



CHURCH AND SYNAGOGUE LIBRARY ASSOCIATION

CONFERENCE PLANNING MANUAL

This Conference Planning Manual serves as a guide for conference planning committees. Each conference is unique and each conference planning committee is organized differently to adjust to the local situation. As long as all the responsibilities are covered and the deadlines are met, the conference is the product of the conference planning committee. THIS IS A GUIDE ONLY.

I. CONFERENCE - GENERAL

- A. **PURPOSE** - the main purpose of the CSLA Annual Conference is to provide educational opportunities for church and synagogue librarians. These opportunities include classes in all phases of congregational librarianship for both beginning and experienced librarians, as well as inspirational and informative speakers for the whole assembly, and opportunities for networking and fellowship.
- B. **POLICIES**
1. Established by CSLA Executive Board
 - a. All who participate should be made aware that CSLA is an interfaith association.
 - b. Persons serving as CSLA Committee Chairs must be CSLA members, chapter members, or CSLA Affiliate members.
 - c. Conference General Chair[s] arranges for Executive Board winter meeting at the Conference site during the month of January preceding the Conference. Any Executive Board costs will be paid from CSLA general funds, not from Conference income.
 - d. CSLA Administrator may make an on-site visit to help negotiate the Conference contract. Costs of the visit will be included in the Conference budget. Only the CSLA Administrator agrees to the terms of, and signs, the host facility contract.
 - e. Registration fees are to be established by the Conference Committee on the basis of estimates intended to cover all expenses of the Conference, other than room and board of attendees and exhibits [which are self-sustaining.]
 - f. Single day as well as full time registration fees are to be established by the Conference Committee. The total of the single day registrations should be greater than the full time rate. There may be a fee differential between CSLA members and non-members.
 - g. Exhibitors are asked to exhibit on Sunday and Monday only.
 - h. Exhibitors will not be charged registration fees; they do pay exhibitors' fees. Exhibitors who are CSLA Institutional Members get a 50 per cent (50%) discount on exhibitors' fees
 - i. The registration fee may be waived for incoming and outgoing Executive Board members (officers and committee chairpersons.)
 - j. Conference General Chair[s] of the current conference and the following year's general chairs are eligible to have registrations fees waived. Other Conference

- Committee Chair[s] are eligible for one half (50%) of the fee waived.
- k. Honoraria and expenses for speakers, leaders, and entertainment should not exceed a total of \$3,000.00, without prior approval of the CSLA Executive Board.
 - l. Workshop leaders will be offered one complimentary lunch at the discretion of the Conference Committee.
 - m. Awardees shall be offered the Awards Banquet meal. Awards Chair sends a letter to awardees outlining this arrangement. *[In the past, we have offered Awardees the cost of their share of a room for one night. They pay for room and meals and send for reimbursement. However this is not economically feasible now.]*
 - n. At the end of Conference, there is a final meeting with host facility to settle accounts. This meeting should be attended by General Chair[s], Local Arrangements Chair, Treasurer, and Administrator.
 - o. Annual Conference meeting expenses of CSLA Administrator and Publications Editor are paid by the Association from general funds, not from Conference income.
 - p. Conference cancellation policy: there will be no refunds after dates set by Conference Committee. They do have the prerogative to make refunds on a case-by-case basis.
 - q. If the Conference committee feels that it is worthwhile to purchase Awardees books for sale, it can do so only with the approval of the Executive Board. It is in general expected that the books will be furnished by the awardee's publisher. Books may also be for sale by exhibitors/vendors.
2. The following recommendations are to be ready for the Executive Board's winter meeting in January preceding the Conference:
 - a. Conference program plans and theme
 - b. Plans for any pre-and post-conference courses, tours, activities, etc.
 - c. Detailed conference income and expense budget.
 - d. Established dates and policies on early registration fees, late registration fees, and cut off dates for each.
 - e. Established dates and policies on refunds.
 - g. Established complimentary meals policy.
 - h. Established honoraria and expense limits for speakers, leaders, and entertainment including any transportation/mileage.
 - i. Established exhibit fees and number of expected exhibit tables.

II. ROLE OF CONFERENCE PLANNING COMMITTEE

A. STRUCTURE

| | |
|--------------------------|-------------------------|
| General Chair[s] | Program Chair |
| Exhibits Chair | Publicity Chair |
| Finance Chair/Treasurer | Registrar |
| Hospitality Chair | Secretary for Committee |
| Local Arrangements Chair | Transportation Chair |

President and Administrator of CSLA are both *ex officio* and will serve in an advisory capacity (when and where ever needed by the committee.)

B. RESPONSIBILITIES - GENERAL

1. The Committee is responsible for locating several suitable Conference host facilities. If necessary the Administrator will do site inspections. The Administrator along with the Conference Chair(s) make the final decision on a site.
2. Conference Committee is responsible for planning, coordinating and executing the entire Conference.

