

INFORMATION FOR PLANNING AND CONDUCTING ANNUAL MEETINGS OF SPNHC

Produced and updated by the SPNHC Conference Committee. (October 2000)

PREFACE

The following is a working document intended to assist hosting institutions in planning, preparing, and initiating Annual Meetings of SPNHC. The Policies for Conducting SPNHC Annual Meetings apply to all Annual Meetings of SPNHC, whereas, the remainder of this document is intended to serve as only a working source of information that can help all parties involved in achieving a successful Annual Meeting. Each annual meeting of the Society for the Preservation of Natural History Collections has its own character and spirit. In large measure, this is due to the dedicated work of the Chair of the Local Committee and Committee members. In recognition of the individuality of our meetings, this guide is focused upon fundamental mechanics of running an annual meeting such as deadlines, organization, registration, and some basic aspects of the annual meeting. This guide is just that, for the Chair is the person who copes with the reality of the event and must feel free to make decisions in the best interests of the membership and the local situation. This working document is subdivided into six parts:

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POLICIES FOR CONDUCTING SPNHC ANNUAL MEETINGS

- I. Each Annual Meeting must be in agreement with the objectives of SPNHC as discussed in Articles I, II, and III of the Bylaws.
- II. Financial matters associated with conducting the Annual Meetings are the responsibility of the hosting institution and independent of SPNHC finances.
- III. The Annual Meeting will include two Council Meetings, a Annual Business Meeting, opportunities for Standing Committee meetings, an Icebreaker, a Dinner, and an opportunity for members to give presentations. The only expected publication is a Program and Abstracts. Facility tours and pre-conference field trips are frequently organized but optional activities. A pre- or post-conference workshop may be organized in conjunction with the Education and Training Committee.
- IV. Unless other arrangements have been made with the SPNHC Council, neither the host institution nor SPNHC will be obligated to publish the presentations given at the Annual Meetings. Submission of such contributions to COLLECTION FORUM, or similar publication, will be encouraged.
- V. There will be no situation associated with Annual Meetings where the funds provided by the SPNHC membership will be used for profit or to cover the expenses of other SPNHC members or members of the Local Committee.
- VI. Selection of sites for Annual Meetings will be based on invitations received at least two years in advance of the scheduled event. The acceptance of an invitation will be determined two years in advance at the Annual Meeting by a majority vote of attending members. See Institutional Support Section.
- VII. English will be the preferred language used for presentations and printed materials associated with the Annual Meeting. Hosts should check into the necessity of supplying a sign language interpreter in their location. This can be a costly endeavor and requirements and responsibilities should be investigated as early as possible in the planning process.
- VIII. The preservation objectives of the host institution to care for their own exhibits, collections, and related holdings should not be compromised by activities of SPNHC annual meetings.

WORKING GUIDELINES FOR CONDUCTING SPNHC ANNUAL MEETINGS

I. PLANNING.

In determining the feasibility of hosting an Annual Meeting, be aware that the basic requirements are institutional support, availability of suitable facilities, and an appropriate schedule.

A. INSTITUTIONAL SUPPORT.

1. FINANCIAL. The institution itself will inevitably cover some expenditures of the Annual Meeting. Coverage may range from incidental expenditures (for example, telephone and mail communications, photocopying, etc.) to cash contributions.
2. OPERATIONAL. The institution often has various operational functions and staff involved with bookkeeping, security, custodial services, publicity, exhibits, parking, etc. that can be used in planning an Annual Meeting.
3. STAFF. A cooperative effort of the staff can make the event very special for the institution.

B. FACILITIES.

1. ACCOMMODATIONS. Accommodations must be adequate to allow the activities of the Annual Meeting to be accomplished in an effective and expeditious manner. Comfort and conveniences are always well received.
 - a. MEETINGS. The facilities for meetings should include space for at least 200 people, convenient location with respect to other meeting activities, suitable lighting and controls, appropriate audio-visual equipment, and set-up suitable for speakers to effectively address a large audience. Meeting space should include a room large enough to house all attendees for technical sessions and the AGM with other, smaller venues for committee meetings, Council Meetings, etc. Vendor and poster set-up within proximity to coffee break areas is especially desirable but requires space for adequate movement amongst these activities.
 - b. WORKSHOPS. Workshop facilities will depend primarily on the nature of the workshop. Usually, minimal facilities will include adequate space, suitable furniture (particularly writing surfaces), and suitable teaching aids, such as chalk boards, projectors, and screen. Some demonstrations and/or exercises may require special facilities such as electrical outlets, sinks, first-aid equipment, and fire-prevention equipment. Participants at workshops some distance from the host site could expect to share in the cost of transportation as part of the workshop fee.
 - c. SPECIAL EVENTS. Facilities for special events will depend on the nature of the event. A symposium will have the same requirements as those for Meetings (discussed above).

