
  - (d) Determine which vendors will require payment at the time of the event and notify the Treasurer so that the chapter checkbook can be brought to the event.
  - (e) See Forms to accompany deposit or reimbursement requests [**added 6/2006**]
- d. Vendor Relationships
- (1) Exhibitors
- (a) It is the responsibility of the Local Arrangements Committee to solicit and obtain exhibitors for the annual chapter meeting.
  - (b) Local companies with a sales interest in law libraries, as well as local reps of national companies are good target exhibitors.
  - (c) Initial contact should be made by the Local Arrangements chair or a member of the committee in the summer or fall preceding the annual meeting in order to be sure to get into the marketing budget of the target vendor.
  - (d) Exhibit hours are generally 8 a.m. to 5 p.m. on Friday and 8 a.m. to 11:30 a.m. on Saturday morning, where possible. The room should be available for set up on Thursday afternoon and should have the capability to be secured during the evening hours. [**revised 6/2006**]
  - (e) Exhibitors fees have been set at \$600 recently. An exhibitor package includes one complimentary set of meal/event ticket, an exhibit table and access to an electrical outlet. [**revised 10/05**]
  - (f) Additional equipment is the responsibility of the vendor. Note: Telephone lines are generally requested. It is better for the exhibitor to make those arrangements directly with the hotel as the costs can be direct billed to the vendor.
  - (g) A confirmation letter should be sent to the vendor requesting payment of the exhibit fee; shipping instructions; deadlines for requesting special equipment or telecommunications needs (if the committee is handling - alternatively a contact at the hotel/conference facility can be provided); size of table or booth space available; exhibits schedule including set-up and dismantle times.
  - (h) Exhibitors receive name badges (alternate color paper or vendor tag on badge) and the same registration packet as other registrants.

- (2) Sponsorships
  - (a) The President and/or the Local Arrangements chair or co-chairs will undertake the solicitation of other corporate sponsorships to underwrite the costs of meals, social functions, attendee bags or other giveaways as determined in conjunction with the President and the Program Committee. The Local Arrangements Chair may assist with the appeals if that seems more appropriate in any given year.
  - (b) This effort is independent from the efforts to attract exhibitors. Vendors who sponsor events must also pay the exhibitor fees if they choose to exhibit.
  - (c) Contributors receive complimentary meal/function tickets at the following levels
    - i) For a contribution of \$500 - one set of tickets
    - ii) For \$501 - \$1000 - two sets of tickets
    - iii) For \$1,001 - \$2,000 - three sets of tickets
    - iv) For \$2,001 and more - four sets of tickets
    - v) OR, provide one set of tickets for exhibiting and one set for sponsoring an event [added 7/2004]
    - vi) Typically, only half of the complimentary tickets will be used.
    - vii) Vendor sponsoring Institute - Reps must pay Institute Registration Fee [added 6/2006]
  - (d) Acknowledgment of the contributions
    - i) In writing by letter, in the final program and in the *Southeastern Law Librarian*
    - ii) Orally at the business meeting and
    - iii) With the placement of signs at the sponsored meal or event
  - (e) If fund-raising efforts are successful, consult with the President and Program chair about upgrading events or menus, or in the reduction of the registration fee.
- e. Publicity/Hospitality
  - (1) Preceding the meeting
    - (a) Collect brochures, pamphlets, etc. about the host hotel to be distributed at the chapter meetings that precede the meeting.
    - (b) Maintain a booth in exhibit hall during the preceding annual meeting
    - (c) Conduct drawing or other activity to generate interest in the meeting if desired
    - (d) Ask the Local Arrangements Committee for the upcoming meeting if a table in the Exhibit area is desired. If so, provide the same information given to exhibitors on table size, shipping address, set-up and dismantle dates, etc.
    - (e) Prepare three articles for *Southeastern Law Librarian*
      - i) Summer and Fall issues - see Chapter Calendar for deadline dates.
        - a) Discuss history and culture of host city and region
        - b) Discuss tourist attractions and any special events that may be occurring during the meeting. Include URLs for any useful websites.
    - (f) In conjunction with Program Committee and the PR Committee, prepare notice for the Chapter News column of *AALL Spectrum* and AALL Calendar of Professional Education Events. [amended 7/2004, revised 6/2006]
    - (g) Consider submitting announcements to other chapter newsletters within the southeastern region and to electronic listservs (law-lib, seaall-l, etc.)
    - (h) Communicate weather reports or last minute notices to attendees via email.
  - (2) During the meeting
    - (a) Display brochures on local attractions at the registration desk or at a hospitality desk

during the meeting.