3. The committee chooses a theme for the conference.
4. The committee attends the winter Executive Board meeting in January held at the Conference site and submits a report of work completed and remaining [see above.]
5. It is vital that all committees keep in touch with the general chair[s] and with each of the other committees during the entire planning process. This is especially true of overlapping tasks such as Local Arrangements and Hospitality, Local Arrangements and Program, Program and those doing the program booklet to name a few. COMMUNICATION IS THE KEY - MAKE REGULAR REPORTS TO EACH OTHER.
6. Create conference and workshop evaluation forms.

C. RESPONSIBILITIES - SPECIFIC

1. **CONFERENCE GENERAL CHAIR[S]**
 - a. Appoint all sub-committee chairs and sees that each one has all the helpers deemed necessary. Responsible for seeing that all Conference sub-committee chairs carry out their responsibilities, as stated in this manual, and that they stay on schedule.
 - b. Responsible, on behalf of CSLA, for all financial obligations, except facility contract, relating to the Conference. No other persons may make financial commitments without the approval of the Conference General Chair[s].
 - c. Responsible for seeing that a contract covering all meeting, housing, and meal arrangements with the host facility is signed by CSLA Administrator in advance of the Conference. Finances permitting, arranges for CSLA Administrator to visit facility for purposes of negotiating the contract.
 - 1) Responsible for seeing that all speakers, entertainment, and tour contracts are acceptable and signed by Administrator.
 - 2) At the time required by the host facility, working with the approval of the Administrator, and with the Local Arrangements Committee, is responsible for making the commitment concerning the final room count and the final meal count to the host facility. Estimates are based on the expected number of conference registrants.
 - d. Draw up a planning calendar for the year leading up to the conference.
 - 1) Call meetings of Conference Planning Committee Chairs when deemed necessary - once a month in the year leading up to the conference is usual.
 - 2) Remain on top of deadlines and responsibilities of all Committees to insure timely accomplishment.
 - e. Visit the Conference facility with the entire local planning committee to ascertain the following:
 - 1) space available for meetings, exhibits, registration/hospitality tables, meals, lodging, including those needed for pre- and post-Conference activities and Board meetings
 - 2) determine complimentary space, and space that will incur extra charges
 - 3) determine if shipping and mailing services are adequate/available for exhibitors, Conference leaders and participants
 - 4) confirm there is ability to meet special dietary needs, such as for Jewish participants, diabetics, etc.
 - 5) identify facilities that are nearby for pre- and post-Conference meals and housing, if not available at site
 - 6) determine how many persons can be seated on stage/podium for Opening Session and the Annual Business Meeting [if this is necessary. Inform National President who will plan head table seating if required]
 - f. With Conference Committee make conference evaluation form to be placed in registration packet.

- g. Schedule with Program Committee a joint meeting with the next year's conference committee during the conference if requested. This should be encouraged. There are always questions
 - h. With the national Past President plan the Advisory Council meeting at conference
 - i. Provide Bidding Cards to Exhibits Committee for the Silent Auction, or have the committee make their own.
2. **EXHIBITS COMMITTEE**
- a. When the chair/committee visits the conference facility with Conference Committee, obtains area measurements in order to make suitable table layouts.
 - b. Reviews mailing list of exhibitors from Administrator to determine if there are additional names to be added. Sends updated list to the Administrator.
 - c. In consultation with Administrator, General Chair[s], and/or Local Arrangements Chair/committee, sets fees for exhibitors.
 - d. In the fall before the conference in consultation with the Administrator, prepares text of letter and reservation form to be sent from Office to all potential exhibitors in December. Reservation form samples are on file in the national office.
 - e. Exhibit reservations and checks are sent to CSLA. Returned forms are forwarded to Exhibits Chair. Exhibits informs Registrar of number of exhibitors as they do not pay registration fee.
 - f. With information from Local Arrangements, provide exhibitors detailed information about housing (local motels), meals (local restaurants) and arrangements for delivery of exhibit materials to conference facility.
 - g. A storage facility must be arranged for early deliveries from exhibitors, from workshop leaders, from speakers [CHECK WITH PROGRAM CHAIR,] and from silent auction donations. On day of setup all stored materials are brought to the exhibits area.
 - h. Exhibitors should be told they will be introduced at the opening session of the conference.
 - i. Exhibits are during specific hours on Sunday and Monday only. Exhibits will be closed during the opening session, meals and their related programs, and during the business meeting. Exhibitors pay for their own meals, housing, and exhibitors' fees. Remember they do not pay the conference registration fee.
 - j. Prepares follow-up letter for non-responding exhibitors to be sent in February from the national office.
 - k. Plans arrangement of exhibit room with host facility coordinator and sees that appropriate number of tables is available, including tables for CSLA publications sales [staffed by Administrator and Publications Committee], as well as the Silent Auction. Provides for table coverings [usually provided by facility.]
 - l. Sees that signs are provided by/for exhibitors.
 - m. Provides the program booklet creator a list of exhibitors with representative information, if possible, and description provided by company to be included.
 - n. Is present, and has committee members present, at time(s) designated for setting up of exhibits. Has representation from committee all times that exhibits are open.
 - o. Supervise sale (or distribution) of books from group exhibit (those companies that do not send a representative, only their wares).
 - p. Is responsible for writing a thank-you letter to exhibitors. This may be mailed from the Office with a list of participants.
 - q. At least six weeks in advance, provide exhibitors with workshop bibliographies [if you can get them] and a conference schedule listing programs, workshops and author autographing sessions. CONSULT WITH PROGRAM CHAIR.
 - r. If possible, provide each exhibitor with a CSLA conference tote.