Facilities for social activities will have similar requirements, but with less emphasis on comfortable furniture. Instead, provisions for food, drinks, and free-movement are more important.

2. DINING. The most basic requirement is a means for obtaining lunch efficiently and within close proximity to the meeting site. However, information about dining facilities for three meals each day is essential. Ideally, facilities will vary enough to accommodate anyone's selection of prices, dietary needs, speed of service, and size of crowds.
3. LODGING. Facilities for lodging should be clean, comfortable, convenient, and provide basic necessities for travelers. Efforts should be made to obtain economical rates for attendees. The option to utilize dormitory space is important to many of our members. It is traditional to provide such information for registrants to consider while making their travel arrangements.
4. EQUIPMENT. Equipment that is essential for a conducting a meeting, includes sound systems, projectors, a slide previewing area, screens, special furniture, lighting, etc. Dependable computer, and photocopying equipment are invaluable. Consideration should be given to making a computer, printer and copier available for emergency use. The Secretary and other officers often seek such equipment during the meeting.

C. SCHEDULE.

1. TIMING. An effort must be made to avoid scheduling a meeting at a time that conflicts with organizations that would compete for participants and other resources. The time period for meetings in the past has been late May to late July. During May and June competing meetings include the American Association of Museums, Association of Systematics

Collections, American Institute for Conservation, International Institution for Conservation - Canadian Group, American Society of Ichthyologists and Herpetologists, American Society of Mammalogists, Canadian Museums Association, Geological Association of Canada, and possibly others. Consideration should also be given to holiday conflicts.

2. DURATION. Normally this would be about three to four days of actual meetings, not including the initial day required for Council and Committee meetings and the day (or days) set aside for workshops. Whenever possible, workshops should be scheduled without conflicts such as committee meetings or other SPNHC responsibilities since many members are able to obtain funds to attend the meetings based on workshop participation. Finally, airfare may be the single largest expense associated with attending a meeting. Consideration should be given to scheduling meeting activities to allow those attending to take advantage of reduced "over Saturday" airfares.

II. INVITATION PROCEDURE.

Once the institution has determined that it has the ability to host an Annual Meeting, an invitation must be extended to SPNHC. Basically the invitation procedure involves an initial verbal communication followed by a formal letter of invitation.

A. VERBAL COMMUNICATION FROM CONTACT PERSON. Institutions that are interested in hosting the Annual Meetings should initially contact the SPNHC President and the SPNHC Conference Committee Chair to discuss the possibility and to receive further direction on procedures to follow. Discussions for invitations usually start at least 30 months prior to the meetings associated with the invitation.

B. LETTER OF INVITATION FROM DIRECTOR/PRESIDENT OF INSTITUTION. A formal letter of invitation from the institution must be sent to the SPNHC President. The invitation should be sent at least three months before the Annual Meeting that is two years in advance of the meetings dates being considered. A copy of this letter should also be sent to the Conference Committee Chair. The SPNHC President will be responsible for acknowledging the invitation and providing further instruction.

III. SELECTION PROCEDURE

The success of an Annual Meeting is largely dependent on the participation of the membership. On an occasion where more than one invitation has been received for a given year, the final decision for accepting an invitation will be determined by members attending the Annual Meeting two years prior to the proposed invitation date.

A. FORMAL PRESENTATION TO SPNHC MEMBERSHIP. Institutions providing invitations will be expected to give a five-minute presentation (including slides) at the Annual Business Meeting to inform attending members about the facilities, activities, and costs of registration, lodging, and meals for the proposed meeting.

B. MAJORITY VOTE OF MEMBERSHIP AT ANNUAL MEETING. The members attending the Annual Business Meeting will vote on future meeting sites based on what they know about prospective sites and where they would most likely attend.

IV. PREPARATION ACTIVITIES

After an institution has been selected as the location for a future Annual Meeting, there are a variety of activities that need to be considered in preparing for the meeting.

A. COMMUNICATION. It is essential that the Chair of the Local Committee maintain communication with the SPNHC President-Elect (Conference Committee Chair).

B. EARLY PLANNING. It is extremely useful to have an early idea about the basic activities and dates intended for the proposed Annual Meeting. These activities would include special topics, speakers, symposia, workshops, and tours. This information can be used for promoting the meetings, which in turn can encourage attendance, participation, and financial support.

C. ACTIVITIES AT THE INTERIM SPNHC ANNUAL MEETING. Every effort should be made to encourage attendees from the hosting organization to attend the interim Annual Meeting. This would enable representatives of the hosting institution at the interim meetings to answer questions and to get ideas for their own meetings. Having information/pamphlets available for distribution and having an attractive poster display are also encouraged. If it is to be done at all, it is highly desirable to have the meeting logo and theme developed and available at this interim meeting.

