

## **Meeting Planning Handbook For 1st and 2nd Vice Presidents**

Georgia Ornithological Society

August 17, 2011

The purpose of this document is to provide GOS meeting planners with a time-table and checklist to aid them in carrying out their duties. Responsibility for planning and organizing the meetings of the society falls to the 1st and 2nd vice presidents, with the aid and advice of the Executive Committee and volunteers from the membership in the meeting locales.

The 1st VP is responsible for program content: obtaining speakers, determining their needs, notifying the *GOShawk* editor and 2nd VP of their identity, biographical information, and topics, and insuring their proper reception and escort. The 1st VP will also insure that field trips are arranged and led.

The 2nd VP is responsible for meeting arrangements with the facility where the meeting takes place, for providing timely notification to members of meeting details, for handling advance and on-site registrations, and for printing name tags to be presented to attendees upon registration. The 2nd VP will be the single point of contact between the society and the management of the meeting facility

The Executive Committee approves the meeting sites, which may be suggested by any GOS member, as well as the guest speaker selections for each meeting.

### **I. SELECTING A MEETING WEEKEND AND DESTINATION**

GOS meeting planners should begin making arrangements 12 to 18 months in advance. Review past meeting locations with a view toward “spreading the joy around,” especially if members in an area that has been by-passed lately extend an invitation or, when asked, would be willing to help out. The vice presidents should make meeting location recommendations to the Executive Committee and ask for a decision on locales for the meetings. Winter (January) and fall (October) meetings generally take place in coastal locations such as Jekyll Island or Tybee Island, whereas spring (April) meeting locations tend to range across the state. Meetings in the Georgia mountains are generally arranged every two to three years, and ideally should be scheduled for mid to late May. It’s important to periodically bring meetings to Georgia’s major urban communities and university/college towns: Albany, Athens, Atlanta, Augusta, Brunswick, Columbus, Kennesaw, Macon, Milledgeville, Rome, Savannah, Statesboro, and Valdosta, Popular meeting destinations in the mountains include Blue Ridge, Clayton, Hiawassee, and Unicoi State Park. Consider holding joint meetings with ornithological societies in adjoining states every five to ten years.

Meeting dates should be determined based on the probability of good birding in the area, the availability of appropriate facilities, and avoidance of conflict with holidays or special events such as birding festivals or the Youth Birding Competition, All Women’s Birding Bust, Thanksgiving, Easter, major sporting events, local fairs or conventions, or Winter Waterbird Counts. Winter meetings have occasionally been scheduled in conjunction with the Winter Waterbird Count so that the count occurs on the Friday morning of the meeting weekend, thereby reducing travel time and costs for birders who like to participate in both.

### **II. MEETING OUTLINE**

GOS meetings generally run from Friday afternoon to Sunday mid-day, with the following sequence of events:

**FRIDAY:** Registration opens at 5:30 pm. For larger meetings (>90 attendees) a cash bar should open 30-60 minutes before the program, which should start at 7:45 pm in order to give attendees adequate time to eat

dinner on their own. Following the program, the field trips for Saturday should be described, preferably by the trip leaders.

**SATURDAY:** Early breakfast at 6:00 am, after which field trips depart. Social hour with a cash bar and a scientific poster session should begin at 5:30 pm, followed by the banquet (7:00 pm), program (8:00 pm), business discussion (if necessary), and species countdown. Cancel the countdown if the program ends much later than 9:00 pm.

**SUNDAY:** Early breakfast at 6:00 am, after which field trips depart.

Note: Field trips may be offered on Friday morning and possibly a few on Thursday morning or afternoon during fall meetings, in which case registration may also occur on Thursday night or Friday morning. Field trips are often arranged for Monday during winter meetings, which have frequently been scheduled for MLK weekend in January.

### **III. HOTEL/FACILITY SELECTION**

GOS members in the meeting locale may have recommendations regarding meeting facilities. In addition, the Chamber of Commerce or Convention and Visitors' Bureaus can help. An on-site inspection of possible meeting sites is essential unless the facility has been used in the past and has not changed.