- (b) Have a copy of local bus routes and schedules and a city map available.
- (c) Consider staffing a hospitality desk during coffee breaks.

f. Registration

(1) The Local Arrangements committee is responsible for producing and mailing the preliminary program for both the Institute and the meeting along with the hotel registration form. [**revised 6/2006**]

(2) Preliminary Program - see Forms section of this Handbook and committee files for samples.

(a) Contents include:

- i) Educational program listings with moderators, speakers and program descriptions as provided by the Local Arrangements Committee.
- ii) Educational program planned for the annual institute.
- iii) Informative invitation letter from President, Program Committee Chair and Local Arrangements Chair
- iv) Directions to the meeting site (driving, air and train transportation) including directions from airport/train station to hotel and average cost of cab fare.
- v) Registration schedule
- vi) Meeting schedule including
  - a) Committee and Executive Board meetings
  - b) COSELL meetings
  - c) Law library tours
  - d) Mentor program gathering
  - e) Opening reception and description
  - f) Friday social event and description
  - g) Deadlines for receipt of registrations and hotel reservations

vii) Registration form – see Forms section of this Handbook and committee files for examples

- a) Section 1: Registrant name, affiliation, address, phone, fax, email address
- b) Section 2: Membership status, first time attendee check box, vegetarian and/or kosher meal preference, ADA accommodations request
- c) Section 3: Registration fees with lines for amounts and totals
- d) Section 4: Indicate programs to be attended
- e) Deadlines for mailing form(s) and address(es) for mailing
- f) Form should include chapter Federal id number

viii) Institute registration form

- a) may be included as a section of the main registration

(b) Consider placing all materials on chapter website

(3) Preliminary program packet

- (a) Prepare 10% more than SEAALL membership number [**added 6/2006**]
- (b) Plan to mail the preliminary program via first class mail no later than February 1 or at least two full months prior to the opening reception.
- (c) Packet should include (many of these items will be printed in the preliminary program rather than be a separate sheet)
  - i) Preliminary program
  - ii) Annual meeting registration form

- iii) Institute information
- iv) Hotel brochure and registration form
- (d) Packet may include (some of these items may be printed in the preliminary program or may be included in the *Southeastern Law Librarian* as time and printing budget permit.)
  - i) Mentor program registration form
  - ii) Placement registration form
  - iii) Saturday optional excursions (if planned)
  - iv) Library tour information (if planned)
- (e) Save one complete packet for Archivist [**added 6/2006**]
- (4) The Local Arrangements committee receives registration fees from the attendees and prepares badges
  
- (5) Name badges & ribbons
  - (a) Use standard word processing software to create name badges
  - (b) Include attendee name, library and institutional affiliation
  - (c) Obtain both “necklace” style and clip or pin style badge holders
  - (d) Use different colored paper for members, non-members, exhibitors, first time attendees (ribbons may be used)
  - (e) If the budget allows, obtain ribbons from local trophy shops
    - i) Speaker, Officer, Exhibitor, Student [**revised 6/2006**]
    - ii) Mark First time attendee badges with stickers [**added 6/2006**]
  
- (6) Registration Packets
  - (a) The following items can be placed in a presentation folder and included in a tote-bag or portfolio, if a sponsor has been identified for this item (name badges and tickets should be kept separate)
  - (b) Final program [**revised 6/2006**]
    - i) Welcome from current chapter President and others as appropriate [**revised 7/2004**]
    - ii) Lists of Local Arrangements Committee and Program Committee members
    - iii) Meeting schedule with room locations added
    - iv) Map of meeting room layout
    - v) Exhibitor list
    - vi) Contributor thanks
    - vii) Mentor Program activities information
    - viii) Placement activities information
    - ix) Educational offerings
      - a) Check with Program Committee for any last minute changes to educational program.
      - x) Ad for program cost underwriter (if appropriate)
  - (c) Save complete packet for Archivist [**added 6/2006**]
  - (d) List of registrants
  - (e) Restaurant guide
  - (f) Local map(s), city visitors guide or similar literature
  
- (7) Registration Desk
  - (a) Suggested registration desk hours
    - i) Wednesday afternoon for early arrivals and Institute attendees [**revised 7/2004**]
    - ii) 30 minutes prior to start of annual institute
    - iii) 4-5 hours before Opening Reception
    - iv) 1-2 hours on Friday morning
    - v) Use hospitality desk and personnel for any additional needed registration hours.

