



# **CONFERENCE PLANNING MANUAL**

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## **Introduction**

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

The purpose of this manual is to guide future Chairs Elect of KPLA in their efforts to plan the annual conference. All ideas in this manual have been sifted down through the years and are to be used as guides only. This Conference Planning Manual should be updated by the Conference Chair and the KPLA Chair every year, adding any ideas and thoughts, and adding the immediate past conference's statistical data in the appendix.

## Conference Committee

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

The Conference Committee begins meeting around July of the year prior to the conference. The members are chosen by the Chair Elect but traditionally include:

- KPLA Chair;
- KPLA Past Chair;
- KPLA Incoming Chair Elect;
- KPLA Treasurer;
- KPLA Secretary;
- KLTRT Chair;
- A Vendor Coordinator;
- A Room Monitor Coordinator;
- And a KDLA staff member.

Solicitations are made in May/June for volunteers from the membership for the planning committee. The Vendor and Room Monitor Coordinators may not become active until later in the planning process.

## Committee Member Responsibilities

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

### ***Chair Elect***

The KPLA Chair Elect is nominated and elected approximately eighteen months before the annual meeting for which she/he is organizer. The dates and location of the conference will have been confirmed by the Board two years in advance. At the time the contract is signed, a Past Chair will have negotiated the conference hotel/center contract. The Chair Elect should be provided with a copy of the contract.

The Chair Elect is then responsible for organizing the conference. Major duties include:

- Review and summary of the evaluations from the past conference;
- Soliciting and choosing a planning committee;
- Choosing the theme of the conference;
- Selecting and confirming speakers and presenters;
- Booking the hotel accommodations for the KPLA Board and the Vendor Coordinator.
- Creating the conference schedule;
- Assigning meeting rooms;
- Printing the program;
- Setting conference fees and rates;
- Mailing the “save the date” postcard;
- Organizing the Annual Awards Luncheon;
- Being primary point of contact with the host hotel;
- Organizing any extracurricular receptions or events;
- Working with KLTA for sessions/moderators;
- Publicity (including informational emails);
- Local restaurant/entertainment information for attendees.

Each Chair Elect should choose a planning committee that will participate actively and with enthusiasm. The Chair Elect should be able to trust that delegated responsibilities will be handled. The Chair Elect should feel free to delegate as needed and should constantly/consistently seek the input of his/her planning committee.

The Chair Elect attends all KPLA Board meetings and reports on the progress of organizing his/her conference.

### ***Chair's responsibilities***

Technically, the Chair presides over the KPLA Conference. (It's a lot easier to preside over the conference than to plan the conference.)

During the conference, the Chair:

- Runs the KPLA Executive Board meeting;
- Attends the KLTRT Board meeting;
- Attends the Kentucky Friends' Board meeting;
- Sits at the head table during the Awards Luncheon;
- Conducts the KPLA Members Business Meeting. (The Chair Elect is generally recognized and thanked for his/her work on the conference during the Business Meeting. The Past Chair is generally recognized with a plaque.)

The Chair also serves on the Chair Elect's planning committee.

### ***Past Chair***

The past chair has very little responsibility during the conference.

Before the conference, the Past Chair will sign a contract for the conference site for the conference that is two years in the future. The contract will include:

- The conference hotel and center;
- The dates of the conference;
- The number (and size) of presentation rooms;
- The number of sleeping rooms (both smoking and nonsmoking) including the negotiated billing rate for the rooms;
- An approximate reservation for the number of luncheon attendees;
- An approximate reservation for the number of vendor tables;
- Direct billing information.

The Past Chair will report on the new contracted conference location at the KPLA Board and KPLA Business meeting. (Sometimes a small committee is formed to review potential sites and assist with the selection.)

During the conference, the Past Chair:

- Assists with the registration desk and other duties.
- Sits at the head table during the Awards Luncheon;
- Nominates the incoming slate of KPLA officers during the KPLA Members Business meeting.

The Past Chair serves on the Chair Elect's conference planning committee.

### ***Incoming Chair Elect***

The Incoming Chair Elect is chosen in the spring conference. The Incoming Chair Elect becomes the Chair Elect at the following fall KPLA Business Meeting.

During the conference (the conference immediately after being chosen), the Incoming Chair Elect has no official duties but does serve on the Conference Planning Committee.

KPLA does not cover the hotel expenses or registration costs for the Incoming Chair Elect.