#### *Considerations:*

1. Sleeping room rates (single, double, multiple occupancy), cut-off dates for guaranteed reservations, deposit and cancellation policies. Know the average number of members who attend meetings in the given location, and avoid committing to a guaranteed number of room nights that's likely to be higher than the meeting attendance.
2. Availability, attractiveness, and suitability of space for meetings, registration, and banquet. Is the banquet room designed in such a way that a large audience will be able to sit close enough to the speaker to see the presentation screen? Insulation from other groups (noise, conflicting schedules, demands on staff). It's best to avoid holding meetings in hotels that have locally popular drinking establishments (bars) sited so that they're in close proximity to the guests' rooms. Meeting room rental and A/V support charges, if any.
3. Menus and prices, including gratuity and tax for the banquet. Avoid high-rent meeting space. It should be free or low cost, especially if meals are served. The sleeping rooms and the banquet will offset the hotel's cost. Cash bar expenses. Dining room hours, especially breakfast, both Saturday and Sunday. If not early enough, proximity of alternate early-hour eating places.
4. Cut-off time for banquet numbers guarantee and percent of overage that can be accommodated (usually 5% of guarantee).
5. Adequate and safe parking? Will there be serious traffic problems to contend with when attendees are trying to depart for, or return from, field trips?
6. Will the hotel provide a contact person who is capable and will be on call throughout the meeting weekend?

When a decision is made on a particular facility, request a written contract and review it carefully to insure

that all needs are specified and all charges are as agreed upon. The menu, price of the buffet, and bar set-ups are arranged with the kitchen, generally 1 ½ months in advance. As time draws closer to meeting date, give the manager the number of meals needed – usually one week in advance. They will also need to know the number of vegetarian meals requested if an adequate choice of vegetarian foods is not included on the buffet.

#### **IV. SPEAKERS, PROGRAMS, AND FIELD TRIPS**

Ideally, meeting announcements should include as much information as possible on programs and field trips, as an inducement to attend. Therefore, these details should be finalized at least three to four months prior to each meeting.

Once a meeting locale has been selected, GOS members in or familiar with the area may be willing to assist in the development of programs and field trips. Such assistance ranges from merely suggesting possibilities to assuming responsibility for all arrangements.

The Executive Committee has authorized a \$250 honorarium for the Friday and Saturday night speakers. These honoraria may either be provided as a check to each speaker, or can be donated to a charity chosen by the speakers. In some instances it may be necessary to increase the honorarium in order to attract an especially prominent speaker, but this should not be done frequently or it will be difficult to pay for meeting expenses with registration and banquet fees. Increased honorariums must be approved by the Executive Committee. Friday night programs often feature speakers who have received grants from GOS, particularly graduate students, and have been asked to provide presentations to the membership concerning their accomplishments with the society's money. If this is the case, GOS will pay the speaker's expenses, but will not provide an honorarium.

GOS meeting planners should try to recruit speakers and especially field trip leaders from the area in which the meeting is to be held. Field Trip Leaders should be GOS members unless precluded by location or regulation. If the meeting speakers are notable birders, try to recruit them to lead or co-lead one or more field trips.

Speakers and field trip leaders are not expected to incur most of the expenses they would not otherwise have. GOS expects to pay for speaker accommodations, meals (including the banquet), travel expenses, registration, and field trip fees (if any). GOS will also pay for the same expenses for the speakers' spouses. GOS will pay the registration fees, banquet costs, and field trip fees for trip leaders, but not their spouses. If a speaker comes from some distance by commercial means, reimbursement for travel expenses (e.g., airfare, rental car, or per diem) must be approved in advance by the Executive Committee and taken into consideration in setting the registration fee for that meeting.

#### **V. MEETING ANNOUNCEMENTS**

The meeting announcement packet should be mailed two to three months prior to the meeting. The meeting announcement should stir the reader's interest in participating. It should tell who the speakers are, something of their background, and describe their topics. Field trips and leaders should be included, and the registration form could, in some cases, provide for advance sign-up. The following information is essential:

1. Location and dates. Directions and map if required.
2. Sleeping room rates. Cut-off date for guaranteed reservations. Cancellation policy. Phone number and mailing address of the facility. Check-in and check-out times.