- (b) Staff desk with two persons, especially Thursday afternoon
  - i) One individual to hand out registration materials
  - ii) Second to answer questions, run errands, give directions, etc.
- (c) Keep file of completed registration forms or print out of registration information at registration desk to resolve any conflicts [**revised 6/2006**]
- (d) Maintain a supply of blank registration forms for walk-in registrations.
- (e) Bring any extra meal/event tickets that might be available.
- (f) Have a receipt book for registrants who request receipts.
- (g) Put meal tickets or coupons behind name tag in badge holder to prevent loss. [**added 6/2006**]

g. Events

(1) Meals

- (a) Friday breakfast and lunch, Saturday breakfast
- (b) Meals should balance between too rich and too bland.
- (c) Breakfast buffets are recommended
- (d) Consider local specialties for the lunch
- (e) Dessert can be a budget dependent item
- (f) Maintain counts of registrants choosing vegetarian options.
- (g) When giving counts to hotel, add additional vegetarian plates in the event speakers or exhibitors have a vegetarian preference.

(2) Opening Reception

- (a) Balance plain meat and rolls, vegetables and other vegetarian items and fancier foods.
- (b) Lighter menus are acceptable if restaurants are within easy walking distance.
- (c) Alcohol is available through use of a cash bar
  - i) If fund-raising has been successful, consider serving only beer and wine under corporate sponsorship
  - ii) Alternatively, may offer a ticket for one free drink.
- (d) Estimate 10% of total attendance (registrants, speakers, vendor reps) will be no-shows

(3) Friday evening event

- (a) This is an optional event if the budget allows
- (b) Traditionally, it is an opportunity for the host area to choose entertainment or surroundings that are special to the area.
- (c) If planning an event away from the hotel, consider the impact on transportation costs and scheduling.
- (d) If planning a reception with no dinner, consider whether you need to rent tables and chairs.
- (e) Estimate 5-10% of total attendance (registrants, speakers, vendor reps) will be no shows.
- (f) This event has typically been heavily subsidized by a contributor.

(4) Saturday afternoon/evening event

- (a) Optional activities may be scheduled
- (b) Possibilities include arranging for local tour companies to offer city tours, tours of local university campuses, group attendance at any special events that may be occurring
- (c) Depending upon the inclination of the committee, these events may be self-serve by the registrant or the committee may choose to purchase tickets in advance and manage the process of transporting attendees to these events.

- (5) Library Tours
  - (a) If desired, schedule on Thursday after the Institute and prior to the opening reception or Saturday following the educational programs.
  - (b) Include a mix of law libraries - firm, court, county and academic.
  - (c) Watch for scheduling conflicts with academic law libraries and COSELL meetings.
  - (d) Include information on the tours in the preliminary program.
  - (e) Designate a committee member or local law librarian as chaperone and tour guide.  
[revised 7/2004]
  
- (6) Tickets
  - (a) Prepare tickets that include the name of the meal or event, the date, hours and location for each event that requires an accurate head count; alternatively purchase 'Admit One' coupons. [revised 7/2004]
  - (b) Volunteers may collect the ticket at the door of the room, the door of the bus or the hotel may choose to collect while serving the meal.
  - (c) 'Extra' meal tickets may be sold to accompanying spouses or friends, as well as to day and student registrants, if available.
  - (d) Price these tickets at the actual cost of the meal
  - (e) Attach these tickets to the registrant's regular tickets before on-site registration.
  - (f) Last minute purchases can be made within reason - there will likely be no-shows to balance the extra ticket sales.
  - (g) At plated meals, provide for vegetarian an additional ticket to put at place for wait staff.  
[added 6/2006]
  
- h. Transportation
  - (1) Determine if hotel offers van shuttle from airport and provide this information in the preliminary program
  - (2) Determine average taxi fare from hotel and provide this information in the preliminary program
  - (3) Utilize free hotel vans whenever possible for other events
  - (4) When hiring bus transportation, reserve at least 3 months in advance of the meeting. Make adjustment to reservations 2-3 weeks prior to the event when final attendance numbers are known.
  - (5) If transportation is not provided, consider the need to reimburse taxi fare for anyone not able to walk the required distance.
  
- i. Audiovisual Equipment
  - (1) Programs
    - (a) See audiovisual section under Programming below
  - (2) Meals
    - (a) Microphones at head table
  - (3) Internet Room
    - (a) Current chapter policy is that such a room will not be provided
    - (b) A local law school may be asked to assist by providing access to their computer lab.
  