D. EARLY ANNOUNCEMENTS. To allow for long-term budget planning, it is useful for many individuals and institutions to be aware of the basic details of the SPNHC Annual Meeting as early as possible. If at all possible, send fliers, post messages on

the list server and the SPNHC website providing basic information, such as dates, special speakers, symposia, special workshops, and any other information that would encourage individuals to attend the meetings six months in advance of the meeting. Approximate cost for housing, meals, etc. are important in budget planning for attendees. These fliers are also useful in identifying potential non-members that would be interested in attending the meetings. Early announcements should be at least sent to members of SPNHC Council and Chairs of SPNHC Committees. Past host institutions often share additional lists of addresses or email contacts for mailing of advance notices.

E. CREATE LOCAL COMMITTEE. The creation of an effective Local Committee is one of the most important parts of hosting the Annual Meetings. It is important to include as many staff members, associates, and volunteers as possible. Selection of people for various responsibilities should take into consideration the special abilities, interests, commitment, dependability, and time of each individual. Suitable individuals should be selected to chair subcommittees that will handle various aspects of the meetings. Based on previous experience the following categories represent important responsibilities of the Local Committee.

1. CHAIRPERSON. The Chairperson should be able to commit the time and effort needed to work with individuals and subcommittees to develop, organize, and initiate the activities of the meeting.

2. PROGRAM DEVELOPMENT. An essential part of the Annual Meeting is getting individuals to give oral and poster presentations. The host will also determine what, if any symposia, will be held and obtain speakers for these as well. It is helpful to include a few SPNHC members outside of the institution to be on the Local Committee to assist with the solicitation of presentations.

3. PROGRAM AND ABSTRACTS PRODUCTION. The Program and Abstracts will be the primary publication resulting from the Annual Meetings. Copies of the Program and Abstracts will be distributed to registered attendees. The registration form should include the option for members not attending the meeting to order the Programs and Abstracts for a nominal cost including postage and handling. Indicate that copies must be pre-ordered before registration deadline.

4. REGISTRATION AND RESERVATIONS. The proper handling of registration and reservations before and during the meetings is very important to attendees and hosting institution. Registrants should be notified of receipt of fees and be given appropriate registration materials. The Local Committee needs to have good documentation of all income and expenses. As privacy laws permit, the Local Committee may also wish to prepare a list of names, and contact information of registrants for distribution. Local committees will be in the best position to judge how this may be handled based on the laws of their area. A copy of all information that is provided to meeting registrants should be set aside for the Archives. The Archivist advises that this should include everything from the Program to any restaurant guides or tourist information that is provided as well as the canvas bag, specially printed pencils or other items that may be included.

5. SOCIAL ACTIVITIES. The primary social activities of the Annual Meeting are the Ice Breaker and a Dinner. These activities require appropriate locations and possibly assistance with catering, cleaning up, security, etc.

6. LOCAL TRANSPORTATION. The need for local transportation will depend on the location of scheduled events. Local transportation may be needed for tours and other special activities. Although not required, the Local Committee may wish to consider assisting with shuttle service between the meeting site and local airports, particularly if normal transportation is a problem. In some instances, it may even be desirable to consider a shuttle between the meeting site and the lodging site, if other transportation is infrequent or hours of service do not coincide with meeting activities.

7. LOCAL SERVICES. The local services include provision of beverages and possibly snacks, for scheduled breaks during the meeting. This activity requires good organization to quickly accommodate great numbers of people during a short specified time period.

8. INTERNAL RESOURCES. Placement and use of internal resources, such as rooms, projectors, copiers, miscellaneous storage spaces, furniture, workshop equipment, and other items should be arranged.

9. EXTERNAL RESOURCES. Attendees will need to know about the local dining and lodging facilities available outside of the institution. It is also good to know about other activities and places to visit in the area. Other helpful information might include local public transportation options, especially to/from the meeting site, parking, childcare opportunities.

10. GRAPHICS. Attractive artwork and labeling are needed for effectively conveying information to attendees.

11. WORKSHOP AND TOURS COORDINATION. Participation in some workshops and tours may be restricted. Therefore, it is necessary to develop and schedule enough activities to accommodate all registrants at any particular time throughout the day.

12. DISPLAY COORDINATION. Displays associated with the Annual Meetings primarily include poster presentations,

but can also include demonstrations, corporate displays, and tables for handouts. All displays should be organized in an attractive manner facilitating good traffic flow for viewers. In order to attract vendors to our meetings, it is important to situate the poster sessions, vendors' area and break room in close proximity. It is a good idea to seek a Local Committee member who can be dedicated to "vendor relations." This person should begin to solicit corporate assistance by late autumn prior to the meeting.

a. SPNHC RESOURCES DISPLAY. It is expected that the Resources Display Unit (RDU) of the SPNHC Conservation Committee will be displayed at the annual meeting. This should be requested in good time from the appropriate (US or Canadian) representative. Financial support is available from the SPNHC Treasurer for shipping the display to the annual meeting venue. Shipping should be coordinated with the RDU representative. The cost of reproducing the handout that accompanies the display is the responsibility of the borrower. Fees charged for corporate displays may be used in part to offset the costs of the poster and RDU displays.