- s. May be asked to arrange for silent auction and for author signings.

SILENT AUCTION INFO:

The Silent Auction of the conference is a perennial favorite with conference delegates. It consists of books and other media being auctioned off in the exhibit area in order to bring added revenue to the conference budget. Also the sale helps to draw delegates into the exhibit hall. There should be an auction sub-chair with at least two committee members to assist.

1) Sources for books for the Silent Auction

- Ask the Conference Planning Committee and Local Area Chapter/Affiliate Organization to save their gently used or nearly new books, CDs, DVDs, etc throughout the year to contribute to the auction.
- The CSLA Administrator generally has books sent to the National Office from publishers, which are shipped to conference for the auction.
- The association's Book Review Editor may have titles which have not been reviewed and could be shipped to the conference. HOWEVER, publishers are not sending books in the numbers they have in the past.
- The Silent Auction Committee can solicit books from publishers who may give some sample copies. AGAIN, THIS WILL BE LESS THAN IN THE PAST.

2) Table set-up and display of Auction Books and other Media

- A large sign designating the auction area will distinguish it from other exhibits.
- The Silent Auction committee will be responsible to obtain Bidding Cards either from the General Chair or make out their own; fill out with the name of media and a minimum bid; insert in media.
- The Silent Auction sub-committee checks in the exhibit area several times during the day to keep books/media in browsing order. These monitors can answer questions as needed.
- The bidding process closes with the shutting down of the exhibit hall on the last day. (This is usually 6:00 p.m. on the next to last day of the conference.
- After the closing of the exhibit hall, the committee, and anyone else that can be mustered, sort the materials according to the highest bidder.
- The books and media are stacked up separately according to bidder's last name. Bidding slips are attached stating the total owed by bidder.
- Following the evening program, books/media may be collected and paid for the exhibit hall. The auction committee accepts cash and checks. If credit cards are used, the Administrator has that capability.
- The auction committee counts the money, preferably by two different people and turns over to the Administrator for safe keeping.
- Unclaimed books will be taken to the conference hospitality desk to be picked up and paid for the next morning.
- For those bidders who end up with too many books and materials to carry away from the conference it would be well for the committee to have boxes for them to pack and directions on how/where to ship.
- the committee should have to have a plan for disposing of books not sold at auction.

3. **FINANCE COMMITTEE**

- a. Work with the entire conference committee to prepare a budget based on program plans. The budget should be based on fewer persons than are expected to attend. Not everyone is a full-time registrant. Budget codes and sample Conference budgets are available from the National Treasurer and Administrator.

- b. Obtain estimates of income/expenses from all committee chairpersons. In consultation with Administrator and General Conference Chair[s], set registration and meal fees for full time attendees based on formula Administrator/Treasurer provides. Fees are intended to cover all conference costs except those of exhibits.
- c. Exhibit fees are not considered part of Conference budget but are expected to produce income over and above the rest of the Conference income.
- d. Set meal costs to be slightly increased to the costs obtained by Local Arrangements Chair from the conference facility personnel.
- e. Have budget prepared to present at January board meeting.
- f. Establish a policy on the “cut-off” day for refunds and inform Administrator what this policy is. There should be NO REFUNDS for lodging and meals AFTER the official guaranteed count has been reported to the site facility. **THIS COUNT IS A COMMITMENT TO THE FACILITY.**
- g. Consult the Administrator for a “formula” for figuring last minute meal count. This “formula” is used ONLY when registrants exceed the number of originally-contracted minimums. [If you do not understand this, please, consult the Administrator.]
- h. See that all Conference Committee expenditures stay within the approved budget. All invoices to be paid or expense reimbursements should be submitted through the Finance Chair/Treasurer (using forms supplied by the National Treasurer.)
- i. During Conference, works at Hospitality/Registration tables accepting and keeping records of all monies received for sales items, walk-in registrations, additional meal and tour registrations, etc.
- j. After Conference, records by budget codes all monies received, converts all cash into a bank check or money order made payable to CSLA, sends the check and all other checks endorsed “for deposit only”, plus all supporting paperwork to Administrator in the CSLA Office
- k. After Conference, in consultation with Conference General Chair, photocopy appropriate workshop handouts, and mails packets of these handouts to conferees who ordered and paid for them. [If this is offered at the conference.]