- j. Corollary activities
  - (1) Mentor Program
    - (a) Consult with Membership Committee regarding plans for the program
    - (b) Space may be needed for a gathering prior to the Opening Reception.

- (2) First- time attendees - may or may not be participating in the Mentor Program.
    - (a) Coordinate activities with Membership Committee
    - (b) Prepare name badges on alternate color paper or use a ribbon
    - (c) Include a line on registration form to registrant to indicate they are a first-time member
    - (d) Maintain list of first timers and notify the Membership Committee.
  - (3) SEAALL Executive Board and Committee Meetings
    - (a) Consult the President regarding schedule and length.
  - (4) COSELL Meetings
    - (a) Consult with COSELL Chair regarding schedule, length and numbers.
  - (5) Placement Committee Activities
    - (a) Consult with Placement Committee chair regarding planned activities.
    - (b) Include relevant information in the preliminary and final programs
    - (c) Provide space in the Exhibit Hall or other more secure place if desired
- k. Programming
- (1) Generally
    - (a) Programming for the annual chapter meeting and annual educational institute is the responsibility of the Program Committee.
    - (b) Local Arrangements may be asked to suggest possible local speakers.
    - (c) The meeting schedule (length of program sessions, etc.) should be negotiated between the Program Committee and Local Arrangements.
    - (d) Program Committee provides content for the preliminary and final program.
    - (e) Program Committee collects speaker a/v needs and submits to Local Arrangements Committee for reservation with a/v provider by the established deadline or works with the Local Arrangements Committee to obtain the information. **[revised 7/2004]**
    - (f) Program Committee collects and prepares camera-ready speaker biographies and provides to Local Arrangements by established deadline for inclusion in registration packet.
    - (g) Local Arrangements notifies Program Committee of numbers of registrants who will attend each program session so that Speakers can prepare appropriate numbers of handouts.
  - (2) Speakers **[revised 6/2006]**
    - (a) Consult with Program Committee regarding guest speakers
    - (b) AALL Board Member visitor should be included in this group.
    - (c) Notify hotel of rooms and dates needed for guest speakers and that those rooms are to be billed to the chapter master account (if they are not complimentary).
    - (d) Mail hotel confirmations to the guests.
    - (e) The Program Committee will provide a copy of the chapter reimbursement policy.
      - i) Parking, travel to and from home airport, meals other than those provided during the meeting, transportation
      - ii) Per diem of \$50 per day, with no more than \$25 for any single meal.
    - (f) Upon arrival at the hotel, provide speakers with name badge and registration packet.
  - (3) Audiovisual needs
    - (a) Local Arrangements provides Program Committee with a listing of available a/v equipment.
    - (b) Due to the potential lack of appropriate software, speakers should supply their own computers.

- (c) Before offering live Internet access, the costs of such access (including any cost per call) should be explored and communicated to the Program Committee.
- (d) Program Committee distributes the a/v information to the speakers and compiles the needs it for the Local Arrangements Committee
- (e) Sources of a/v equipment include local law libraries (if distance to the conference facility permits), the hotel's recommended/required a/v vendor, or other local options.
- (f) Arrangements should be made to have a technology "expert" on call during the meeting. This may be a member of the committee, a local volunteer or a representative from the a/v vendor.
- (g) Due to the possibility of amended technology needs, it is advisable to re-confirm with speakers a couple of weeks before the meeting.
- (h) Room assignments may be dictated by the most efficient use of a/v equipment.
- (i) The Program Committee chair and the Local Arrangements chair may decide that it is more appropriate for the Local Arrangements committee to handle audio-visual requests from speakers. [revised 7/2004]

(4) Room Monitors

- (a) Volunteers should be recruited to monitor each meeting room to address such issues as a need for additional chairs, audio visual or equipment problems, climate control in the room.

2. Committee meetings

- a. The first Local Arrangements Committee meeting may be held as much as 2 years before the annual chapter meeting.
- b. The Committee is encouraged to meet during the annual chapter meeting, to conduct committee business via email and to hold conference calls as needed.
- c. Minutes will be recorded for each conference call and meeting.
- d. If significant committee business occurs via email, copies of significant messages should be maintained in print for committee files
- e. The Committee Chair or a designee will attend the meetings of the Executive Committee if requested.
- f. The Committee Chair or a designee will attend chapter business meetings, reporting on committee activities as necessary.