### ***Other responsibilities***

Three major conference responsibilities typically fall to other members of the planning committee:

- Awards Committee Chair: the annual awards (presentation, plaques, winners, etc) are totally organized by the Awards Committee Chair;
- KPLA Treasurer: conference registration is handled by the KPLA Treasurer and the Treasurer should provide regular emails apprising the committee of the number of registrations;
- Vendor Coordinator: soliciting, recognizing, and organizing the conference vendors, getting them committed, assigning them space, asking for any special accommodations, keeping the Chair Elect informed of the higher level vendors (for the conference program), and creating a final list of the vendors for the conference packet.

Planning a conference is a large undertaking. The Chair Elect should ask many, many questions of the previous chairs and feel free to do so.



## Registrations

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

Registration for the conference is handled by the KPLA Treasurer. The conference program should reflect that all registration forms be mailed to the Treasurer's home library.

In the past, most Treasurers have used an Excel file to keep track of registration information. Keeping track electronically is not only easier but allows for the conference name tags to be created/printed very easily. Jimmie Epling (KDLA Regional Librarian) also created a Microsoft Access database that can track registrations and print name tags.

# Conference Sessions

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

## ***Program tracks***

It will help with planning and coordinating sessions if the planner divides up the sessions into programming tracks. Tracks also allow the attendees to attend a variety of programs in their interest area without fear of too much overlap in time slots.

The nomenclature can vary, but there are usually tracks provided for:

- Administrative topics (which can include management, human resources, and trustee issues);
- Adult services (which includes reference, programming and collection development);
- Children's services (which includes both programming and collection development);
- Collection services (technical processing and acquisitions);
- Technology (explores new and existing technologies currently in use);
- Teen services (including both programming and collection development).

The planner should take great care to honor the programming tracks and avoid overlapping the session types.

## ***Soliciting proposals***

Several announcement soliciting proposals should be sent through various listservs that are used by Kentucky librarians (Kentucky Library Director's listserv, KYAC, and the general KPLA listserv).

If possible, a standardized format should be used to solicit proposals so that the same information is gathered from each potential presenter.

Proposals should be solicited and accepted electronically.

The deadline for submission is December 1. Be firm about that.

## ***Monitoring proposals***

It helps to keep a close eye on proposals to note when a particular programming track needs extra attention (not enough proposals, too many proposals). Announcements

should be made to the listservs when trends become obvious and some direction in the types of sessions needed become evident.

### ***Approving proposals***

The Chair Elect should form a small committee to review all of the program proposals and make selections. Attention to getting a full representation of all programming tracks is necessary.

The Chair Elect then sends notification of acceptance/refusal to the presenters.

The Committee should be prepared (though it has not been a problem) with defending its decisions.

### ***Communication with presenters***

After notification of acceptance, the presenters should receive regular emails from the Chair Elect. The Chair Elect should remind presenters that:

- They must make their own hotel reservations;
- KPLA does not cover the cost of registrations but doesn't charge if a presenter attends no other conference sessions;  
KPLA will provide a screen, a laptop, and a projector for the presentation room, any other equipment should be requested but may not be provided;
- All presentation rooms have wireless internet capability.

The Chair Elect should also mention any special considerations such as restricted parking, hotel renovations, etc.

### ***Session rooms***

The committee should do its best to match potential popular session presenters/topics with larger presentation rooms.

## Conference Packets

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

Conference packets are given to each attendee. The conference packets are usually “stuffed” on the night before the pre-conference. The conference packet includes:

- Printed conference program;
- List of vendors and supporters;
- Name tag and name tag holder;
- Lunch/special event tickets (including vegetarian meal indicator);
- Conference evaluation form;
- Local restaurant information (usually provided by the local Chamber of Commerce or the conference hotel).

There should be a label on the outside of the conference packet for the attendee’s name. The conference packets are usually kept in several boxes (divided alphabetically) at the registration desk. There should be a small supply (ten or so) of “blank” conference packets for walk-up registrations.

The Treasurer should make sure that there is an adequate supply of name tag holders and envelopes for the packets.

# Awards Luncheon

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

## ***The room***

The room will need to be big enough to hold the number of attendees, obviously, and that number will have to be estimated from prior attendance. Attendees sit in “Rounds of Ten” meaning round tables that sit ten each. There needs to be room for a fairly large head table, AV equipment, a table for the awards plaques to be placed upon prior to presentation, and a table (the same as the awards table) for the main speaker’s book signing (if required).

## ***Head table***

When meeting with the conference center liaison, arrangements will need to be made for a head table. The head table needs to be raised and should have room for ten people to sit including a podium.

The head table guests include:

- Any platinum level sponsors;
- KPLA Chair;
- KPLA Past Chair;
- KPLA Chair Elect;
- KPLA Secretary;
- KPLA Treasurer;
- KLTRT Chair;
- State Library Commissioner.