4. **HOSPITALITY COMMITTEE** work closely with Local Arrangements and Registration
- a. The committee function is to aid conferees in having a comfortable and enjoyable experience at conference. This chair needs to work closely with the Registrar before and during the conference.
 - b. Enlists local people to work at Hospitality table during the Conference. Sets up schedule of persons to be on duty at all times. This includes the afternoon and evening before the Conference begins when many people arrive and at the end of Conference when the last tour returns to the facility. It is important to have information about the availability of Saturday night and Sunday morning meals at the conference site or nearby restaurants
 - Orders tote bags and plans meal favors
 - The committee with Registration Committee prepares packets/totes of information to be given to conferees upon arrival. For inclusion in the packet:

| | |
|--|---------------------|
| pencil (sharpened) | note pad |
| city map | facility floor plan |
| brochures on local places of interest | evaluation form |
| workshop handouts order form | name tag |
| Conference program booklet | |
| meal and tour tickets | |
| sample publicity release for use when return home. | |
 - All these to be placed in the conference packet/tote for attendees.

- o An emergency contact form to filled out at the registration desk when packets/totes are handed out. This form remains at the welcome desk.
 - c. Hospitality committee members should be familiar with the conference site and surrounding area in order to be able to pass information to the conferees. Investigate surrounding community resource, congregations, bookstores, drug stores, restaurants, hotels/motels, hospital, post office, off-site lodging, opportunities, etc.
 - d. With Local Arrangements Committee identify the mailing and UPS services for attendees wishing to mail books and purchases back home, and possibly exhibitors.
 - e. Arranges for strategically-located message board, so that Conference personnel and participants can communicate with each other.
 - f. Conference General Chair[s]/Administrator solicit hosts/hostesses. At conference committee members distribute host/hostess instruction and evaluation forms (and gifts for workshop leaders, if desired) to each workshop leader and host/hostess. If gifts are being presented to workshop leaders, host/hostesses should pick up gifts from hospitality table.
 - h. Committee arranges for table decorations for sit-down meals. Chair works with committee members to schedule the putting of decorations and souvenir favors on tables just prior to meals. Work with hotel management to coordinate time and placement of table decorations and favors. Utilizes facility accessories wherever possible.
 - j. Monitors sales of any items for benefit of local sponsoring chapter/affiliate.
 - k. Works with registrar and hotel for method of identifying attendees with dietary needs. Prepares, to include in their conference tote bag, an item or placard to place at their table setting at each meal to aid wait staff.
 - l. With Local Arrangements investigates surrounding community resources churches/synagogues, bookstores, drugstores, restaurants, hotel/motels, hospital, post office, off-site lodging opportunities, etc.
5. **LOCAL ARRANGEMENTS COMMITTEE** works very closely with the Hospitality Committee
- a. With Hospitality Chairperson investigate surrounding community resources churches/synagogues, bookstores, drugstores, restaurants, hotels/motels, hospital, post office, off-site lodging opportunities, etc.
 - b. Prior to the winter Board meeting and the Conference, clarify with hotel registration details including the way the organization is identified by the hotel (CSLA or Church and Synagogue Library Association) for registration purposes.
 - c. Arrange meals, lodging and meeting facilities for the [National] Executive Board winter board meeting to be held at or near the Conference facility during January preceding the conference.
 - d. Serve as liaison with person assigned by host facility to the Conference.
 - e. Arrange for rooms and food needed for all pre- and post conference activities and meetings, including all Board and Personnel Committee meetings, and Chapter Presidents' Dessert/Advisory Council Reception (Dessert / Activity), Prez Corp if necessary.
 - f. Arranges all rooms needed during the Conference for registration, hospitality, exhibits, behind-the-scenes workroom, workshops, interfaith service, opening session, Awards Banquet [with Awards Chair,] Chapter President/Advisory Council Reception [with Chapter Coordinator and 1st VP] First Timers' Program [with 1st VP], annual business meeting, closing luncheon, any other special activities, meals, and/or all on-site lodging.
 - g. Choose menus, and make arrangements and gives catering instructions for food at all meals, coffee breaks, and receptions. Make arrangements for special dietary needs. (Remember to avoid foods not generally acceptable to our Jewish and/or

