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## Planning a Chapter Event

The last thing you expected as in-house counsel was to find you've become a meeting planner too. But it seems you've taken a leadership role that now requires you to wear a new hat. Never fear — ACC's education department is here with step by step tips to make your event planning a little easier.

### I. Establish Theme

- A. Solicit program ideas from chapter members to ensure theme meets their needs and will be of interest to them
- B. Who is the audience?
  - 1. Are you addressing generalists or specialists?
  - 2. How well versed is the audience on the subject matter?  
Advanced, intermediate, novice?
- C. Why are you holding the program?
  - 1. What is the mission?
    - a. To gain new members
    - b. Warn corporate leaders of troubling new legal developments
    - c. Offer practical compliance tips
    - d. Provide a networking opportunity

### II. Develop Program

- A. What session format best accomplishes the program mission?
  - 1. Lecture
  - 2. Panel discussion
  - 3. Break-out groups
  - 4. Workshop
  - 5. Role-play
  - 6. Discussion of hypotheticals
- B. What other activities/events should take place during the program?

### III. Create a Budget

- A. Be sure to include cost of promotion, audio/visual equipment, food & beverage, meeting space rental fees, signage, registration materials, faculty expenses
  - 1. Use estimates provided by potential hotels for average food & beverage expenses, space rental, and audio/visual costs
- B. Forecast income on the conservative side and reflect the worst case scenario in expenditures

### IV. Find Appropriate Venue

- A. Utilize convention & visitors bureaus and the internet to identify all possible venues
- B. Provide potential venues with meeting specifications, which should include schedule of events, food & beverage requirements, audience size and room setup for each event, preferred pattern/dates (See [APPENDIX A](#))
- C. Conduct a site inspection
  - 1. Is the site easily accessible? Is parking/transportation

- convenient?
- 2. Are meeting rooms appropriate for events/audience?
- 3. Is space sufficient for a registration area, materials display table, coffee break setup, etc?
- D. Sign a contract
  - 1. Negotiate for everything you can
  - 2. Ask for meeting room rental waiver
  - 3. If utilizing sleeping rooms, ask for upgrades at the group rate or complimentary rooms for staff
  - 4. See sample contract provided as a guide for clauses such as non-construction, attrition, cancellation and arbitration

#### **IX. Secure Faculty**

- A. Who are the appropriate faculty members for this program? Are there recognized leaders on the subject matter who should be specifically targeted?
  - 1. In-house counsel
  - 2. Non-legal managers
  - 3. Outside counsel
  - 4. Consultants
  - 5. Government officials
  - 6. Academics
  - 7. Members of the judiciary
- B. Evaluate potential speakers
  - 1. Ask the speaker the following questions:
    - a. What are your credentials and background? (Do they meet my needs?)
    - b. Have you addressed similar audiences?
    - c. Will you provide written materials in support of your presentation? (If the program is CLE-approved, faculty must submit written materials to support their presentation)
- C. Prep speakers
  - 1. Provide your speaker(s) with as much information as possible
    - a. Audience size and demographics
    - b. Topic and length of presentation
    - c. Session format
    - d. Name and topics of those sharing the platform
    - e. Deadlines for materials, etc.

#### **X. Promote Event**

- A. What to promote
  - 1. Big name speakers
  - 2. Discounted registration fees
  - 3. CLE accreditation
  - 4. Delivery Methods
    - a. Mail
    - b. Broadcast Fax
    - c. Email

#### **XI. Meeting Logistics**

- A. Food & Beverage
  - 1. Order appropriate food for the event
    - a. Finger foods for reception
    - b. No heavy rich meals — tend to make people too tired

- to participate in program
      - c. Chocolate is always a winner
    - 2. Always have vegetarian option available upon request
    - 3. Decide between buffet vs. seated functions
      - a. Generally little difference in price
      - b. Which setup is most conducive to event? (i.e. If you have a speaker at an event, you should serve a seated meal to avoid people moving about during the presentation.)
    - 4. Provide your food orders along with room setups/assignments to your hotel contact. They will produce banquet event orders(BEOs) from your information
  - B. Registration
    - 1. Encourage pre-registration in promotional materials (by setting a registration deadline) in order to accurately project number of participants in advance
    - 2. Be sure hotel has sufficient space for a registration area
    - 3. Be prepared to accept registrations and make registration changes onsite
    - 4. Have materials to be distributed ready before registration begins
  - C. Supplies
    - 1. Create a "show kit"
    - 2. Fill it with office supplies
      - a. tape
      - b. pens(all colors), markers, pencils, highlighters
      - c. stapler, staples, staple remover
      - d. paper clips, binder clips
      - e. velcro
      - f. scissors
      - g. post-it notes, memo pads, paper
    - 3. Replenish your kit after every meeting so you are always prepared
  - D. Audio/Visual equipment
    - 1. Request presenters provide you with their A/V needs well in advance of the meeting
    - 2. Negotiate on price for larger items (i.e. LCD projector) if you will use more than 2 of them.
    - 3. Order A/V through the hotel at least one week before the event

## **XII. Onsite**

- A. Request a pre-con meeting
  - 1. Meet with your hotel contact and other members of the hotel staff to review your food orders, A/V requirements, room sets, and special requests. Make changes to your orders and provide guarantees for your food functions at this time
- B. Keep a copy of your BEOs with you at all times to ensure the hotel does things as planned
- C. Plan for the best, expect the worst and things usually work out somewhere in the middle