13. COUNCIL ASSISTANCE. Council and Committee meetings will require comfortable and undisturbed meeting rooms before the technical sessions. Arrangements will need to be made for a quick lunch, so that afternoon Council activities can proceed on schedule. The Council may need copies of reports and other documents so convenient photocopy service should be available. Feedback regarding scheduling of meetings is not always forthcoming from committee chairs. The following schedule offered as a suggestion to avoid conflict among committees with overlapping memberships: Conservation 8-10 AM, Documentation 8-10 AM, Awards and Recognition 10-11 AM, Bylaws 10-11 AM, Conference 10-11 AM, Election 10-11 AM, Finance 10-11 AM, Education and Training 11-12 PM, Membership 11-12 PM, Publications 11-12 PM, and Sessional Committees 11-12 PM. This is only a starting point. It is a good idea to circulate a schedule among committee chairs, to assure that you are allowing enough time to conduct the business that is anticipated and to help avoid known conflicts. Timing of other events and availability of rooms for committee meetings may dictate other arrangements, as well.

F. OBTAIN FINANCIAL SUPPORT. Obtaining financial support for the Annual Meeting may be a problem. Minimally, funds are acquired from the hosting institution and from registration fees. Because people attending SPNHC Annual Meetings are often on very restricted budgets, efforts are made to keep registrant expenses as low as possible. This often means that outside support must be pursued. The one thing to remember is that the overall cost in time, effort, and money per individual decreases as the number of registered individuals increases -- so there is an incentive to do everything possible to encourage maximum attendance at the meeting.

1. INSTITUTIONAL. It has been convenient and useful in the past for cash contributions from the institution to be used to cover registration expenses of the Local Committee and other special participants. This alleviates the problem of covering expenses and registering all participants, as well as the problem of charging individuals that would be helping with the program. Institutional support could be sought to support staff who volunteer a minimum number of hours to assist with the meeting arrangements. This benefit can also be used to encourage individuals to help with the meeting. It is conceivable that the institution may cover other incidental expenses related to the meetings, such as communications, rental of space and equipment, and use of support staff.

2. CORPORATE. The best source of corporate support is from local companies. This support may come in the form of cash donation or contribution of services or supplies. Corporate income may also be acquired through advertising in the Program and Abstracts or display space at the meeting. Vendors' fees may be used to underwrite the cost of renting display boards for the poster sessions and advertisers' fees can be used to help underwrite the cost of printing the Program and Abstracts. Various aspects of our meetings, such as the banquet, coffee breaks, and workshops have all received corporate sponsorship in the past. It is very important to provide equal opportunities and benefits to corporations, and to fully acknowledge their assistance without suggesting SPNHC endorsement.

3. FUNDING AGENCIES AND FOUNDATIONS. It may be possible to acquire funds through federal, state, or local sources for all or special parts of the meetings. Such funding is usually dependent on written proposals being submitted to the appropriate agency or foundation in a timely manner (usually 6-12 months in advance).

4. REGISTRATION. A major part of the expenses of the Annual Meetings is handled through registration fees. It must be remembered that if registration fees and expenses for travel, food, and lodging become excessive, many individuals may not be able to attend the meetings. Rates should approximate the costs of benefits the individual receives during the meeting. Registration fees should not be used for profit or to cover the expenses of other SPNHC members or members of the Local Committee.

a. When setting the registration fee, a few tips from previous hosts are helpful. There are fixed costs that remain the same regardless of how many people attend the meetings. These include space and equipment rental, security, projectionist, set up charges for printing, printing and mailing the Call for Papers, set up costs for the Icebreaker, etc.

Ballpark estimates should be gathered and divided by a conservative break-even registration number to get a base line charge. Then add a per person charge for items such as production of the registration package (name tags, program, carrying bag), food and beverages at breaks, and other expenses that are dependent on the number of registrants. Don't forget to factor in taxes where applicable. If extra funding is uncertain by the time fees must be set, assume there will be none and plan for the minimum. If funding comes in after the registration fees have been set, then you may begin to augment planning to include food at coffee breaks, etc. Canadian venues should use a high Canadian dollar in order not to lose money on the exchange rate with U.S. registrants. That won't make a difference to individual registrants but can be problematic if the exchange rate changes significantly between the time of setting fees and paying the bills. Host committees should consider accepting credit cards whenever possible. Be clear regarding to whom registration is paid and where payment should be sent.