- Muslim members).
- h. Arrange for meals and lodging needed for guest speakers and Awardees. Assigns someone to meet speakers and other guests and serve as their host/hostess while at Conference - working with Program committee, Awards Chair, etc.
 - i. In coordination with Exhibits Chair, arrange for shipping, mailing and storage facilities at Conference site for use by exhibitors, workshop leaders and participants. Locates nearest UPS pick-up station. The host facility; it may serve as a pick-up station.
 - j. Working with Program Committee assign workshop rooms based on pre-registration size of workshops, [and] facility space and audio-visual needs as requested by workshop leaders.
 - k. Again working with Program Committee see that all plenary sessions, interfaith service, workshops, and meetings are provided with facilities requested by leaders and speakers. The conference facilities may or may not include podiums, microphones, projectors, overhead and LCD projectors, laptop computers, flip charts with markers, white boards with markers and erasers, screens, tables and chairs. Be prepared [if at all possible] for need of workshop leaders to have a half hour early entry for set-up time in their assigned room with all requested equipment. Some conference facilities are equipped to deal with quick room changeovers, but not all, and equipment may be too costly an expenditure.
 - l. Arranges for the production of directional signs to be placed on site, directing participants to parking and luggage drop-off, registration, etc., if not provided by the Arranges for production of signs identifying workshops by title and leader. Arranges for these signs to be posted at the doors of the assigned workshop rooms. If requested, these signs may be provided by the host facility. Also provide table-top signs for authors in author signing sessions. PLEASE, MAKE SURE **ALL SIGNS ARE LEGIBLE FROM A DISTANCE**.
 - n. Determines cancellation policies in conjunction with Conference Committee decision.
 - o. Work with Hospitality Committee about table decorations and/or flowers for sit-down meals.
 - p. Coordinates with Chapters Coordinator for Chapter Presidents reception and Past President for Advisory meeting. These two have been combined at some conferences.
 - q. At Conference is readily available for trouble shooting at all times.
6. **PROGRAM COMMITTEE** The committee takes suggestions from anyone and everyone for speakers and workshop leaders. The program is actually planned by the whole Conference Committee. The Program Committee carries out the details.
- a. Is responsible for obtaining the major speakers, entertainment, and workshop leaders for the Conference.
 - b. Immediately after its formation of the committee begins to think about workshop leaders. Consider the needs of beginning, intermediate, advanced congregational librarians, as well as enrichment studies. It is helpful to have several persons in mind for each workshop. Consider repeating a few of the workshops. Plan to have 4-5 selections for each time slot.
 - c. In August and September of the year before the conference with the approval of the Conference Committee, invite prospective workshop leaders to present a workshop at the conference. Give a tentative day for the workshop. Ask them to reply by mid-October.
 - d. As soon as possible, but no later than August or September of the year before the conference, in consultation with the whole Conference Committee, decide on

potential speakers and entertainment and invites them. It is possible that some speakers and entertainers may need to be contacted more than a year in advance of the Conference. Speakers and entertainers may be scheduled for luncheons or dinners but keep in mind that too many speakers results in diminishing returns:

- Opening Session - Keynote speaker to set the tone.
- Awards Dinner - It is more important for award winners to have a chance to speak rather than an extra speaker. Awardees should be informed by the Awards Chair as to length of acceptances. It is important that the evening programming not be too long. Awards Chair needs to be consulted to confirm number of awardees attending the Conference and financial arrangements involved. However, these are not available until March or later. If there are only a few awardees, then a speaker or entertainment may be called for.
- Closing Luncheon - Someone to send the attendees away feeling uplifted, inspired and enthusiastic about library ministry.
- Depending on the program schedule, there may be other luncheon opportunities and/or evening opportunities, but do not make the schedule too busy and so filled up that we tire people. We must leave time for the exhibitors and for valuable networking.
- When acceptances have been received from workshop leaders, speakers and entertainers, give that information to the Publicity Chair for Conference news releases, and to the creator of the program booklet if it is not this committee. Discuss room and equipment needs with Local Arrangements.
- Obtain bibliographies from workshop leaders (if applicable) and forwards them to the Exhibits Chairperson who will give this information to booksellers so they can have materials for sale. Request that bibliographies be received at least two months before the conference. And good luck.
- In April, send a confirmation letter to workshop leaders advising them of the day and time of their workshop. Sometimes leaders have a preferential day. Try to accommodate that. Ask what audio-visual equipment they may need and make arrangements to obtain as cheaply as possible. Give them any other necessary information, such as draft of conference program.
- Workshop leaders should be informed that they must provide any handouts they wish to give to participants
- You may offer a complimentary lunch to each workshop leader on the day of his/her workshop. If the leader registers for the conference and meals, he/she will be reimbursed for one lunch. Give the necessary information to the Registrar for the final meal count.
- May [if it seems necessary] plan one evening of special entertainment.
- Plan a program for Saturday evening because many attendees will have already arrived.
- Provide ample time for people to visit the exhibit area during the conference
- CONFERS [Discusses] with General Chair and [National] President about having representatives of the different faiths represented in the Association to give invocations at meals. [The National President may prefer to choose]
- Other events which to be scheduled are: Interfaith Worship Service by Program; President's Reception for Awardees following the Awards Banquet arranged by Local Arrangements; the Annual Business Meeting arranged by the National President; the Prez Corp by Past President; Advisory Council with Chapters' Coordinator and Past President;; introduction of committee chairs by new president
- If authors are invited for book autographing, Program and Exhibits chairs handle this activity together. See exhibits chairperson's responsibilities. Authors should be invited to bring their own books for sale. If they decline this opportunity, conference vendors should be asked to supply these authors' books for sale.
- Obtain biographical information and photos, if possible, from workshop leaders, speakers and entertainers for the Publicity Chair to use as deemed advantageous in news releases and the Conference program booklet, as soon as acceptances have been received.