There is often a floral display on the head table that is paid for by KLTRT. Arrangements will need to be made for purchasing and setting this display up on the table.

## ***Food and Drink***

Tea, water, and coffee are served during the luncheon. The meal itself should consist of a salad, an entrée, and a dessert. The typical cost for each attendee is about \$25. In any case, KPLA does not seek to make any “profit” on the luncheon. The price for a lunch ticket should be closely tied to the price of each individual meal.

A vegetarian option is always provided if the main entrée is meat of any kind. There are generally very few vegetarian meal eaters. Vegetarian meal eaters are given a green ticket to place on their place setting to identify themselves to the servers.

### ***Main speaker***

A main speaker, generally an author, will provide the main entertainment for the luncheon. S/he should be instructed to have about 45 minutes of prepared material. A book signing is often offered after the luncheon has ended. (Volunteers to assist with money might be needed, but KPLA doesn't provide any funds or further support of book signings.)

The Chair Elect will need to coordinate the proper AV equipment for the main speaker.

### ***The Event***

Two volunteers will need to be stationed near the entrance doors to ask for tickets from those entering the luncheon room.

The KPLA Chair hosts during the Awards Luncheon. The Chair's work is very simple:

- When everyone (or most everyone) is seated, call the room to order;
- Identify everyone at the head table;
- Say that the main presentation will begin in about twenty minutes;
- Sit and eat;
- Call the room to order again when the dessert is served at about half the tables;
- Introduce any platinum sponsors and allow them to speak for a few minutes;
- Introduce the Awards Committee Chair to begin the awards ceremony and then sit down;
- When the awards ceremony is complete, introduce the main speaker and mention any book signing opportunities;
- Adjourn.

## **AV and other equipment**

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

Usually, the Planner will ask other libraries to supply AV equipment. KDLA has also been very generous historically with helping with AV equipment if needed. Renting AV equipment can be very expensive.

### ***Internet access***

Most conference attendees and presenters expect (or will demand) wireless internet access throughout the conference area. Having the area be wireless might be costly or impossible, however. All of the presenter rooms should be wired in some way (again, wireless is preferred).

### ***Laptops and projectors***

The conference center will charge considerably for laptops and projectors. The one place where you might consider renting (instead of borrowing from other libraries) is for the awards luncheon. If the speaker has a presentation or video, you will want double screens (one for either side of the room) and it will be easier to let the conference center's AV staff set that up.

Some presenters might want to bring their own laptop or projector. It's probably easier to just ask them to use a flash drive with the equipment that you provide.

### ***Screens***

Ask the conference center to supply screens.

### ***KPLA banners***

KPLA owns a couple of banners that will need to be set up near the registration desk. There are also directional signs to be used throughout the conference area.

### ***Junk bag***

Make sure you have a bag or box full of "stuff" like staplers (and staples), tape (duct, black, and transparent), Sharpies, regular pens, a pad or two, paperclips, etc.

# Registration Desk

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

The registration desk will need to be staff during the pre-conference and conference at all times. It is the central communication point for both conference attendees and conference planners under many circumstances.

## ***Scheduling***

Scheduling the registration desk workers is usually done by the KPLA Treasurer. Workers usually agree to one or two hour slots. There should always be two workers at the desk. There should be up to four workers on the morning of the first full day of the conference.

## ***Training***

There's really no official training, but workers should be prepared for normal public interaction (complaints and other drama) and should know:

- How to contact conference planning members.
- How to contact hotel staff.
- How to use any equipment.
- What to do with walk-ins (money, registration, etc).
- Conference hotel layout.
- Map of local area.

## ***Equipment***

There's generally a web-capable computer/laptop on the desk or near the desk for conference attendees to use as needed.

The conference registration packets are alphabetized and easily accessible on the desktop. A master list of registrations (from the Excel spreadsheet or Access database) should be handy.



## Vendor Exhibits

Created 30 Mar 2011  
Revised 30 Mar 2011  
Reviewed 30 Mar 2011

On the day of the main conference, there is generally a vendor exhibit area for conference attendees to visit with businesses that offer goods and services to libraries. The vendors pay a fee to reserve a booth. The fees become a major source of income for the conference itself.

### ***Vendor Coordinator***

Typically one member of the Conference Planning Committee will be appointed as Vendor Coordinator. The responsibilities of this position include:

- Compiling a list of prospective vendors;
- Soliciting prospective vendors;
- Arranging the vendor area (including internet connectivity and electricity) with the conference hotel;
- Mapping out the booth arrangements for the vendors;
- Placing placards on the vendor tables;
- Fielding concerns from the vendors during the conference;
- Sending thank you notes to the vendors following the conference.