5. **ADDITIONAL CHARGES.** It may be possible to acquire additional funds for special expenses as long as the amounts of these expenses are reasonable, optional, and made known to attendees in advance.

a. **DINNER.** Attendance at the Dinner should not be included as part of the registration fee but presented separately as an additional cost. Additional income can be acquired from the sale of tickets to non-registered attendees (for example, family members).

b. **SPECIAL WORKSHOPS/TOURS/SYMPOSIA.** It is not uncommon for special activities to require additional expenses. In such cases, it would be appropriate to ask participants to share the cost. Additional income can also be acquired from fees paid for workshops and tours by non-registered attendees, if all registrants have been accommodated.

c. **REGISTRATION/RESERVATIONS.** Registration is a direct and necessary method of raising funds. Options to join SPNHC to obtain a lower member's rate, should be made available during registration. Additionally, it is useful to provide cheaper registration rates if individuals are willing to pay by a deadline. Such "pre-registration" rates can provide working-cash and facilitate planning for the meeting. Anyone wishing to pay regular registration fees simply contributes more to financing the meeting. Vendor's fees should include the cost of registration that provides admission for a set number of representatives of the company. This fee should be high enough to cover all incurred costs of the display (including equipment and space rental as well as coffee breaks) and making some money to support other meeting costs. The vendors need to receive all relevant meeting information so they are aware of their audience.

d. **CHARGES FOR NON-MEMBERS.** A non-member surcharge should be high enough to encourage joining SPNHC. The registration form could include a reference to SPNHC membership information on the website and encouragement to join.

e. **LODGING.** Lodging expenses are expected to be paid by the individuals using the facilities. Although no income would be expected from this source, normally there should not be any lodging expenses passed on to the hosting institution.

f. **LOCAL TRANSPORTATION.** If local transportation were provided for convenience, organization, and/or economy, it would be expected that individuals using the transportation would share in the expenses. If the meeting site is difficult to access from the accommodations, the cost of shuttle bus service could be figured into the registration. The Social events could include transportation if not easily accessed by foot or public transportation.

G. PLANNING ACTIVITIES.

1. **LOCAL COMMITTEE MEETINGS.** Meetings of the Local Committee are essential in maintaining communication and avoiding problems. Minimally there should be an initial meeting of the institution administration and the Chair of the Local Committee to discuss schedules, funding, allocation of resources, and legal aspects. The best advice is for the Local Chair to delegate as much as possible making sure you have someone to take control of each assignment. This will allow the Chair to stay aware of all activities and step in where needed without having to abandon key tasks. Keep the committee informed so that everyone knows what is going on, use meetings for brainstorming and give yourselves realistic internal deadlines. A final general meeting (within two weeks of the Annual Meetings) should address last minute concerns and activities.

2. **COMMITMENTS FROM SPECIAL SPEAKERS.** The selection of special speakers is an important part of program development. It is not uncommon for good speakers to have other commitments for speaking engagements as much as a year in advance. Furthermore, such speakers often expect at least to have basic expenses (travel, food, and lodging) covered by the hosting institution. Whatever arrangements are made, it is simply a professional courtesy to make requests for

speaking engagements six to nine months in advance, and perhaps as much as 15 months for special keynote speakers. When arrangements for speakers have been made, it is a good idea to document the details of the agreement with written correspondence, preferably from both parties. When a major speaker has been secured, it might be useful to advise the Conference Committee and/or the Executive Committee.

3. COMMITMENTS FROM LOCAL PARTICIPANTS. To avoid problems with the professional and personal activities of Local Committee members, efforts should be made to get commitments from every individual. Every local participant should be familiar with what is expected of them.

4. RESERVE FACILITIES/EQUIPMENT. As soon as the Local Committee is aware of the physical needs for all activities of the Annual Meeting, appropriate people should be contacted to reserve the required facilities and equipment for specific dates. Because other unrelated functions of the institution may be competing for the same resources, it may be necessary to make reservations several months in advance. This is particularly true if external facilities, such as those for housing and the Dinner, are required. Be aware that Council members and Committee Chairs will probably arrive the day before the Council meetings. All reservations should be documented with written correspondence. It is also a good idea to verify all reservations after two to four weeks.

5. COORDINATE ACTIVITIES WITH APPROPRIATE SPNHC COMMITTEES. The Local Committee should try to coordinate its activities with at least the Treasurer, Conference Committee, Education and Training Committee, and Membership Committee. With ample notification, the Treasurer will provide updated mailing labels for registration packets. An updated listing will also be needed for determining membership status of registrants for member vs. non-member charges. Because the Local Committee is considered to be part of the Conference Committee, the latter can be approached for assistance (if needed), to help ensure a successful Annual Meeting. The Annual Meeting provides a good opportunity to develop membership. The Local Committee should, therefore, contact the Membership Committee for a sufficient number of membership applications to mail with the registration packet. Workshops are usually organized in conjunction with the Education and Training Committee.