- Gather and organize all information for the conference program booklet. This committee knows whole schedule and may be the logical choice to do booklet.
- Coordinates sale, copying, and distribution of workshop handout orders to by workshop Host/Hostesses copies of handouts are placed in workshop handout collection box at hospitality table. Weeds handouts and turns in appropriate documents to Administrator who sends out orders.

7. **PUBLICITY COMMITTEE** works closely with all committees to have varied information to put in publicity flyers and articles.
- a. Is responsible for flyers, news release, and feature articles with photos for *Congregational Libraries Today* CSLA's quarterly publication. Is responsible for the text and design of the registration form. May be given the task of creating the Conference program booklet. [Actually this should be given to the person most qualified in this type of work.]
 - b. In spring of year 18 months prior to conference, prepare a conference advertisement to appear on the back page of the current year's conference program booklet and design an invitational flyer to be distributed at that conference as advance publicity. As a courtesy this is sent to the Administrator and the Publications Chair
 - c. Obtain Web site address of Convention Bureau in Conference locale and sends to Administrator as soon as possible. Avail the committee of material from the bureau for use in publicity.
 - d. In August send a flyer to Administrator for publicity to Chapters for their newsletters. Again this flyer should be sent to the Publication Chair as a courtesy.
 - e. In September send news release including date, place and theme of the Conference to the Administrator and Publication Chair for release to *Library Journal*, *Wilson Library Bulletin*, *American Libraries*, *Publishers' Weekly*, etc.
 - f. By September 20 send a general information type publicity piece/ad of 250. words or less for the October/November/December issue of *Congregational Libraries Today* to the Administrator, Publications Chair, and Publications Editor.
 - g. By December 20 send a an article of about 750 -1500 words for the January-March issue of *Congregational Libraries Today* to the Admin, Publications Chair, and Publications Editor. Include photos that do not have to be returned of the Conference locale and/or Conference Committee. These can often be downloaded from locale's Web site.
 - h. Present the registration form at the CSLA Board meeting in January. Immediately following the board meeting the Conference Committee should do final proofing of the form. Within one week following the board it is sent to Publications Chair and Administrator so it can be sent to the Webmaster for uploading.
 - For the information to be included in the registration form SEE PREVIOUS REGISTRATION FORMS ON FILE IN NATIONAL OFFICE.
 - i. By March 20 send a reminder article of 250 words or less for the April-June issue of *Congregational Libraries Today* with any additional photos to the Publications Editor
 - j. In April plan additional recommended publicity for the local area of the conference to: Houses of worship, public library systems in the local area, as well as recent non renewing CSLA members in the conference state and contiguous states. (Administrator has the membership list.
 - k. Six to eight weeks before the conference the final text of any materials of the Conference this committee wants in the program booklet ready for whomever is producing the program booklet.
 - m. Select (provide) a photographer. See that the representative photographs are taken of incoming officers and committee chairs, speakers, entertainers, workshop leaders, awardees, conference and events. Confer with Conference Chairperson and

- Administrator to be sure of necessary photographs. These photographs should be labeled and contributed to the CSLA archives. Send to Publication Editor for inclusion in Jul -Sept *CLT* **immediately following** the conference as it goes to press in August.
- n. Write a sample news release for all attendees to take home and submit to their local newspapers. This news release goes in the Hospitality/attendees packet.

8. **REGISTRATION**

- a. Works closely with Hospitality, Finance, and Local Arrangements before and during the Conference. Stay in contact with Administrator on a regular basis.
- b. Compose a letter with the help of the Administrator, signed by General Chair[s] and/or Registrar welcoming participant, providing information about the Conference, and listing contact, address and phone numbers.
 - One or two pages of general information should be included with this letter describing airport shuttle service, travel directions, amenities in the area emergency phone numbers. Administrator can supply samples. This letter and general information sheets should be to Administrator by March 1 to be sent to registrants.
- c. Receive Conference registrations from Office (General Chair also receives a copy from Office) and charts information frequently, preferably by computer so counts for each category (meals, tours, specific workshops, etc.) are up to date.
- d. Before conference prepare readable nametags. Nametags should include name, city, state, congregation name, workshops, meals, and tours. Appropriately colored/imprinted ribbons should be ordered and placed on nametags identifying officers, Conference Committee members, CSLA staff, speakers, workshop leaders, authors, exhibitors, etc. A count of current ribbons and tags should be made in the fall so the conference budget will reflect the cost of needed supplies. Checks with the Administrator for supply houses, if needed. Administrator may also have some sample name tags from previous conferences.
- e. If applicable, keep an accurate count of the single and double rooms occupied each night during Conference as a check against fees charged by the host facility.
- f. Keep counts of meals purchased by registrants and those paid for by the Conference budget (these may or may not be so indicated on the registration forms). Be prepared to give meal counts to the Local Arrangements Chair and the Conference facility contact person, and keep accurate accounts so that the local planning committee can check charges at the end of Conference.
- g. If applicable, assign rooms with priority given to Board members, local planning committee members, Administrator, and those who are elderly, handicapped, or have other special needs.
- h. Prepare and print a list of registrants, their postal addresses, telephone numbers, e-mail addresses, and home congregations with city, for distribution at the beginning of Conference. This list is greatly appreciated by the attendees.
- i. If applicable and/or needed, compile a list of the arrivals and departures of those coming by airplane, train or bus, and gives a copy to the Transportation Chair or Hospitality Chair.
- j. Schedule people who can function well under pressure to work at the Registration Table.
- k. Be ready with registration forms for walk-ins. Report last minute additional participants to the appropriate committees: meals to Local Arrangements; workshop attendance to Local Arrangements; and tour participation to transportation/tours Chair.
- l. Direct persons wishing to pay membership dues to the Administrator at the CSLA Table.
- m. With the Hospitality prepare materials for the registration packet/tote.

