American Association of Law Libraries
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).