3. Member and non-member rate registration and banquet fees, including the cost for attendees who want to see the banquet speaker's presentation, but don't want the banquet meal. Check payable to GOS. Cancellation policy (dictated by the meal guarantee requirement). Cancellations should be received prior to the time banquet meal numbers are guaranteed, usually one week prior to the event.
4. Field trips and/or special events. Provision for sign-up in advance and payment of extra charges if any. (Note: Sometimes there is a boat trip or other voluntary activity that costs extra.)
5. A liability waiver statement to be signed by anyone planning to attend a GOS meeting.

The 1st and 2nd VPs will provide the text for the meeting announcement and the 2nd VP will draft the registration form. Meeting attendees will mail the form to the 2nd VP along with registration payment.

Meeting information should be sent to other birding organizations in Georgia in hopes it will be published in their newsletters. The information should also be posted on the GOS website and on GABO, and, if possible, should be sent to newspapers, college biology departments, and nature centers in the location where the meeting will be held. This should be done by the 2nd VP two months or more ahead of time.

## **VI. PRE-MEETING ACTIONS**

### *1st Vice President*

Check with speakers on their plans and needs: transportation, accommodation, audio visual support, spousal accompaniment, dietary limitations if any, expected arrival times and length of stay. Assign escorts to meet speakers upon arrival, and see that they are well looked after for the duration of their stay. Items involving the meeting facility, such as room reservations, audio visual support, etc. should be relayed to the 2nd VP as the single point of contact with the management of the facility.

Obtain biographical information on speakers and be prepared to introduce them at the meeting. Pass information to the GOS President to ease his/her greetings and conversation with the speakers.

Check on field trip plans and requirements. Are lunches, water, or snacks needed? Special clothing (e.g., boots for marsh stomping)? Duration and anticipated return? Map needs? Rendezvous locations? What is the difficulty level of the trips? Driving or walking or both? Anticipated insect problems? If box lunches may be desirable from the facility, let the 2nd VP know.

Be prepared for the unexpected: speakers who cancel at the last minute or have trouble on the way, or field trip leaders who get sick. A slide show or video in reserve is good insurance.

Feed all the above information to the 2nd VP for inclusion in handouts at the registration desk. It's essential that field trip participants know the name and cell phone number of their trip leader(s), as well as where and when they will meet the leader(s), and have maps depicting how to get from the meeting location to the field trip destinations.

### *2nd Vice President*

#### *Pre-registration*

The 2<sup>nd</sup> VP will receive all registrations and track income, field trip registrations, banquet reservations, and those that just want to hear the speaker. They will also need to track cancellations and refunds. A final

accounting, with the checks, will be provided to the Treasurer within one week of the meeting's conclusion. Field trip leaders will receive complimentary registration to both the meeting and banquet (spouses are not complimentary). Speakers and their spouses will receive complimentary registration to the meeting and banquet. Occasionally, a leader will be added at the last minute. If so, flag the name tag for a refund at the registration desk. Insure that name tags are available for each registrant, including field trip leaders, speakers, and their family.

### *Handouts*

Handouts, placed in packets, should be available at the registration desk. Bags for preparing these packets are generally available from the local Chamber of Commerce or the Visitors Bureau, along with maps and travel brochures for the area. If the meeting is in a remote location, purchase large envelopes from an office supply store for containing packet information. The 2nd VP will insure that these packets are prepared and on hand at the registration desk along with name tags. Basic handouts include:

1. Program/Schedule of Events (see example).
2. Field trips, locations, leaders, expectations, duration, requirements (lunches, maps, boots, difficulty, etc.)
3. Roster of pre-registered attendees (name, city, state – no email address).
4. Field checklist.
5. A map of the local area and basic information about restaurant options.

### *Registration Desk Supplies*

The 2nd VP should gather together the items that will be needed at the registration desk:

- GOS signs and easels. Include a dry erase board for special announcements, species tally, or phone numbers of trips leaders.
- Name tags and holders, including blanks.
- A known amount of change (e.g., \$50).
- Office supplies: stapler, scotch tape, writing pens, and Sharpies for sign-making, name tags, etc.
- Registration log.
- A supply of blank forms for late registrations. The forms include a liability release statement which must be signed.

### *Facilities*

Relay developing information to the meeting facility management as required: unexpectedly high or low registration, audio/visual needs, speaker room reservations, banquet menu, etc. If new personnel have taken over at the facility, review the contract with them and insure no surprises.