7. **TRANSPORTATION/TOURS CHAIR**

- a. Determine the availability of public transportation between the conference facility and the airport, train and bus stations and provides this information to conference attendees.

- b. Arrange pre- and post conference tours
 - Contacts bus companies and chooses sites of interest that will be available at conference time.
 - Hire a certified tour company with complete liability insurance coverage who will be responsible for providing the buses.
 - Make tours self-supporting; it is recommended that a percentage of total bus occupancy be estimated and used to determine tour ticket prices as buses are not always sold out, tour income should be estimated to cover more than the expenses. Budget is submitted to Finance Chairperson based on this assumption.
 - Determine size of bus depending on number registering for tours suggests reserving 28-36 passenger buses, but having the option with tour company to increase or decrease size of bus
 - Schedule ½ day congregational libraries tour when CSLA Executive Board Meetings are not in session. Try to offer three congregational libraries of various sizes including one synagogue library if possible; offer synagogue library visit on Friday night if not possible on Saturday.
 - Provides bottled water and salty snacks on bus trips.
- c. Note: This job should not be paired with any other major conference responsibility so that Transportation/Tours persons are available to attend the tours.

10. **CONFERENCE COMMITTEE SECRETARY**

- a. Perform the usual, but highly important, secretarial duties of taking and distributing minutes of the Conference Committee. It is most helpful for individual committee members to be able to concentrate on the meeting and not be responsible for taking notes.
- b. Send minutes to Administrator and CSLA President in addition to Conference Committee members.

11. **PROGRAM BOOKLET**

The task of producing the conference program booklet is best done by someone who has some experience in publications. There are many program booklets on file in the conference committee from the beginning. Try to recruit such a person to be on one of the committees - most logically the Program Committee.

III. **ROLE OF NATIONAL STAFF**

1. **ADMINISTRATOR**

- a. Serves as ex officio member of Conference Committee.
- b. If budget allows (As soon as needed by Conference Committee,) travels to Conference locale to negotiate with Conference Committee the potential Conference facility.
- c. Signs official binding contract for use of Conference facility, and also, if needed, for the Executive Board winter meeting. Copies are given to the General Conference Chairperson(s) and to the Treasurer.
- d. Works closely with all members of Conference Committee on all Conference details.
- e. Has up-to-date list of past exhibitors and sends to Exhibits Chair.
- f. Receives exhibit reservations, deposits checks and forwards reservations to Exhibits Chair.

- g. Sees that National Office supplies any clerical help to all Conference Committee members, as requested.
- h. Maintains a supply of conference registration forms and distributes them as needed to members and non-members.
- i. Maintains up-to-date list of library and denominational headquarters/offices and provides same to Publicity Chairperson.
- j. Answers or refers inquiries concerning Conference received at the office and mails conference registration form and all pertinent information, when requested.
- k. Receives completed registration forms. Checks for accuracy, records, and deposits all checks. Sends confirmation letter (text provided by Registrar) travel directions, and information on airport shuttle service to registrants. Forwards registration forms to Registrar, along with photocopies to the General Chair.
- l. Coordinates with Conference General Chairperson and Program Chairperson for the assignment of hosts for each workshop.
 - Sends instructions to those agree to be hosts.
 - Sends notification to each workshop leader giving host's name and job description, based on volunteers responding to request in the registration form. Sends sample forms of host/hostess instruction and evaluation forms to Hospitality Chair.
- m. Is responsible for sales of CSLA materials (CSLA Guides, note paper, etc.) at Conference.
- n. Before Conference, may compile and mail list of all registrants, unless local planning committee has done this.
- o. Sends suitable workshop materials to Publications Committee Chair and Library Services person following conference
- p. Shares all helpful information at her disposal concerning conferences.
- q. At the conference takes credit card payments for walk-in registrations.

2. **PUBLICATIONS CHAIR and CLT Editor**

- a. Works with Conference General Chair and/or Publicity Chair on all material that appears in *Congregational Libraries Today* concerning Conference : short article or ad by September 20 for the October-December issue; feature article by December 20 for January-March issue; short article/ad by March 20 for the April-June issue.
- b. Receives from Conference Committee within one week after the January board the completed registration form for insertion in the January -March issue and uploading to the Web.

