Focus On The Forest, Not The Trees: A Checklist For Planning Chapter Meetings

Lisa K. Traditi, MLS, AHIP
http://hdl.handle.net/10968/10968

Jon Crossno, MLS, AHIP
http://hdl.handle.net/2152.5/3096

Planning Joint Chapter Meetings Checklist

Form an official steering committee for the meeting, which should include (at least) the following:
- One individual from each participating chapter (serves as the official liaison to that chapter)
- The meeting treasurer (should be someone local to the meeting)
Leadership of the steering committee (preferably co-chairs) should be identified from this pool.

Use spreadsheet to collect essential information about regular chapter meeting:
- Seed money from chapter
- Length of conference (number of days)
- Opening reception
- Closing reception
- Paper sessions(s)
- Poster sessions(s)
- Vendors (number of days for exhibit hall)
- Charge for vendor booths
- Pre-conference CEs (number?)
- Post-conference CEs (number?)
- CE costs
- Registration costs
- Meeting rooms
- Total attendance (not including vendors)
- Total sleeping room nights
- Hotel rate for sleeping rooms
- Related organizations that need meeting space

Prepare a “Memorandum of Understanding” that clearly defines the following:
- Participating chapters
- Guidelines for the official steering committee, including governance and any related committees
- Seed money from each chapter
- Financial expectations (net profit/loss) for the meeting, including any necessary calculations (e.g., divide profits by the relative percentage of each chapter’s attendance, accept loss by the relative percentage of each chapter’s total membership on a given date)

Identify general target dates for meetings in order to start locating hotel/meeting space

Use length of conference, total attendance, total sleeping room nights, and meeting rooms from spreadsheet to help narrow down what is needed. Be sure to get proposals from “office-in-the-sky” attendance figures.

Set an overall budget for the meeting that would include the expected income and post
- Determine the overall budget for the meeting that would include the expected income and post
- Set hotel/meeting space and finalize hotel contact.

The contract should include complimentary rooms based on the number of sleeping room nights that are filled (e.g., 2 camp room for every 45 room nights). These can be used to fulfill contractual lodging needs for plenary speakers, CE instructors, and/or other invited guests.
- Add pre- and post-days to the primary room block reservation at the negotiated room rate, if possible, to accommodate early arrivals and late departures (and if meeting content needs to be added before/after the primary meeting dates). Try to reserve as much meeting space as possible. It’s generally easier to release rooms if they are not needed for the actual meeting than it is to add rooms (at the last minute) when you discover you need them. Be certain to clarify in advance what is required for state/federal tax documentation as soon as possible.

Solicit committee volunteers as soon as possible from all participating chapters.

Define goals and responsibilities for committees.

Survey Highlights

Would you have found a manual helpful?
What do you wish you’d known from the beginning?

Yes, our manuals were very helpful. I wish we had known a lot of things. Did you know that the word “contributed paper session” doesn’t mean the same thing in all chapters? Did you know that tax exempt status varies from state to state and get especially complicated when you’re outside your geographic region? Did you know that the other chapter gets upset if you don’t plan a full breakfast? There’s so much that is assumed doesn’t necessarily carry over from chapter to chapter.

Would you ever plan a multi chapter meeting again?

Why?

Yes, I would. I think it’s great! I would do it again. I think it’s a good way to get to know other chapters.

Would you recommend a multi chapter meeting to your chapter if you didn’t have to plan it?

Maybe, but I’d want a lot more information. I’d want to see a budget and more information about what we would be responsible for.

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