6. FINANCES AND FUND RAISING.

a. SET UP ACCOUNTS. Because the financing of the Annual Meeting will involve several thousand dollars, special accounts should be set up to handle incoming funds and expenditures. It may be desirable for tax purposes, to separate incoming funds in special categories for registration, lodging, donations, grants, etc. It is advisable to seek advice/support from your institutional financial support staff. If the host institution has a Conference Planning Office, seek assistance from their staff.

b. PROPOSALS. At least a year in advance, the hosting institution should be aware of potential agencies and foundations to approach for financial support. Proposals should be submitted in a timely manner to accommodate the schedule of the funding source as well as to provide time for resubmission, if necessary.

7. ADVERTISEMENT. About seven to nine months in advance, the hosting institution should send out news releases about the Annual Meeting. This will normally allow sufficient time for organizations to publish the information in appropriate publications prior to the meetings. For instance, the news release for SPNHC should be sent to the editor of the SPNHC Newsletter no later than July (for the August issue) and January (for the February issue) preceding the meetings. Collection Forum should not be considered an outlet for advertising Annual Meetings. A news announcement should be placed on the SPNHC web page and NHCOLL-L. Additionally, past host institutions often share additional lists of addresses or email contacts for institutions that should receive news releases from the Local Committee.

8. REGISTRATION PACKETS.

a. PROGRAM OUTLINE AND SCHEDULE. It is important for the attendees to know as much as possible about the program so that they can plan their travel arrangements and other activities during the time of the meetings.

b. FACILITIES INFORMATION. Information about the institution, dining facilities, lodging facilities, and other features of the local area is extremely useful in helping attendees to make personal decisions about what they will do and what they will bring. References should be made to handicap accessibility in the information provided for the meeting.

c. CALL-FOR-PAPERS. The Call-for-Papers should include a format for writing presentation information (authors, addresses, title, and abstract) in final form. Electronic submissions by email or diskette should be strongly encouraged. For poster presentations, precise instructions regarding poster format, dimensions, attachment, etc. must be included with the registration packet. An extra copy of this packet should be sent to the SPNHC Archivist. Note that production and mailing of the Call for Papers is a major expense and should be factored into registration fees.

d. **REGISTRATION FORMS.** The Registration Forms should be simple and clear, yet provide sufficient information to assist the Local Committee in planning the meeting.

9. **PROCESS REGISTERED INDIVIDUALS.** As registration materials are received, the hosting institution should process registered individuals in a timely manner. Processing will include maintaining appropriate records and sending acknowledgments and other relevant information to registered individuals. Effort should be made to accept major credit cards because it makes paying much easier. This could well result in better attendance, especially for non-domestic attendees.

10. **ESTABLISH MEETING SCHEDULE AND DEADLINES.** It is important to establish realistic schedule and deadlines for the meetings to maintain control and to monitor progress of activities. These working parameters are needed for the Local Committee as well as the attendees. Dated e-mail or FAX and postmarked correspondence are the best way to determine if attendees have made a deadline.

a. **ABSTRACTS FOR PRESENTATIONS.** It is advisable to aim to get abstracts for all oral and poster presentations no later than two months before the meetings. The Local Committee may wish to take advantage of the information technology available at the host institution to handle Abstract submission. A possible problem in preparing the Program and Abstracts is that important speakers may be late in submitting their abstracts. It is the Local Committee's right to refuse to accept a paper or poster on the basis of quality of content. (Likewise, the committee can refuse a vendor or advertiser).

b. **PRE-REGISTRATION.** It is the decision of the hosting institution to determine the deadline for pre-registration benefits. Normally, this deadline will be early enough to allow the hosting institution to plan the meetings according to the numbers of expected attendees. However, the deadline should be about six to eight weeks after the registration packets are distributed. This will allow for delays caused by postal systems and time required for processing checks at other institutions. It might be wise to use the deadline required for reserved accommodations as the pre-registration cut-off, in order to avoid too many deadlines.

11. **PREPARE AND PRINT PROGRAM AND ABSTRACTS.** Plan to allow at least two months before the meetings to prepare and print the Program and Abstracts. One month may be needed for getting last-minute abstracts and late advertiser submissions, then setting up the pages for the printer. Once all of the abstracts are received and plans and schedules have been confirmed, the Program and Abstracts can be prepared in a few days. Before submitting final copy to the printer be sure to proof-read the copy several times to avoid embarrassing errors. Electronic submissions from authors will help to avoid some problems, so taking advantage of current technology cannot be over-emphasized. Misspelled names, altered institution names, and heading errors are particularly easy to overlook. Strive for consistency. The second month is needed to accommodate the printer's schedule and still leave enough time to include the publication with the materials given at registration. Be sure to maintain good communication with the printer to insure the published version is ready on schedule and in the desired form.