TO ALL CONFERENCE PLANNING COMMITTEE MEMBERS

The best insurance for running a successful conference is to double check all arrangements frequently and not leave any details until the last minute. The Conference General Chairperson should keep in close contact with all members of the conference committee to be sure that all plans are going according to schedule. All committee members should keep in mind the Seven Basic Laws of Frustration, Mishap and Delay:

- 1. If anything can go wrong, it will.
- 2. If anything just can't go wrong, it will anyway.
- 3. When things are going well, something will go wrong.
- 4. When things can't get any worse, they will.

5. Anytime things appear to be going better, you have overlooked something.
6. If you explain something so clearly that nobody can misunderstand, somebody will.
7. If you do something which you are sure will meet everybody's approval, somebody won't like it.

In spite of the operation of these laws, each conference has been better than the last, and yours will be the best yet!

IV. ROLE OF EXECUTIVE BOARD

- A. **ADVISORY CAPACITY** - Serves as an advisory capacity to the local Conference Committee. Conference General Chair[s] send pertinent correspondence relating to the Conference to the President, First Vice President and the Administrator. The Conference General Chairperson reports to the President on the progress of the Conference at intervals of at least once a month. The President is responsible for reporting or conferring with the Executive Committee and/or Board when he/she deems it advisable.
- B. **CONFERENCE SITE** - Establishes the conference locale and dates, at least three years in advance, if possible. It is currently the policy to meet at a hotel/conference center. Preference should be given to locations where there are chapters, affiliates, or concentration of members which could be a potential new chapter site.
- C. **PROGRAM** - Approves the meeting site at the Executive Board winter meeting one and one-half years before conference, and program plans for Conference at the Executive Board winter meeting preceding conference.
- D. **BUDGET** - Approves Conference income and expense budget presented by the Conference Committee at the Executive Board winter meeting.

SPECIFIC DUTIES OF EXECUTIVE BOARD MEMBERS

1. **NATIONAL PRESIDENT** (whose term ends with Conference).
 - a. Serves as ex officio member of Conference Committee in an advisory role.
 - b. Writes letter to incoming and outgoing Executive Board members regarding pre-and post conference Executive Board Meetings, dates/times, and due dates of Board reports.
 - c. Presides at pre-conference Executive Board meetings.
 - d. Presides at CSLA Annual Business Meeting.
 - e. Presides at other occasions at request of Conference Chairperson.
 - f. Arranges for installation ceremony for incoming National officers.
 - g. May assist Conference Committee in the designation of persons to preside at meals and offer blessings.
2. **NATIONAL FIRST VICE-PRESIDENT/PRESIDENT ELECT** (whose term of office as President begins at conclusion of the Annual Meeting)
 - a. Arranges to meet first timers and may give small gifts to them. Welcomes first timers at the opening luncheon.
 - b. Presents new National Committee Chairs to membership.
3. **NATIONAL TREASURER**
 - a. Sends National Conference budget codes to Conference Finance Chairperson, using a previous budget sample.
 - b. Is responsible for deposit of all Conference receipts and payment of all Conference bills,

in conjunction with the Administrator, Conference General Chair[s] and Conference Finance Chair/Treasurer.

- c. Is responsible for a Conference financial report, in conjunction with Association's Financial Assistant.
- d. Provides to Conference Committee an expense form for direct invoice payment or expense reimbursement.

4. NATIONAL CHAPTERS COORDINATOR

- a. Work with Conference I Chair[s] and immediate Past President to plan food (dessert/breakfast/snack, etc.) and /or other activities combined meeting for Chapter Presidents or their representatives and the Advisory council. Attendance is by invitation only. The cost is paid from CSLA general funds, not from conference income. Coordinate with Conference General Chairperson on all arrangements including dates, times, food, and rooms needed.
- b. Writes letter of invitation for Chapter Presidents/Advisory Council meeting to the above activity to be sent with other Conference information to Chapter Presidents
- c. Plans program for Chapter Presidents'/Advisory Council meeting and along with immediate Past President presides at this function.
- d. Plans any type of Chapter recognition to be held during the course of the Conference, such as anniversaries.

5. NATIONAL IMMEDIATE PAST PRESIDENT

- a. Works with Chapters Coordinator, Conference Chair[s] on logistical plans to arrange for the Chapter Presidents Advisory Council reception.
- b. Along with Chapters Coordinator, plans Chapter Presidents/Advisory Council reception agenda and presides at the meeting.
- c. Presides at Past Presidents' Prez Corps meeting, if one is scheduled.

6. NATIONAL AWARDS COMMITTEE CHAIR

- a. Works with Conference General Chair[s] to arrange Awards Banquet program, communicating the number of awardees who are attending Conference and the financial arrangements involved.
- b. Sends letter to awardees outlining the hotel and room reimbursement and meal policies
- c. Presents CSLA Awards at the Awards Banquet.
- d. The Rodda Award Chair will present the Rodda Award at the Awards banquet.

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