E. Relationship to SEAALL Officers or Other Committees

1. President

- a. Consults in regard to choice of dates for annual meeting.
- b. Consults regarding any contracts
- c. Participates in budget preparation.
- d. Participates in fund raising activities.

2. Treasurer

- a. Handles all funds generated or expended during the annual meeting. No separate bank accounts are created.
- b. The Local Arrangements Committee chair should arrange for most charges to be billed to SEAALL, and **NOT** to the chair's home institution.[revised 7/2004]

3. Membership Committee

- a. Coordinates the Mentor Program activities during the annual chapter meeting.

4. Newsletter/Public Relations Committee

- a. Receives and prints copy about the annual meeting.
  - b. May assist with publicity if requested and time allows.
5. Program Committee
- a. Offers to assist with choice of a theme that may be reflective of the locale.
  - b. Provides a committee liaison to assist with locating local speakers.
  - c. Manages hotel arrangements for guest speakers
  - d. Manages a/v requests of guest speakers (or assigns responsibilities to the Local Arrangements committee) **[revised 7/2004]**
6. Archivist
- a. Receives old Local Arrangements files.
  - b. Provides additional samples of materials (other than those found in the current committee files) if desired.
7. Handbook Editor
- a. The committee will provide proposed additions and revisions to the procedures included in this Handbook.
8. Membership Database Manager
- a. The Committee requests mailing labels to be used in mailing the preliminary program.
9. Web Master
- a. The Committee works with the Web Master to load the preliminary program and other materials such as publicity, local information, restaurant reviews, etc. on the chapter web site. **[revised 7/2004]**
- F. Reimbursement of Committee Expenses
1. Reimbursement procedure
  2. Ordinary Expenses
    - a. Ordinary expenses such as phone calls, postage and photocopy costs incurred in the performance of Committee activities will not be reimbursed by the Chapter. **[revised 4/99]**
  3. Budgeted Expenses
    - a. Reimbursement memos for budgeted items should be submitted to the Treasurer with a cover memo explaining the reimbursement sought and including any receipts or supporting documentation. **[revised 7/2004]**
  4. Expenses Not Previously Budgeted
    - a. Requests for reimbursement should be submitted to the President and/or Executive Committee with a cover memo explaining the reason for the request and any supporting documentation. **[revised 4/99]**
- G. Chapter Records
1. Receive from immediate past chair
    - a. Previous three years of Local Arrangements files
    - b. Budgets, preliminary and final programs, restaurant guides, etc.
  2. Collect during term
    - a. Items enumerated above.

3. Convey to successor/Archives
  - a. Items enumerated above.
  - b. Older files and materials are to be sent to SEAALL archives: John Barden, Law School Library, University of Richmond, Richmond, VA 23173

H. Calendar of Responsibilities

**Two (or more) years before Annual Chapter Meeting**

**March** Incoming Chair receives copy of Chapter Handbook from Handbook Editor (or whenever the site is chosen).

**April** Choose and book hotel space.

**Year preceding the Annual Chapter Meeting**

**Note:** Many of these events may be accomplished much earlier in the planning process. Should the meeting be scheduled in March, the dates must be adjusted backwards in time. These dates are the absolute last moment dates.

**March/  
April** Chair attends Executive Committee meeting during annual chapter meeting, if invited by President. (Attendance can be delegated.)

Chair attends annual chapter meeting and reports on committee activities during business meeting. (Attendance and report can be delegated.)

**April** Chapter fiscal year begins

*Southeastern Law Librarian* copy due April 30. **[added 3/00]**

**April/  
May** Incoming Chair receives files from previous chair within one month of annual chapter meeting but not later than May 15.

**May/  
June** Develop program theme in consultation with President and Local Arrangements Chair.

Prepare preliminary annual meeting and institute budget in conjunction with President and Local Arrangements Committee. - to be completed by September 1.

**July** Chapter membership year begins.

Chair attends Executive Committee meeting during annual AALL meeting.

Chair attends annual chapter business meeting and reports on committee activities. (Attendance and report can be delegated.)

Budget for annual chapter meeting and institute established by July 31.

Contact most recent past Local Arrangements Chair to discuss any planning issues.

*Southeastern Law Librarian* copy due July 30. **[added 3/00]**

**August** Submit meeting announcement to “Continuing Education” and “Chapter News” column of AALL Spectrum in coordination with President and Program Committee Chair.

Finalize budget for annual chapter meeting and institute by July 31.

