

## Program Development Checklist

### Deciding to hold a program

- What is the program topic or theme?
- What is/are the learning objective(s) of the program? Use action verbs.
- What is the purpose of the program (education, profit, promotion, etc.)?
- What is the format of the program (panel discussion, lecture, workshop, etc.)?
- Prepare a concise description of the program for use in conveying the program concepts to potential speakers and for marketing the program.
- Prepare a program timeline, with due dates, from beginning to end.
- Will the program be a one time event or will it be a series of programs?
- Will the program be done live or as a webinar?
- How long will the program last (an hour, half day, all day, more)?
- Will the program include a social period? Will it include a meal?
- Who will find the speakers?
- Will speakers be members, local experts, or experts who must be brought in?
- Will there be a vendor exhibit area at the program? Will there be time during the program devoted for visiting the exhibit area?
- Who will have overall responsibility for the program? Who will be the backup person?
- Who will be available on site on the day of the program?

### Financial considerations

- How much will it cost to produce the program?
- Is there a budget? Is the budget limited or non-existent?
- Can the group afford to do this program without financial assistance? What is the effect on the treasury?
- Options for funding – registration fee, vendor support, CPE or other grant.
- Will a registration fee be charged?
- Is the registration fee for cost recovery only or to make a profit? What will members accept as a reasonable cost? Are we charging enough to show value to the program?
- Vendor support – how much advertisement and control are we willing to share with them? What is the potential effect on relations with other vendors?
- If there is a vendor exhibit area, will there be a charge to the vendors to set up an exhibit? Will this income be used to defray program costs?

- What grants are available? How long does the grant process take and what are the deadlines? What are the requirements for accepting the grant?
- Will extra insurance be required?

### **Venue considerations**

- Where can the program be held? A member's facility or another location?
- Is the location convenient enough for attendees to get to?
- Places to consider – law school, large firm, public (non-law) library facilities, hotel/conference center.
- Will food services be provided by the venue?
- Can a caterer be accommodated with access and facilities (parking & loading, refuse, running water, heating and refrigerating sources)?
- Is parking available?
- What security issues do we have to deal with when accessing the venue?
- Will overnight accommodations be required for some members? How much will it cost?
- Is equipment provided by the venue or must it be brought in (microphones, computer, projector, etc.)?
- Does the program require a vendor exhibit area? Is this part of the contract? What are the rules for exhibitors?
- Is the contract reasonable? What contract obligations exist? Who can sign it?
- What insurance is required? Is it beyond the basic AALL liability? How long does it take to obtain?
- Is there a room rental fee? Does it require a deposit? Will the program income cover the cost? When are the fees due?

### **Speaker considerations**

- Does the speaker need to be an expert in the area or only someone familiar with the topic?
- Could a member or local expert be found?
- How to find an expert – AALL Speaker Database, professional associations, college/universities, law firms, private businesses, and referrals.
- Does the speaker have a fee? Honorarium? Speaker agreement?
- Is the speaker barred from taking money or a gift (ethics restrictions on public employees)?
- Are there travel fees? Is it paid upfront or reimbursed at a later date?
- Who makes the travel arrangements?

- Are overnight accommodations necessary?
- Do we have to pay for the speaker's meals?
- Are we paying for the speaker's meal at the program?
- If the speaker needs to stay overnight, do we have to entertain them?
- Will the speaker require transportation to and from the program? Who will be assigned to this task?
- Will the speaker provide the handouts or do we need to produce and bring those for them?

### Equipment

- What equipment is needed for the program?
- Who is the pre-program and program onsite contact?
- Does the venue provide the equipment or do we bring it in?
- What is the fee for rental of the equipment?
- Would a member's institution be willing to loan the equipment?
- Who is responsible for running the equipment? What support is available onsite?
- Will we need internet or teleconferencing connections in the room?

### Food

- Will food be served during the program (lunch, dinner, breakfast, or snack)?
- Is food provided by the venue?
- Are there any food restrictions in the venue?
- Do we have to hire a caterer?
- Can we cater the food ourselves (coffee, soda, cookies, pastry, etc.)?
- Could we get a sponsor to provide the food?
- What less expensive options do we have (consider breakfast before morning program as opposed to lunch following)?
- Do members have special food needs (strict vegetarian, common allergies)?
- If attendees bring family members or guests to the program, can they purchase guest meals at food functions?

### Accommodations

- Will members need overnight accommodations?
- Block rooms at one or more hotels.
- What cost would members consider reasonable?
- Is the location of the accommodations close to the venue and other facilities such as restaurants?

### Promotion

- How are we going to promote the program to members (E-newsletter, AALL Calendar, Listservs, Blogs)?
- Create a promotion timeline and list of tasks.
- Is the program open to non-members or affiliated groups?
- Is the registration fee different for members and non-members?
- How are we going to promote the program to non-members?
- What is the promotion budget?
- Who is responsible for the promotion?

### Accounting

- Who is responsible for handling all of the financial transactions? Who is the backup person?
- Are records being properly kept?
- Is the insurance in place?
- Are the contracts completed and signed?
- Are there any tax implications?
- Designate person(s) to handle all financial transactions on the day of the program.
- Have receipts and checks ready for use at the program if required.

### Registration

- How will the registrations and fees be collected (mail in, collected at the door, Paypal account)?
- Who will handle the RSVPs? How will confirmation be handled (mailed, email)?
- How will the registration and payments be tracked (Excel, accounting program, other)?
- Is there a no show policy?
- Is the registration fee for members and non-members different?
- Is there an institutional rate?
- If the venue is a member institution is there a fee reduction for its employees?

### Program day

- Coordinators should be designated and arrive early to the venue.
- Have name tags available.
- Final test of all equipment should be conducted.
- Speakers should be greeted and introduced to officers and other key members.
- Sign-in sheets should be present and kept to provide members with confirmation record of attendance if requested.

- Will handouts be provided at the door in a packet or does the speaker prefer to hand out materials as they go?
- Designate person(s) to handle all financial transactions that day, registration payments, receipts for registration, and vendor payments.
- Keep all receipts from vendors.
- Prepare and distribute evaluation forms for the program. Feedback sought can include comments on current program success and shortcomings along with suggestions for future programming.
- Thank sponsors at the beginning and end of the program.

### **Follow up to program**

- Thank you notes should be sent to all speakers.
- If a member institution is the venue, a thank you should be sent to the head of the institution.
- All program materials should be sent to the archives.
- Make sure all payments to vendors are paid and that all payments due to association or SIS are collected and accounted for.
- Prepare a final report on the success and failures of the program. Feedback from the evaluation forms can provide much of the information needed for this report.
- Create template documents to use for the next program (to make program planning easier the next time).