Nothing beats an on-site visit to the facility prior to signing a contract. This should be done to insure that

the meeting space is truly adequate, the registration area is suitable, times and places are agreed upon and correct, VIPs have guaranteed reservations, etc.

At the agreed interval prior to the banquet, negotiate a guarantee on the number of meals required, mindful that this number will have to be paid for whether consumed or not. This is a guessing game, but here are some guidelines:

Be wary of “will pay at the door” advance registrations. Half will be no-shows. People who show up at the last minute often offset the number of pre-registrants who do not attend.

Hotel/motels say they can only feed 5% over the guaranteed number, but with a buffet this is not as much of a problem as with a seated dinner. So, always ask for some extra place settings to insure that last minute folks may be accommodated.

## **VII. MANAGING THE MEETING**

### *2nd Vice President*

It will speed on-site registration if name tags are arranged alphabetically ahead of time. Hold back any name tags of persons who owe money, or are owed money. This insures that any discrepancies will be handled at the registration desk.

Arrive at the meeting facility well ahead of time, get with the appropriate staff ( sales contact, banquet manager, etc.) and “walk through” the meeting with them, resolving any misunderstandings, insuring agreement on times, locations, needed support, etc. Also, hand them a copy of the schedule of events. A clear understanding of the payment procedures is essential. For example, will GOS pay on departure or be billed? Will the 2nd VP use his/her personal charge card and be reimbursed by the treasurer upon presenting the bill? When will the bills be ready?

Normally the bills are ready soon after the Saturday evening function or first thing the following morning. They are reviewed by the 2nd VP for accuracy and relayed to the Treasurer for payment or reimbursement. Be sure to check that complementary rooms are given credit if any are offered under the contract.

At-the-door registrants will need to fill out a registration form since it contains the release they must sign to participate in the meeting and field trips. They can then be issued name tags and invited to pick up their packets. Keep a record of checks and cash taken at the door.

By Saturday evening, the registrars should have a full accounting of the monies taken in from at-the-door registrations, and the 2nd VP should know if some or all of the no-shows can be reimbursed some or all of their pre-payments. This decision is based on meals guaranteed versus meals paid for.

It remains for the 2nd VP to obtain the bills from the facility, review and approve them, and settle the bill.

### *Gratuities*

Facilities customarily include gratuity in their food and beverage bills, and that is sufficient for the Saturday evening function. However, the staff of a facility may be exceptionally helpful in other ways, such as opening the dining room early for breakfast or going out of their way to respond to last-minute requests. In such cases it is not uncommon for meeting planners to show appreciation with an additional gratuity.

### *Registration Table Location*

The GOS registration area should be in or near the hotel lobby, but sited so that there is sufficient space for members to mill around and chat. If this is not possible, a sign should be posted in the lobby explaining how to find the registration table. Two 8 ft. tables will be needed, along with several chairs. During busy hours, two volunteers will be needed to tend the registration table. A GOS logo sign on an easel or fastened to the table will steer registrants to the right spot. Place name tags on the table in alphabetical order. Have packets ready to hand out to attendees as they pick up their name tags. Any name tags not claimed will indicate a no-show and can be helpful in adding additional meals requested by at-the-door registrants.

Field trip locations and descriptions, along with an area map and a list of local restaurants, including breakfast options, should be available to registrants. Try to set up the registration tables in the lobby of the meeting hotel, or erect a sign in the lobby directing members to the location of the registration tables. A set-up area (two additional 8 ft. tables) should be arranged for the business manager.

### *Banquet Night*

Monitor registrations and coordinate with the banquet manager on numbers for the Saturday evening buffet. It is best to set a few more places than you expect to need. Be sure that the table closest to the podium is reserved for the speaker, president, etc.

Be on-hand and visible prior to and during the social hour Saturday evening to resolve any last-minute requests for additional banquet seats or other registration matters, to resolve any questions the banquet manager may raise and coordinate the timing for opening the buffet line.

Let the president, 1st VP and their guests know ahead of time when you are about to announce the meal being ready so they can be first in line. Keep an eye on the food line and let the kitchen know if they are running out of an item, with numbers of people left to be served.