### ***Vendor fees***

The fee for the vendor booths are decided each year by the Conference Planning Committee. KPLA does not, however, charge a fee for its own committees to have a booth during the conference.

### ***Historical vendor data***

<b>YEAR</b>	<b>LOCATION</b>	<b>COORDINATOR</b>	<b>CONFERENCE HOTEL</b>	<b>NUMBER OF VENDOR BOOTHS</b>
2008	Bowling Green	Charlotte Keeney	Holiday Inn	
2009	Lexington	Charlotte Keeney	Downtown Marriott	
2010	Bowling Green	Peggy Mershon	Holiday Inn	
2011	Lexington	Peggy Mershon	Griffin Gate Marriott	
2012	Bowling Green	???	Holiday inn	

## Educational Vendor Exhibits

Created 30 Mar 2011  
Revised 30 Mar 2011  
Reviewed 30 Mar 2011

In 2010, KPLA began soliciting educational institutions offering a course of study in library science to people in Kentucky a chance to meet face-to-face with conference attendees. The “Educational Vendor Day” is the last day of the conference so that these vendors are not taking away from the booths available during the regular exhibitor/vendor day (the second day of the conference).

### ***Vendor Coordinator***

Typically one member of the Conference Planning Committee will be appointed as Educational Vendor Coordinator. The responsibilities of this position include:

- Compiling a list of prospective vendors;
- Soliciting prospective vendors;
- Arranging the vendor area (including internet connectivity and electricity) with the conference hotel;
- Mapping out the booth arrangements for the vendors;
- Placing placards on the vendor tables;
- Fielding concerns from the vendors during the conference;
- Sending thank you notes to the vendors following the conference.

### ***Educational Vendor Fees***

“Educational vendors” are not charged a fee to reserve a booth during the Educational Day of the conference. If they choose to have a booth at another time, the usual fees apply.

### ***Historical Educational Vendor Data***

<b>YEAR</b>	<b>LOCATION</b>	<b>COORDINATOR</b>	<b>CONFERENCE HOTEL</b>	<b>NUMBER OF VENDOR BOOTHS</b>
2010	Bowling Green	JC Morgan	Holiday Inn	5
2011	Lexington	JC Morgan	Griffin Gate Marriott	Not held
2012	Bowling Green	JC Morgan	Holiday inn	

## APPENDIX A: Historical Conference Data

Created 16 Jun 10  
Revised 16 Mar 2011  
Reviewed 16 Mar 2011

<b>YEAR</b>	<b>LOCATION</b>	<b>PLANNER</b>	<b>NUMBER OF ATTENDEES</b>	<b>LUNCHEON ATTENDEES</b>	<b>SLEEPING ROOMS</b>	<b>NUMBER OF SESSIONS</b>
2008	Bowling Green	Kristi Tucker		150		
2009	Lexington	JC Morgan	330	206	200	60
2010	Bowling Green	Dave Schroeder	341	220		
2011	Lexington	Martha White				
2012	Bowling Green	Susan Nimersheim				

## APPENDIX B: Conference Timetable

Created 16 Jun 10  
Revised 16 Jun 10  
Reviewed 16 Jun 10

### *May/June*

- Sort and review evaluations from previous year's conference.
- Announce (via KPLA listserv) that a committee is being formed and request volunteers.
- Choose a conference planning committee.
- Chair Elect begins attending KPLA Board meetings to report on conference planning progress.

### *July*

- First meeting of planning committee (usually at the conference site).
  - Invite conference center/hotel liaison.
  - Determine a conference theme/tag line.
- Announce (via KPLA listserv) the conference dates, location, hotel phone number, and encourage early registration.

### *August*

- Begin soliciting (via KPLA listserv) for program presenters, include announcement of December 1 deadline for submissions. A web-based form for submissions works best. Make sure that all synopsis/descriptions are sufficient to make decisions on accepting/rejecting proposal.
- Begin soliciting for awards/scholarship entries with February 1 deadline.

### *September*

- Conference Planning Committee reviews the list of potential vendors.
- Begin identifying pre-conference speakers (who are sometimes contractual) and luncheon speaker (who is nearly always contractual).
- Announce (via KPLA listserv) the conference dates, location, hotel phone number, and encourage early registration.

### *October*

- Vendor Coordinator begins sending letters to potential vendors.
- Set conference registration fees and luncheon ticket costs.
- If necessary, make arrangements/reservations for evening entertainment on Thursday night for attendees. (In the past, there's been a talent show, a baseball game, visiting a new local library, etc.)
- If necessary, contact a graphic artist about designing artwork for cover, postcards, and other promotional materials.