12. **NOTIFY PRESENTERS OF SCHEDULE.** Individuals giving oral or poster presentations should be informed of their schedule in the program, preferably before the meeting.

13. **PREPARE REGISTRATION MATERIALS.** As soon as the registration documents and supplementary materials are available, they may be sorted and placed in envelopes or folders for distribution at registration. Each registrant should receive a copy of the Program and Abstracts, a name badge that is correct and legible at a distance, receipts for fees paid, tickets for special events, housing information (if handled through the host institution), and special messages. Supplementary information for registrants might include maps, information about public transportation, a list of local dining facilities, tourist information, and a list of useful telephone numbers (medical and emergency dental assistance, police, taxi, etc.).

14. **MAKE A DETAILED SCHEDULE OF MEETING ACTIVITIES.** To avoid a break down in the communications among members of the Local Committee it is a good idea to prepare and distribute a detailed schedule of all meeting activities for each hour of each day. Information about each activity, such as objectives, individuals concerned, and materials needed, should be included. This information should be distributed to at least the Chairs of the Subcommittees as well as other involved institution personnel, such as security, custodial services, and public relations.

15. **PREPARE DIRECTORY OF REGISTRANTS.** The preparation of the Directory of Registrants can be an ongoing process if a word-processor is used. This will no longer be legal in some locations --- check the privacy laws to assure that this is allowable. Be sure the name, address, phone number, and e-mail addresses of each registrant are correct. The final entries will usually be made during the second day of the meetings. After the Directory is completed, good photocopies

should be made for distribution to the registrants, if allowable by local law. If general distribution is prohibited locally, the listing should be provided to SPNHC for use by the Membership Committee, the Publications Committee, and for archival purposes.

16. Hosts should check into the necessity of supplying a sign language interpreter in their location. For example, hosting institutions in the U.S. will likely be obligated to meet the requirements of the Americans with Disabilities Act. This can be a costly endeavor and requirements and responsibilities should be investigated as early as possible in the planning process since the cost of such arrangements must be factored into registration or negotiated with the host institution.

V. CONDUCTING THE ANNUAL MEETINGS.

A. REGISTRATION AND RESERVATIONS.

Registration usually begins during the afternoon of the day before the beginning of the actual meetings. There should be facilities and a sufficient number of Local Committee members to quickly process attendees as they arrive. It may be suitable to have a separate registration table for the pre-registered attendees. Although it is impractical to exclude non-registered individuals from the general activities of the meetings, they should not receive registration materials or have the benefit of attending workshops, tours, or other special functions without sharing with the costs of such activities.

B. COUNCIL/COMMITTEE MEETINGS.

1. INITIAL MEETING. The first Council meeting is at least a day before the beginning of the formal presentations. It is helpful if the Council meeting can take place in a location that is reasonably comfortable and undisturbed. Scheduling should be arranged to allow adequate time for Committees to hold their own meetings first. The first Council meeting may follow during the same day in a room large enough to include Committee Chairs as well. Arrangements will need to be made for a quick meal, so that Council activities can proceed on schedule. Often, the President communicates arrangements for the meal to those who will attend the first Council Meeting. The location may be set based on advice from the Local Committee. This has been viewed as a mechanism to catch up socially before the business of Council gets underway in earnest.

2. SUBSEQUENT MEETING. Sometime after the Annual Business Meeting of the Society, facilities and a two-hour block of time are needed for the final Council Meeting.

C. ANNUAL BUSINESS MEETING.

The Annual Business Meeting of the Society should be scheduled for a two-hour period at a time that will not conflict with any other activities.

D. PRESENTATIONS.

Sessions for oral presentations will require a Session Chair to introduce speakers, keep the session on schedule, and to serve as a time-keeper for individual speakers. The Chair will need a timer and a method for communicating time to speakers. A 20-30 minute break should be scheduled after every 90 minutes of presentations. Lunch breaks should be at least 90 minutes. If at all possible the room for presentations should allow individuals to easily enter and exit without disturbing the presentations. Because of the problems of monitoring and controlling attendees it is not worth the effort, frustration, or embarrassment to restrict attendance at regular presentations.

1. OPENING SESSION. The opening session starts with the welcoming address and invitation, followed with the acceptance of the invitation by the SPNHC President. Regardless of when a keynote presentation is scheduled, it should not be any longer than 30 minutes. Any other invited speakers should be restricted to 20 minutes each.

2. ORAL. Oral presentations should be given in a situation where the speaker can easily address the entire audience. Regular presentations are usually restricted to 15-minute time periods --12 minutes for the presentation and three minutes for questions. Sessions should be kept on schedule by an assigned moderator. Slide projectors, overhead projectors, pointer, screen, podium, suitable sound system, and variable light control are the basic needs for oral presentations. The use of chalk boards and posters in the oral sessions, is not permitted.

