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 the venue provide food services?
- [ ] 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 overseeing all 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 manage 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 manage the RSVPs? How will confirmations be managed (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 manage 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).