### *November*

- Review received proposals, identify under-represented program tracks, ask the Committee for input on presenters to cover these gaps and solicit KPLA membership for expertise in these areas.
- Secure contracts for pre-conference and luncheon speakers.
- Begin creating a schedule of presentation rooms, luncheon rooms, small meeting rooms. You will fill this in as you schedule programs.

### *December*

- Proposals are due by December 1.
- Meet to approve proposals. Contact the accepted/denied presenters.
- Begin scheduling programs in rooms.

### *January*

- Finalize the schedule of programs. Ensure proper (it's a guess!) room size for the presentations.
- A draft conference program, listing presenters, dates/times, rooms, and other events should be ready by the first of February to be loaded on the KPLA website. Share this draft with presenters, get approval, before releasing the URL for it to the public.
- Final appeals for award/scholarship nominations.

### *February*

- Awards Committee nominations due by February 1.
- Mail "Save the Date" postcards. Mailing list can be obtained through the KLA Office or send the document to KLA to send to the printer with the mailing list. It should include a web address for the conference program book.
- Check on sleeping room block, adjust as necessary.
- Begin checking on luncheon food choices, note prices might not include a food service charge (up to 20%). Typically the price of the luncheon should cover the price of the food. KPLA doesn't seek a profit on the luncheon. Food choices should include a vegetarian option.
- Arrange for gifts for presenters (usually a small gift like a cup or lunch bag).
- Room Monitor Coordinator begins soliciting for volunteers.

### *March*

- Check on sleeping room reservation block, adjust as necessary.
- Conduct a final onsite inspection/review of the facility with the hotel liaison.
- Have the conference program printed. Make sure that the final version includes a notice of asking for prior arrangements for disabled (ADA compliance). Ensure

that the list of KPLA officers is accurate in the book. Make sure that the dates and location of the next conference is clearly indicated.

- Make arrangement for flowers for head table.
- If necessary, arrange for transportation to any special events.
- Contact local tourism bureau for handouts of hotels, restaurants, attractions, etc. Check on any other promotional items that can be given to conference attendees.
- Ensure that KPLA Treasurer is aware of any needed checks. The Treasurer usually secures the KPLA checkbook from KLA for use during the conference.
- Arrange for photographer. Especially during the luncheon and main speakers.
- Ensure that any directional signage needed during the conference is located and available during the conference.
- Finalize list of room monitors. Prepare instructions and time limit signs for room monitors.
- Contact recipients of conference attendance scholarships (both KPLA and KLTRT scholarships) so that they can make reservations and travel plans.
- Send out reminders for registrations.

#### *April*

- Finalize the food choice for the luncheon. Begin finalizing the estimate of attendees (typically allow for 20 walk in registrations for the luncheon). Finalize numbers/food on other snack times.
- Finalize vendor sponsorships and arrangement.
- Receive printed program books.
- Order envelopes, name tag holders, and other supplies for use in the conference attendee envelopes.
- Make plans with conference planning committee for meeting on Tuesday to begin getting conference materials together.
- Ensure that there is enough AV equipment for all presentation rooms.
- Solicit volunteers for staffing the registration desk and establish a schedule.
- Ensure that all conference planning committee members have exchanged contact information (cell phones!) for use during the conference.

#### At the Conference

- Night before conference: stuff the conference attendee envelopes with all materials, alphabetize, set up the registration desk.
- Morning of pre-conference: ensure that all AV in place, make sure that registration desk is staffed and stocked, check temperature/layout of all presentation rooms, thank vendors for their support personally.

After the conference

- Hand over the evaluations to the next planner.
- Update conference planning manual.
- Load pictures or other documentary information on the KPLA website.

## Appendix C: Educational Vendor Contact List

Created 30 Mar 2011  
Revised 30 Mar 2011  
Reviewed 30 Mar 2011

- University of Kentucky School of Library and Information Science (UKSLIS)  
Will Buntin, Will Buntin [wbuntinuk@gmail.com], 859-257-3317
- Murray State  
Johan Koren, (270) 809-2760
- Kentucky Community and Technical College  
Martha Birchfield, (859) 246-6288
- Northern Kentucky University  
Leslie Hamman, (859) 572-6157
- Western Kentucky University  
Cindy Houston, 270-745-6501
- Eastern Kentucky University  
Dr. Ralph Turner, [ralph.turner@eku.edu](mailto:ralph.turner@eku.edu)
- Kent State (Ohio)  
Flo Cunningham, 330-672-0003
- Florida State  
Christie Koontz, 850-645-7145, [Christie.Koontz@cci.fsu.edu](mailto:Christie.Koontz@cci.fsu.edu)