3. POSTER/DISPLAYS. Posters and displays should be given in a situation where attendees can comfortably view and move around even in a crowd. A block of time must be scheduled when the presenters will be expected to be with their posters so that attendees can have the opportunity to discuss the presentations. In order to attract vendors to our meetings, it is important to situate the poster sessions, vendors' area and break room in close proximity.

E. SPECIAL SESSIONS. If special sessions limit the number of attendees, such activities should give priority to registered individuals. If any activities involve local transportation, be sure that there is insurance coverage in case of accidents.

1. WORKSHOPS/TOURS. For overall scheduling purposes and providing breaks it is convenient to plan workshops and tours in standard 90-120 minute blocks of time. Although this will usually allow two in the morning and two in the afternoon, it also offers some flexibility for half blocks or double blocks that may be required for some activities. There should be enough activities to accommodate all registrants at all times during the day. Experience has shown that good workshops and tours tend to use all time available. Individuals in charge of workshops or tours should be very conscious of the schedule requirements. Be sure to allow enough time between activities for attendees to get to the next activity. Individuals in charge of tours should be familiar with the names of individuals expected on the tour in case it is necessary to wait a few minutes for late arrivers. Workshops are usually organized in cooperation with the Education and Training Committee.

2. SYMPOSIA. A symposium is considered a special activity because it usually involves an organized series of presentations on a particular subject. It should not be in conflict with any other activity of the meeting. Symposia are normally treated in a similar manner as oral presentations (see Section D). Symposia can be scheduled as an evening or all-day activity.

F. SOCIAL ACTIVITIES.

If social activities are to be outdoors, there should be contingency plans in case the weather turns bad.

1. ICE BREAKER. The Ice Breaker takes place during the evening before the first day of presentations. The occasion should be simple but suitable for casual interaction among attendees. Beverages and snacks are normally available.

2. DINNER. The Dinner may involve a casual dinner and an evening activity. In the past, when other activities have been included, they have ranged from entertainment to touring museum exhibits or zoological gardens.

3. OTHER. Each meeting site has its own unique setting and other arrangements may be organized at the discretion of the Local Committee. At a minimum, it would be helpful if facilities could be suggested for attendees to gather at the end of the day to socialize.

VI. POST-MEETING ACTIVITIES

A. ACKNOWLEDGMENTS.

Sending out letters of appreciation to individuals that assisted with the Annual Meeting, including thank you notes to vendors, sponsors and special speakers, is among the most important post-meeting activities. Although contributors of funds or materials are the most obvious to be acknowledged, do not forget the individuals on the Local Committee or other people who provided services in one way or another. If acknowledgments were to be sent to individuals that helped develop the program with presentations, it would be appropriate to encourage those individuals to prepare their contributions for submission to Collection Forum. It may be appropriate to coordinate this activity with the SPNHC Managing Editor.

B. DISTRIBUTION OF PROGRAM AND ABSTRACTS TO NON-ATTENDING SPNHC MEMBERS.

Call-for-Papers should include the option to purchase a copy of the Program and Abstracts, for a reasonable sum based on cost estimates for this publication. The intention to purchase the program must be made by a pre-set deadline or the Local Committee is under no obligations to provide copies. Abstracts may soon be posted on the website, eventually precluding the need to include this option.

C. CONCLUSION OF FINANCIAL ARRANGEMENTS.

1. INSTITUTION. Conclusion of all financial obligations of the institution may require several months. The final obligation of the institution may be to pay taxes on certain funds received as a result of the meeting.

2. SPNHC. The only financial considerations involving SPNHC would be payment of any money loaned to the institution for "start-up" expenses or making an optional contribution to any of the established funds of the Society, if excess income is derived from the meetings. Financial assistance to help cover any anticipated expenses resulting from activities of the Annual Meeting (for example, special publications such as *Managing the Modern Herbarium*) is particularly encouraged. However, under no circumstance can SPNHC be involved with income that would jeopardize its tax-free status.

D. SUBMIT FINAL REPORT TO SPNHC COUNCIL.

A final report of the annual meeting should be sent to the SPNHC President who will in turn distribute copies of the report to other Council members. This report will be maintained as a permanent document of the Society and be used in planning future meetings. The report should include a summary of activities accomplished, a breakdown of numbers of registered participants (for example, members, non-members, internal, external, etc.), a listing of registration charges, and recommendations for future

meetings or changes in guidelines. Although there is no obligation of the hosting institution to explain financial details, any information regarding general costs would be helpful to other institutions that may be interested in hosting future meetings. It would also be extremely helpful to

update and pass along to the next Local Committee information such as vendor lists, news release contacts, and institutional mailing addresses that were used during the planning process.