Prepare article for *Southeastern Law Librarian* about the history, culture and activities of the host city

Block out program and preliminary schedule for activities in conjunction with President and Program committee

Investigate options and costs for opening reception and Friday night social event

Seek for recommendations for caterers, particularly from sites where events may be held.

Consult with President regarding corporate sponsors for meals, breaks, events.

**September** Book the space and transportation (if needed) for Opening Reception and other social events.  
**October**

Consult with 2-3 caterers (if events are scheduled outside the hotel).

Solicit exhibitors, including general information and Exhibitor registration form. Be sure to coordinate with President’s solicitation of sponsorships.

Prepare second article for *Southeastern Law Librarian* on the host city and area tourist sites.

Receive preliminary program copy from Program Committee.

**October** *Southeastern Law Librarian* copy due October 30. **[added 3/00]**

**November/** Contact local law libraries regarding their interest in being included on tours.  
**December**

Decide whether to offer optional events for Saturday afternoon or evening.

Program Committee provides list of speakers who are authorized to have expenses reimbursed. (also to Treasurer)

Confirm caterer(s).

Follow-up with vendors about exhibiting via mail or phone.

Request hotel brochures and registration forms to include in preliminary mailing.  
(Membership + 20%)

Request President and Program Committee Chair to write introduction for preliminary program.

**January** Finalize schedule for institute, SEAALL and COSELL Board and Committee meetings, local law libraries tours, programs, coffee breaks, meals and other events.

Handbook modifications due to editor two months prior to annual chapter meeting

Prepare Annual meeting Registration form.

Prepare preliminary program mailing and fax to Executive Committee for approval.

Acquire mailing labels from Membership Database Coordinator.

Print and copy preliminary program. (Membership + 20%)

Mail preliminary program, hotel and meeting registration forms by first class mail at least two months prior to the annual meeting.

Coordinate contact with guest speakers and AALL official visitor among the Program Committee and the President.

Receive final program information from Program Committee.

*Southeastern Law Librarian* copy due January 30. **[added 3/00]**

**February** Provide list of new members registered for annual chapter meeting to Membership Committee chair.

Expense/revenue reports due to the President one month prior to the annual chapter meeting.

Send acknowledgment to Exhibitors, include hotel shipping address and confirm needs for Exhibit area (tables, a/v, etc)

Forward checks to Treasurer weekly for deposit.

Make hotel reservations for guest speakers.

Acquire registration supplies (name badges, folders, receipt book, etc.)

Order name badge ribbons if desired

Prepare local restaurant guide and hotel/conference center area map

Prepare “tickets” for events (meals, etc. for which the hotel/caterer will want a count)

Confirm speaker a/v needs with program committee and speaker.

If budget allows, order musical entertainment and/or flowers for events.

**March** Receive Speaker Biographies from Program Committee Chair.

When processing registrations, track first time attendees, vegetarian meal requests, extra meal and/or event ticket purchases, institute registrations.

Determine room assignments for programs.

Prepare final program

Print final program, speaker biographies, restaurant guide and maps (registration + 10%)

After registration deadline, submit counts for each program anticipated attendance to Program Committee Chair

Prepare any signs not being taken care of by the conference facility.

Prepare schedule for registration desk and recruit volunteers.

Recruit volunteers to transport guest speakers to and from airport.

Confirm specific times and av needs with conference facility

Contact exhibitors/sponsors regarding attendees names, prepare badges.

Begin preparation of registrant name badges.

**One week before Annual meeting**

Complete registrant name badges.

Prepare a list of registrants and list of exhibitors, have copies made (registration + 10%)

Give caterer(s) final head counts for meals, including vegetarian requests

Prepare written instructions for Registration Desk volunteers.

Stuff registration packets.

**April/** Review invoices from hotel and other service providers; forward to Treasurer.

**May**

Prepare financial statement including income, expenses and profit or loss; send to President

Write annual report for Committee; send to President

Review SEAALL Handbook; suggest revisions

Prepare and deliver files to next Local Arrangements Chair and/or SEAALL Archives within one month following annual chapter meeting, but no later than May 15.

- I. Relevant Chapter Forms [Revised 4/99]
  1. Annual Committee Report
  2. Reimbursement memo
  3. Budget report
  4. Annual chapter meeting registration form
  5. Annual chapter meeting preliminary program
  6. Annual chapter meeting budget
  7. Institute registration form
  8. Form to submit registration fees to Treasurer.