Write thank you letters to the management of the meeting facility, volunteer registrars and anyone else who assisted in putting the meeting on.

### *1st Vice President*

Check on the set-up and preparations for each meeting prior to the scheduled commencement. Be sure that audio/visual equipment requested is in place and operating, unless otherwise provided. Know where the light switches are and see that they are actuated as necessary. Test the microphone and know how to operate the amplifier. Check the line of sight for the audience to the projection screen, and make sure that people won't be seated too far away to see the screen. Find out whom to contact on the hotel staff for last-minute help.

Look after the guest speakers and their spouses. Make sure they are greeted on arrival and their hotel room needs are taken care of. Provide an escort to get the speaker's gear to the meeting place and help to get set up. Offer refreshments after their journey, and see that they have a good meal in pleasant company at our expense. See that he/she meets our president and other interesting members before the meeting. Obtain enough information about each speaker and their topics to introduce them when they speak. Be sure each speaker knows how to operate the mike and audio-visual equipment, and you know when to dim the lights for their presentation. Upon departure, see that he/she is sent on the way with our thanks, and within a day or two, receives a nice letter from us thanking him/her again for being with us. Ensure that the speakers

receive their honorarium.

Coordinate with the president on the sequence of events at the Friday and Saturday evening meetings. Oversee or conduct the briefing on field trips Friday evening. Provide sign-up sheets on Friday and Saturday night for the field trips, as well as maps to the destinations. Meet with the trip leaders and ensure they describe the trips to the audience, including where participants will rendezvous, and provide their cell phone numbers to trip participants. Also ensure that the trip leaders collect the sign-up sheets at the end of each evening. In some cases trip participants will meet trip leaders at the trip destination. Make sure that the leaders know about these people, and have agreed on a meeting time.

Arrange the species countdown following the Saturday night speaker. It's usually a good idea to invite a member from the local area to lead the countdown. Tally the countdown, and remind meeting attendees to email or call-in any additional species observed during the Sunday field trips. Send the details to the *GOShawk* editor and the webmaster, and post it on GABO. A summary of the meeting, which is often written by the President, should be sent to the newsletter editor in time for the printing of the next issue. This summary should also be sent to the webmaster.

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### **Sample Registration Form**

<b>GEORGIA ORNITHOLOGICAL SOCIETY</b>	
<b>FALL 2010 CONFERENCE</b>	
<b>JEKYLL ISLAND, GA</b>	
<b>OCTOBER 6-9, 2011</b>	
NAME(S) (for name tags, print legibly please): _____	
<b>Note: Children under 16 must be registered but are charged no registration fee.</b>	
Address: _____	
City/State/Zip: _____	
Phone: _____ e-mail _____	
_____ Meeting Registration(s) @ \$25.00 per person*	\$ _____
*Member rate includes member and immediate family members.	
_____ Meeting Registration(s) @ \$35.00 per person (non-member)	\$ _____
_____ Reservation(s) for banquet @ \$36.00 per person	\$ _____

No meal, but will attend the featured presentation @ \$10 \$ \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

**Note: No portion of registration or banquet fee is tax deductible.**

**Cut-off date for banquet reservations is October 3, 2011.**

**Make checks payable to GOS and mail with this form to:**

**Dan Vickers, 5249 Beech Forest Drive, Lilburn, GA 30047**

Registration and banquet cancellations received by October 3, 2011 will be refunded. If you should need to cancel, notify Dan at (770) 923-4927 or [dvickers@mindspring.com](mailto:dvickers@mindspring.com)

*GOS requires registration for participation in the meeting and field trips, and also requires all registrants to sign the following release. If the participant is a minor, a parent or legal guardian must sign this release.*

**RELEASE**

Each registrant named both adult and minor, desires to participate in the field trips and other activities at this meeting of the Georgia Ornithological Society (GOS). Therefore, each registrant knowingly and voluntarily grants to the GOS and its officers, committee members and any other persons engaged in activities in connection with this meeting, a full release from any claim, liability, or cost of any nature on account of personal illness or bodily injury, loss of life, or loss or damage to property directly or indirectly arising out of the registrant's participation in this meeting.

Name (print) \_\_\_\_\_ Signature \_\_\_\_\_

Name (print) \_\_\_\_\_ Signature \_\_\_\_\_