

## Annual Meeting Checklist

### IMPORTANT DEADLINES LOCAL ARRANGEMENTS:

Local Arrangements		
Select city and meeting dates	By January board meeting; to be approved at meeting	
Select and secure meeting location (and hotel, if hotel is not also meeting venue)	Selection should start no later than 12 months prior to the anticipated meeting date	
Initial meeting announcement and opening of registration		
Hotel reservation deadline		
Meeting registration deadline		
Submit final attendee number to conference site (for room set-up) and caterer		
Program Committee		
Program development	Ideally draft program is available by early summer	

### PROGRAM COMMITTEE:

- Develop session topics and possible speakers; solicit session and poster proposals;
- Develop annual meeting theme and title
- Invite and confirm keynote speaker and presenters
- Invite and confirm moderators for each session
- Send confirmation letters requesting speaker information including AV needs, summary of presentation, and a short bio; obtain signed participation forms from presenters
- Contact invited speakers regarding travel arrangements and reimbursement of expenses
- Post information regarding annual meeting on SGA website as update as program is developed

### LOCAL ARRANGEMENTS COMMITTEE:

#### Hotel arrangements:

- Negotiate written contract containing dates, room rates, and number of rooms blocked off
- Establish hotel reservation deadline
- List of other suggested hotels in/near vicinity on SGA website, if necessary
- Inform Treasurer if hotel requires separate credit application

#### Meeting space and catering arrangements:

- Negotiate written contract containing dates, room rates, room set-up style, catering, etc.
- Select rooms for each session/event (if applicable)
- Select food/beverages for meeting venue and reception

- Establish deadline for submitting final number of attendees to meeting site (for room set-up and caterer)
- Make arrangements with venue for AV equipment and support

Meeting registration:

- Determine registration fee and deadline (see Registration Fees below)
- Create online registration forms for the SGA annual meeting web page
- Cancellation fees and deadlines should be explicitly stated on the registration form (see below)

Publicity/SGA Website:

- Coordinates creation of annual meeting promotional materials for distribution via listserv and social media
- Submits announcements/updates to the SGA Newsletter, SAA listserv, and other regional archival organizations as appropriate
- Coordinates photographs and text for website and other publicity
- Builds website with links to registration, hotel, meeting venue (if different from hotel), and pre-conference workshops (work with web master)

Vendor exhibiting and sponsorship:

- Establish costs of exhibiting and sponsorship for on and off-site vendors
- Build website for vendors with vendor fees and venue information
- Create a vendor registration form to link to the SGA annual meeting web page for vendors
- Solicit vendors to exhibit and sponsor breaks, the reception, and the meeting giveaway. Solicit off-site vendors to include ads in the annual meeting packet.
- Coordinate vendor participation and forward vendor information packets from the meeting site (hotels and other venues have specific instructions for vendors)
- Create vendor information sheet with details about shipping their equipment to the venue, local arrangements contact info, set-up and take down times, etc.; link to vendor website
- Recognize vendors at meeting (in program, on signs, on website, president should mention in welcome)
- See below for vendor rates and information

Meeting registration:

- Open early bird registration in early summer
- Process meeting registrations (Administrative Assistant and Treasurer may assist)
- Purchase folders, labels, and name tags for packets (Administrative Assistant)
- Solicit and coordinate contents of packets including:
  - Final program (Program Committee Chair)
  - Attendee list (Administrative Assistant)
  - Name tags (local arrangements chair; can generate from WA)
  - Vendor list
  - Any other materials such as lists of area restaurants, membership renewal forms, etc.
- Assemble meeting packets

#### Registration fees:

- Registration fees should be set for early bird, late, and on-site (example below)
- Fees should be set keeping overall meeting costs in mind (catering, venue, giveaways, etc.) so that all costs, if possible, will be covered by income. Don't forget to estimate vendor fees, too.
- Early Bird registration should begin in early summer and run until six weeks before the meeting; late registration should run for four weeks and close two weeks before the meeting; all remaining registration should be on-site

Registrant	Early Bird	Late	On Site
Member	85	95	105
Non-Member	100	110	120
Student	70	80	90
Speaker	70	80	90

#### Who must register:

- All attendees of the annual meeting must register, including speakers, invited presenters, scholarship winners, etc.
  - Plenary speakers will be registered by Treasurer, but fees will be waived (coordinated with Local Arrangements Chair)
  - Scholarship winners with waived registration fees will be registered by the Treasurer with information from Scholarship Chair
  - Presenters who submit a session proposal must register; local arrangements chair can set a discounted fee for speakers

#### Cancellations:

- Cancellations are to be refunded as follows:
  - Registrations cancelled more than 60 days before the event will be refunded 100% of the registration fees.
  - Registrations cancelled less than 60 but more than 30 days before the event will be refunded 50% of the registration fees.
  - Registrations cancelled less than 30 days before the event will not be eligible for a refund.
- Information about cancellation fees and deadlines should be stated on the registration form
- If it is requested, and if it is determined that a member is/was unable to attend the annual meeting because of sickness or an emergency situation, it is up to the discretion of the local arrangements committee to refund the attendee or their institution.

#### During annual meeting

- Monitor food/breaks set-up
- Act as liaison between program committee and venue staff for issues with A/V, temperature, etc.

#### On-Site Requirements:

- Tables for all on-site vendors
- Table for mentoring committee
- Tables for registration (2); allow enough room for on-site registration set-up
- Tables for scholarship committee to collect silent auction items (2-3)
- Table to put out SGA membership materials, sign-up sheets for committees, etc.
- Other tables as needed; send e-mail to board with inquiry

#### Other:

- Select, design, and purchase meeting giveaway

#### Annual Meeting Wrap-Up:

- Design online meeting evaluation on Survey Monkey (coordinate with web master) and follow up with links via listserv and social media; set deadline for respondents and send out a reminder a few days before the deadline
  - Share results with incoming 1<sup>st</sup> and 2<sup>nd</sup> year directors
- Follow-up with a reminder a few days before survey deadline
- Thank you note to Program Committee and Local Arrangement Committee members (Local Arrangements and Program Chairs).
- Thank you letters to keynote speaker, presenters/moderators, sponsors, and host institution (if applicable) (SGA President).

Approved by the Executive Board March 2, 2015